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Case Study: Business Process Enhancement

Executive Summary

Optimizing complex business workflows requires getting the right guidance to users at the exact moment they need it. Serving as the technical lead and Subject Matter Expert (SME) for **WalkMe**, I implemented a comprehensive Digital Adoption Platform (DAP) strategy centered on **Just-In-Time (JIT) training**. By embedding real-time guidance into everyday software workflows and actively engaging organizational leadership, service delivery was significantly streamlined, resulting in a **30% reduction in data entry errors** and a fully empowered, **self-service-enabled workforce**.

The Challenge

As software systems grow more intricate, traditional training methods – such as lengthy classroom sessions or static PDF manuals – often fall short. The organization encountered two primary operational hurdles:

- **Significant Impacts of Data Entry Errors:** Data structures that were unintuitive to manager and employee users, a lack of on-screen instructions, and minimal data validation controls made enabling universal self-service functionality untenable.
 - **Support System Overload:** A lack of immediate, context-aware assistance forced managers and employees to rely on HR administrative staff to accurately process data changes, which unnecessarily delayed updates to employee records and placed significant burdens on the HR teams.
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The Solution

To elevate the overall manager and employee experience, ensure data integrity and compliance, and enable seamless self-service, a JIT training strategy was architected directly within the live software environment:

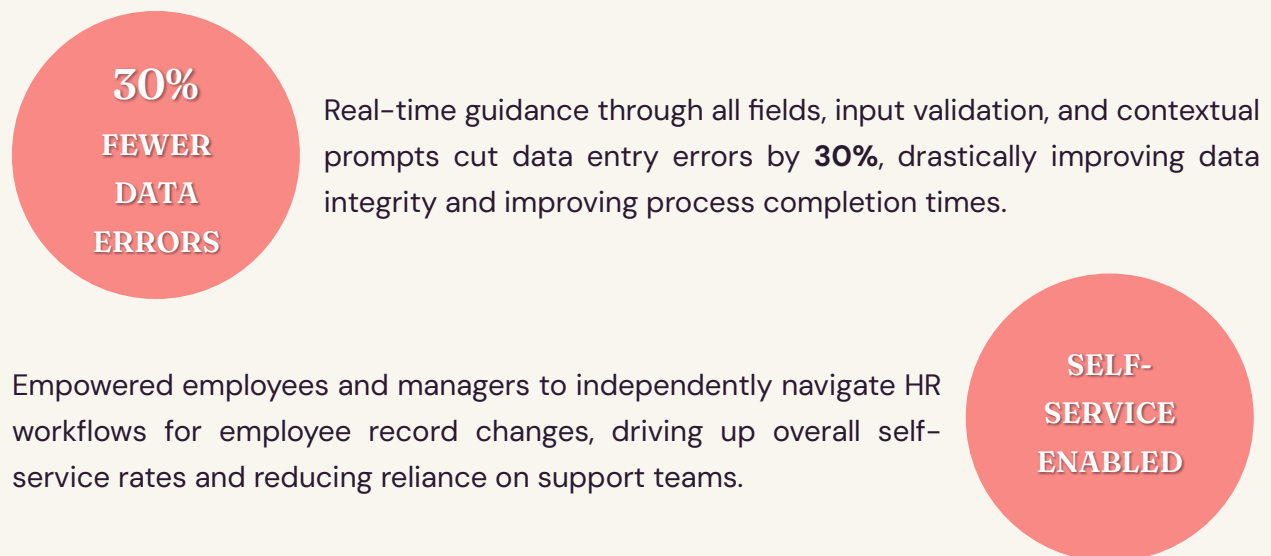
1. Technical Leadership & JIT Guidance Architecture

- a. Led the technical design and deployment of **WalkMe** overlay paths, context-sensitive smart tips, and automated validation rules across all self-service workflows within the HCM system.
- b. Delivered live, step-by-step guidance directly at the point of action, eliminating the need for users to leave their active workflows to consult external manuals and reducing data entry errors caused by the common desire to “wing it” and “just get it done” instead of consulting manuals for instructions.

2. Leadership Engagement & Change Management

- a. Collaborated closely with operational leaders to map high-friction process steps, identify key data-error hotspots, and test JIT training prototypes to ensure needs were met and the end result was effective.
- b. Positioned leaders as change champions, leveraging their feedback to refine digital guidance and align tool functionality with broader strategic business goals.

Key Results & Impact



- **Accelerated Service Delivery:** Context-driven, live guidance enabled managers and employees to complete key tasks faster and with greater accuracy, and self-service enablement eliminated the HR middle-man from the process of making changes to employee records.

- **Higher Tool Adoption:** Contextual, on-demand training boosted user confidence, drove consistent system adoption across the organization, and even prompted exploration of other underutilized system functionality.

Key Takeaways

Integrating just-in-time training and user guidance directly into HCM system workflows is one of the most effective ways to modernize HR business processes. By combining expert platform implementation with active leadership alignment, I reduced operational friction, elevated data quality, and fostered an agile, self-sufficient workforce that was able to successfully complete employee record updates faster and with significantly fewer errors.