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WalkMe Playbook Design Learning In the Flow of Work Solutions

CommOps Global Learning & Development
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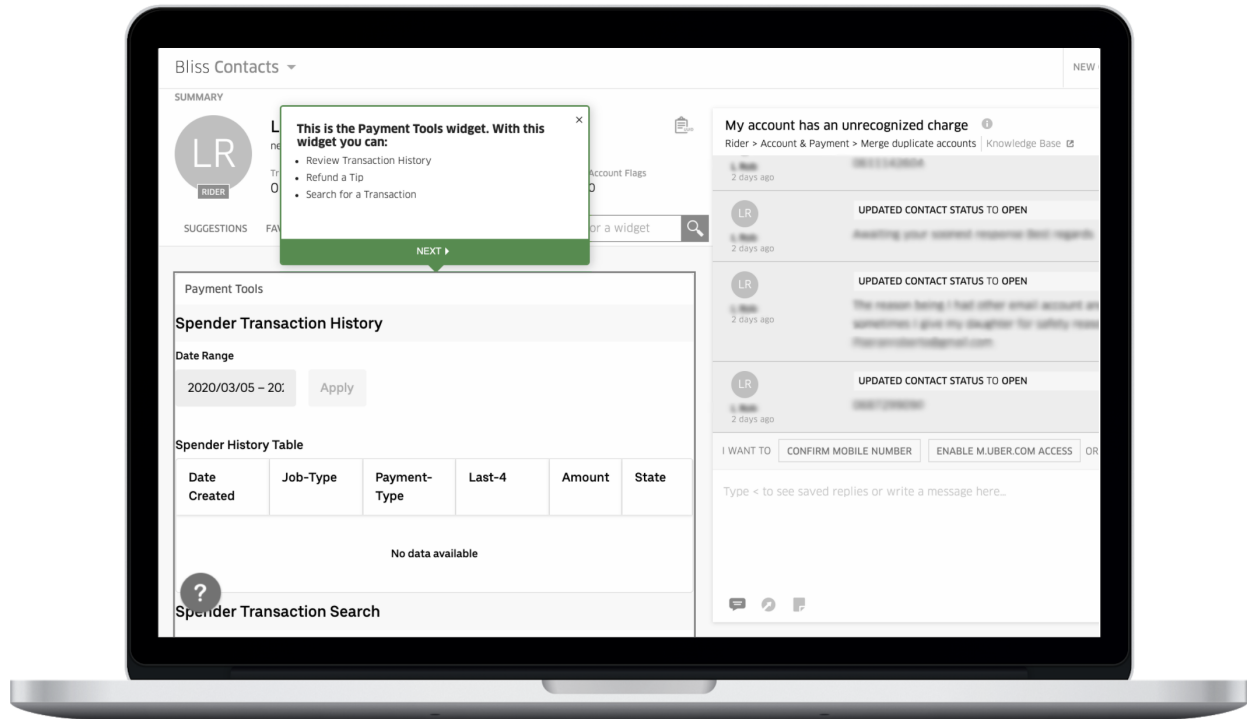
Introduction

Within this playbook, you will find resources to help you design and develop an "In the Flow of Work" learning experience using WalkMe as the primary tool. This playbook is divided by the phases of the design and development cycle: Plan, Build, Deploy, and Analyze. It is our goal that this playbook offers definitions and best practices for WalkMe learning solutions. If you have feedback or questions regarding the playbook, please submit a Jira.

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Theoretical Framework

Defined

Learning in the flow of work

- A concept and learning experience where learners can easily and quickly access answers or short pieces of learning content that will help them to do their jobs at their point of need.

Our Overall Approach

Instructive

- We want to provide our learners with education through clarity. Guiding learners through a curated experience. Consider the range of learners from beginners to experts; do not assume knowledge of how the flow or interface initially works. We want instructions to be clear, concise and easy to understand for a global audience.
- *[Resource: Don't Make Me Think by Steve Krug] Brief:* The smallest amount of information that will help me
  - Example: [ShoutOut Banner](#) announcing a new feature.

Non-intrusive

- We want our learning solutions to get out of the way of the learner. There is a lot of important information that learners need to be able to see during their day to day. Make sure not to block any critical information in the moment we are designing for. Be mindful of the overall system, the learner's context. Our solution needs to work seamlessly and sequentially in a pre-existing flow and integrate with what already exists.
- *[Resource: Don't Make Me Think by Steve Krug] Unavoidable:* Formatted in a way that ensures I'll notice it
  - Example: [ShoutOut Banner](#) placed in an empty space to draw the learner's eye.

Focused and Timely

- We want to provide relevant content at the right time. It's not just what, but when. It is important to consider not only what content is relevant to the learner, but when should

we deliver it. Do not overwhelm learners with all the information at once. Instead, it's better to present bite-sized information when it is appropriate.

- *[Resource: Don't Make Me Think by Steve Krug] Timely:* Placed so I encounter it exactly when I need it
    - Example: Smart Walk-Thrus is available only when the learner is working on a payment/refund.

[Appendix] Read more about why we use Learning in the Flow of Work.

When to use Learning in the Flow of Work

Objective and End Goal

To Address Weaknesses in a learner's process and/or performance. Doing so will allow learners within the company to strengthen their skills for further development.

To Demonstrate Consistency by giving learners time and space to apply what they have learned to real-world scenarios. Encourage this behavior by modifying learning to be repetitious to increase retention of knowledge. This helps establish fundamental capabilities that help learners work better independently and in group settings, with the confidence of knowing they've been provided the proper training and skills to do their job efficiently.

To Develop Employee Satisfaction giving learners the sense of being valued, by giving them relevant and timely support in the flow of work. Learners will engage and stay longer if they feel that an investment is being made into their development.

To Drive Employee Performance by giving them the means to grow with the company and contribute to a culture built around learning and performance. Continuous learning in the workplace makes employees knowledgeable about their role, curious to learn more, and how to enrich their time at work.

At Uber we use WalkMe for Learning in the Flow of Work

What is WalkMe?

A software tool used by learning experience designers to create guided help (demonstrations, walkthroughs, tips, workflows, new features, etc) within the systems, tools, and other web-based services learners use during their everyday work.

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Plan

[Resource] Design and Development Cycle Template
Start building your WalkMe solution by duplicating the Design and Development Cycle Template. In the Plan Phase, you'll complete the following three steps:

- Problem Discovery
- Solution Discovery
- Solution Sign-Off

Problem Discovery

Use Cases

[Resource] Use Cases: How to Write, Resources and Templates
Develop use cases with stakeholders to gain a better understanding of the learning gap/problem you are solving for and how to focus your learning solution.

Review collected regional use case examples:
- APAC
- US&C
- LatAm
- EMEA

Problem Discovery	User Stories	
	User [Actor / Persona]:	*Example: Uber Eats CSR*
	User's Goal:	*Example: Learn about new changes to contact types*
	Basic Flow to Achieve Goal:	*The IRT agent is assigned a queue of safety related contacts to resolve each day. They go through each issue trying to understand what the user is reporting and determine how to resolve the issue. In Bliss, an IRT agent will review what the user reports, and what the issue type is. In order to resolve they need to understand the specific issue and look it up using the Knowledge Base in Salesforce. After looking it up they will follow the support logic in order to resolve the issue.*
	User Story:	*As an IRT agent, I [want to] understand the updates to the contact types, [so that] I am able to correctly identify and resolve contacts.*

Use Case Template

Use Case Name	
Region	
User [Actor / Persona]	
User's Goal	
Basic Flow to achieve Goal	

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User Story	As a [actor/persona], I [want to], [so that].

Learning Solution Objectives

[Resource] Learning Solution Objectives (D&D Cycle)

After you identified the User Stories that will give you a clear understanding of what the user should achieve, it is time to set your Learning Solution Objectives.

Learning Solution Objectives

Learning Solution Objectives	WalkMe Goal
Level 1 (reaction) : After completing this program, participants should give high ratings on: *Standard: The learning solution's relevancy and effectiveness through the LES.*	N/A
Level 2 (learning): After completing this program, participants should be able to: *Example: Use the Payment Tools widget to refund a tip*	*Example: User clicks on 'Refund Tip' button*
Level 3 (behavior): After returning to the job environment, participants should: *Example: Use the Payment Tools widget instead of Braintree for 100% of Payment Contact Type Groups.*	*Example: 100% users use Payment Tools & 0% users use Braintree*
Level 4 (results): When the materials are fully implemented, the following business metric should be realized: *Example: Lower average handle time per user issue requiring a refund.*	*N/A*

Develop learning solution objectives with stakeholders that follow the Kirkpatrick Levels and aim to impact the business. These will help align with Subject Matter Experts (SME) in order to clarify what type of behavior change or impact is wanted from the learning solution. A good objective addresses the specific thing(s) the Subject Matter Expert (SME) wants to impact.

Use the design and development cycle template to align on the learning solution objectives
- Reaction (Level 1) is standardized through the LES template.
- Fill in Learning, Application and Behavior, and Impact (Levels 2, 3, 4) with stakeholders.

Evaluation Strategy

After choosing your Learning Solution Objectives, it's time to fill out the Evaluation Strategy table.

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Level of Evaluation	Method	Goal		Actual
Level 1: Reaction	LES	> 80	▾	
Level 2: Learning	WalkMe Completion Goal	> 80%	▾	
Level 3: Behavior	WalkMe Behavioural Goal	> 80%	▾	
Level 4: Results	Design Time	< [...]	min	
	Delivery Time	< [...]	min	
	AHT	▾		
Level 5: ROI	ROI on WalkMe vs. traditional <			
	ROI on WalkMe			

Fill out the goals for each level of evaluation. During the Analyze phase of your WalkMe project, you will come back to this table to review the Actual results and evaluate the success of your WalkMe solution.

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Solution Discovery

You have now identified the User Stories and the Learning Solution Objectives - the next step is to discover the WalkMe solution you will build out.

Solution Discovery	Identifying the WalkMe Solution			
	# Solution	Build Time (mins)	Total (mins)	*Actual*
	0 ▾ ShoutOut	30	0	
	0 ▾ Smart Walk-Thru	90	0	
	0 ▾ Smart Tip	10	0	
	0 ▾ Launcher	30	0	
	0 ▾ Survey	30	0	
	0 ▾ Menu	15	0	
	0 ▾ Widget	15	0	
	Total		**0**	

Fill out the **Solution Discovery** section in the WalkMe Design & Development template to identify the WalkMe apps you plan to utilize to achieve your Learning Solution Objectives. The following matrix can help you choose the right WalkMe apps to achieve your goals:

Root Cause	Project Need	Suggested WalkMe Solutions
Users don't know how to start the process	We need to navigate users through a process	Smart Walk-Thru & Launcher
Users can complete the process, but with errors	We need to provide guidance or validate fields within a process	SmartTips Launcher & Smart Walk-Thru
Users are not seeing important company or site announcements	We need to communicate information to users quickly	ShoutOut
Users are confused by website elements	We need to provide additional guidance	SmartTips
Parts of the page/site are being deprecated	We need to block users from entering, saving, etc.	Smart Walk-Thru & Launcher (Invisible)

Increase the speed/ accuracy of a process	We need users to navigate the correct website or tool	Shuttles

Dos and Don'ts when Solutioning

Do	Don't
Consider the action or goal when building	Only use Walk-Thrus to solve all problems
Think about how urgent or significant a process is	Create solutions before you know the prob
Review your work and think of how you c diversify your solution	Over complicate your strategy or solution
Think about how you're going to maintain solution	
Be agile and ready to shift your strategy	

Solution Sign-Off

You completed the Problem Discovery by identifying User Stories, setting Learning Solution Objectives and choosing your Evaluation Strategy. Based on your Problem Discovery, you identified the WalkMe Solutions that will address the problem and help achieve your identified goals.

Now it's time to get sign-off on your solution, before moving to the Build phase. Make sure the following stakeholders sign-off:
- Program Manager
- Subject Matter Expert (requester of the solution)
- Lead Instructional Designer

Build

The Build phase of your project consists of 5 stages:
- Design
- Development
- QA
- Translations
- Go/No Go Decision

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Design

[Resource] WalkMe Figma Project

WalkMe Editor Folder Structure

Currently, WalkMe does not offer sub-folders. In place of this we have a specific naming convention to keep folders of the different solutions created by central and regional teams organized.

<mark>"Tool Name" > "Region" > "Learning Solution Name"</mark>

WalkMe Editor Example

Bliss: WalkMe Applications

[Resource] Design Standards per Tool Template
[Resource] Bliss Mockups Figma File
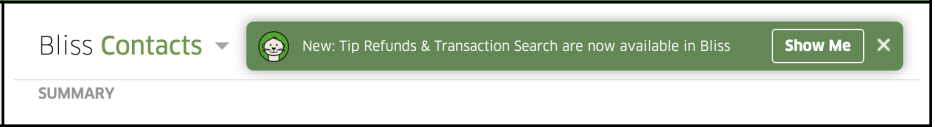
Below are WalkMe Design Standards for Bliss. WalkMe consists of a suite of applications that can provide different learning experiences and solutions. Follow these standards when designing your WalkMe solution.
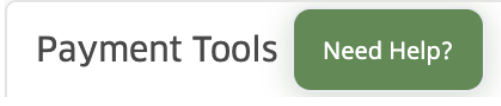
[Video] Bliss Solution Demonstration

Smart Walk-Thru

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Bliss Smart Walk-Thru	
	Please navigate to a Rider profile Guidance will continue from there. **NEXT ▶** 1.
	TRIPS PAYMENT RISK **Click Payment** By WalkMe 2.
	This is the Payment Tools widget. With this widget you can: • Review Transaction History • Refund a Tip • Search for a Transaction **NEXT ▶** 3.
	Review Transaction History You can review the transaction history of the current Rider under 'Spender Transaction History'. Click on the transaction to review: • Orders • Authorization Holds • Charges • Refunds Date Range JobUUID: c87e8520-f690-44c4-90b8-4eca7b86b6b4 Orders Table 	Date Created	Amount	Order Type	Order Uuid
Mar 17, 2020, 9:17 PM GMT+1	-5	Tip Order (Tip)	32c48144-235c-3338-bc17-f975111163ce
Mar 17, 2020, 9:16 PM GMT+1	-43.66	Trip Completed Order	9a684ee4-7a41-32e1-b518-54321564abee | Auth Table | Date Created	Date Updated	Amount	Gateway	Auth Type	Auth UUID	Status | No data available **NEXT ▶** 4.

Solution Description	Use step-by-step balloons. Guide learners to the correct tab in Bliss th should be working in. Highlight relevant information in order to comple process. **Design Language used:** Smart Walk-Thru templates available in Walk Editor, Helvetica font, Color #588A50 `Green`, Image (4) shows Gif (Not recommended)

Application	WalkMe Template ID	Goal	User Guidance	Best Practices

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Smart Walk-Thru		Demonstrate to learners how to complete a process	Reveals a step-by-step process using balloon steps to guide the user (Refer to the Balloon Conventions)	Limit walkthrough steps to 2 to 3 (max 10 or less). The last step should complete resolve an action. Flag the crucial steps / information for users, but don't try to account for every possible question, path, behavior, detail. Add the LES at the end of a walkthrough to collect learner feedback. Set appropriate goals in order to track learner completion. (Refer to Track Learner Achievements)

ShoutOut (Classic)

Bliss ShoutOut	Bliss **Contacts** ⌄ 🦦 New: Tip Refunds & Transaction Search are now available in Bliss [Show Me] [×] SUMMARY
Solution Description	Uses a banner balloon. Placed in the empty space above contact summary (top-left of the Bliss webpage). Clicking "Show Me" launches Smart Walk-Thru. **Design Language used:** ShoutOut (Classic) template available in WalkMe Editor, Helvetica font, Color #588A50 Green, Bliss Otter Icon (included in template)

Application	WalkMe Template ID	Goal	User Guidance	Best Practices
ShoutOut		Notifies learners of important information, prompting them to take action (dismiss, done, learn more, etc)	Uses a notification balloon to be more visible to learners to react. Similar to a fullscreen or a banner on your mobile device. (Refer to the Balloon Conventions)	Use when you want learners to stop and interact in order to launch the learning solution. Only interrupt someone's workflow when it is vital to making their next decision

SmartTips

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Bliss SmartTips	Refund Tips directly from the Payment Tools Widget.			
Solution Description	Uses a SmartTip balloon with a question mark icon. Place next to a fie text to provide definition/answers to FAQ. **Design Language Used:** SmartTip Balloon template available in Walk Editor, Helvetica font, Color #588A50 Green, Question Mark Icon (inclu template)			
Application	**WalkMe Template ID**	**Goal**	**User Guidance**	**Best Practices**
SmartTips		Provides contextual information to learners by adding useful tips at their point of need.	Customizable balloon to quickly deliver information related to on-screen elements. (Refe to the Balloon Conventions)	Use it to highlight a new feature that does not require a walk-thru, expla a term or phrase, for field that are incorrectly used users to change behavior

Launcher

Bliss Launcher	Payment Tools Need Help?			
Solution Description	Places Launcher button near the new Payment Tools Widget. When cl relaunches the Smart Walk-Thru previously launched by the ShoutOut **Design Language Used:** Launcher button template available in WalkM Editor, Helvetica font, Color #588A50 Green			
Application	**WalkMe Template ID**	**Goal**	**User Guidance**	**Best Practices**
Launcher		Learners can launch contextual help by clicking on a button.	Customizable call-to action buttons (to launch Smart Walk-Thrus, SmartTips)	Allow learners to relaunc a Smart Walk-Thru. Place only one Launcher per page.

Widget and Player Menu

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Bliss Widget and Player Menu	Current Version
	NEW CONTACT
	restaurant? : P2P Driver
	Wanted to remove the UberEats option permanently
	Wanted to remove the UberEats option permanently
	TO **OPEN** ✓
	🍄 **How can we help you?** English ▾ ✕
	Type in your question...
	Payment Tools
	ER.COM
	SKIP
	[ARCHIVE] Version 1
	🍄 **How can we help you?** English ▾ ✕
	Type in your question...
	Payment Tools Navigation
	Review Rider Transaction History
	Refund a Tip
	Search for a Rider Transaction
	❓
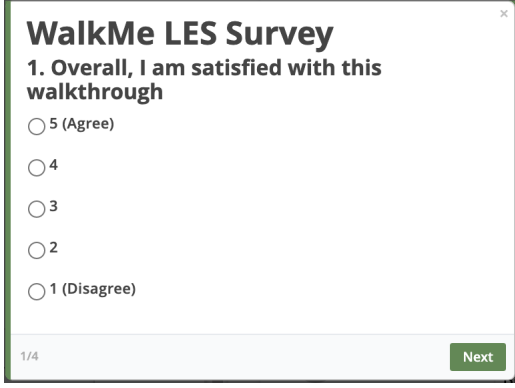
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| Solution Description | Question Mark Widget was originally placed in the lower left corner of webpage but interfered with other learner use cases. Changes will be implemented soon. When the widget is clicked it launches the player r learners can replay available Smart Walk-Thrus.

Design Language Used: Widget template and Player menu template available in WalkMe Editor, Helvetica font, Color #588A50 Green, Que Mark Icon (included in template) | | | |
|---|---|---|---|---|

Application	WalkMe Template ID	Goal	User Guidance	Best Practices
Widget and Player Menu		Gives learners access to all available WalkMe solutions from one location.	Always availabl button/widget that learners can access to see a menu of learning content.	Include relevant Knowledge Base articles Support logic, FAQ, etc., that support WalkMe learning solutions. Continuously audit when adding new content to maintain relevancy.

Shuttle

Shuttle	[Screenshot TBD]
Solution Description	Shuttle is part of the ShoutOut banner, "Show me" button navigates u Knowledge Base to review taxonomy updates.

Design Language Used: Helvetica font, Color #588A50 Green |

Application	WalkMe Template ID	Goal	User Guidance	Best Practices
Shuttle		Quickly and easily redirect users to resources/ websites/tools that are several clicks away	Buttons that ca be included in other WalkMe apps or stand alone to navigate users to another page in a window or new tab.	Use shuttles when navigating to Knowledge Base or resources require reference for users to properly perform a task o complete a process.

Survey

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LES Survey	**WalkMe LES Survey** **1. Overall, I am satisfied with this walkthrough** ○ 5 (Agree) ○ 4 ○ 3 ○ 2 ○ 1 (Disagree) 1/4 Next ×			
Solution Description	LES prompts learners to complete at the end of Smart Walk-Thru. It in[cludes] 4 questions, 3 likert scale questions with1 fill-in-the-blank question. **Design Language Used:** LES template available in WalkMe Editor, He[...] font, Color #588A50 Green			
Application	**WalkMe Template ID**	**Goal**	**User Guidance**	**Best Practices**
Survey		Gather feedback from learners.	Use surveys to gather feedback from learners.	Use Learning Experience Survey (LES) template at the end of a Smart Walk-Thru. Use simple reaction (like/dislike) to allow learners to rate other guided help like SmartTip[s] [Using Uber's Customize Design for Surveys]

After building out a 'skeleton' version of your WalkMe solution, request sign-off on this Alpha version by:
- Program Manager
- SME
- Lead Instructional Designer

Development

During the Development stage, incorporate the feedback that you received on the Alpha version. Check your solution against the QA Checklist. Push the updates to the Test Environment, and ask the following stakeholders to sign-off:
- Program Manager
- SME
- Lead Instructional Designer
- WalkMe Program Manager

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Quality Assurance (QA)

[Resource] WalkMe Design Review Checklist
During Quality Assurance, the Lead Instructional Designer and WalkMe Program Manager will review your solution with the QA Checklist. After the review is completed, adjust your solution based on the feedback.

Translations

Once you incorporate the feedback post-QA, the solution is ready to send for translations. The L&D Coordinator will request translations and upload them to WalkMe.

[insert SOP for translating WalkMe]

Go/No-Go Decision

After passing QA, make the Go/No-Go decision with the following stakeholders:
- Program Manager
- SME
- Instructional Designer
- Lead Instructional Designer

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Deploy

After the Build phase, it is time to Deploy the WalkMe solution to learners. The WalkMe Program Manager will [publish the Final Build to Production](#).

Make sure to communicate the WalkMe solution before deployment to regional delivery teams.

Analyze

Plan a Post Mortem one month after deployment with the following stakeholders:
- Program Manager
- SME
- Instructional Designer
- Lead Instructional Designer
- WalkMe Program Manager

During the Post Mortem, the Program Manager will report on the Success Metrics listed under 'Evaluation Strategy' in the Plan section of the WalkMe Design & Development Template.

Discuss:
- Which goals were achieved?
- Which goals were not achieved?
- What should we continue doing for future solutions?
- What should we stop doing for future solutions?
- What should we change in the current WalkMe solution based on the success metrics?

[insert more details on Post Mortem after automated WalkMe dashboards are set-up by Blanka]

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Resources

Design Resources
- [WalkMe Design and Development Cycle](#)
- [WalkMe University](#)
- [WalkMe Support - Design and Customization](#)
- [Figma - WalkMe Design Master](#)
- [WalkMe Playbook](#)

Appendix

Our Principles

Find the time

Identify when and where do learners typically experience gaps or obstacles in their workflow that can be solved with a learning experience. Our aim is to identify the best opportunities to educate and provide content that is available at all times bridging the gap between learning and doing.

Why find the time?
The learning experience should be designed to be friendly to the context - it should not require constant context shifting for the learner.
- [[Source: Forbes](#)] **Context shifting:** Frequent context shifts throughout the day can be extremely distracting and impair your ability to concentrate. Worse, over time they can seriously deplete your brain's ability to concentrate and make decisions. Ever wondered why, no matter how much you slept the night before, you can't focus on anything by 4 p.m.? It's because you've been shifting all day between meetings, e-mails, voicemails, hallway conversations, phone calls, and different types of tasks all day.
- Here's how this looks in practice:
  - Focusing on one task at a time = 100% of your productive time available
  - Juggling two tasks at a time = 40% of your productive time for each and 20% lost to context switching
  - Juggling three tasks at a time = 20% of your productive time for each and 40% lost to context switching

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Find the access

Identify how will learners simply and conveniently access the training and resources within their workflow and preferably through tools they already use. Our aim is to empower learners with the ability to find the answers that they need on their own (building their autonomy).

Why find the access?

[Source: Josh Bersin] Learning in the flow of work offers support through bite-sized content (microlearning) to learners in their time of need and how they want it delivered.

Micro-Learning	Macro-Learning
I need help now.	*I want to learn something new.*
• 2 minutes or less • Topic or problem based • Search by asking a question • Video or text • Indexed and searchable • Content rated for quality and utility	• Several hours or days • Definitions, concepts, principles, and practice • Exercises graded by others • People to talk with, learn from • Coaching and support needed
Is the content useful and accurate?	*Is the author authoritative and educational?*
Videos, articles, code samples, tools	*Courses, classes, MOOCs, programs*

Find the value

Identify what training activities will fit into a learner's workflow and deliver clear value in order to motivate the learner to return and make training a daily habit. Our aim is to provide content that is carefully curated and its quality verified allowing learners to make thoughtful and considered decisions while on the job.

Why find the value?

[Source: LinkedIn Learning] Learning at work, at their own pace, and in their time of need is what learners find valuable. A learning experience designed for in the flow of work provides a solution that garners buy-in from learners.

68% OF EMPLOYEES PREFER TO LEARN AT WORK

58% OF EMPLOYEES PREFER TO LEARN AT THEIR OWN PACE

49% OF EMPLOYEES PREFER TO LEARN AT THE POINT OF NEED

[Source: 702010 Institute] Learning in the flow of work also supports the 70-20-10 model. Rather than relying on formal instruction to educate learners on new features, processes or

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skills it allows them to support themselves in context and allow them to reference and share materials supporting their colleagues.

70-20-10 Model
- 70% of learning comes from experience, experiment and reflection.
- 20% derives from working with others.
- 10% comes from formal interventions and planned learning solutions.

WalkMe Component Best Practices

Balloons

Note: *Use Balloon style "Classic"*

Balloon Direction and Placement
When positioning balloons in a Walk-Thru, ShoutOut, and SmartTips, keep in mind these tips:
- If the instruction in a balloon indicates that the learner needs to click on a specific button, the balloon should point at that button (vs. at the top of a page where the button is not yet visible to the user).
- Balloons should not cover up fields or search bars that the user needs to see.
- Balloon steps positioned on the left or right edges of a page can sometimes get cut off, depending on the different screen sizes that your end users may use to access your site or application.

Balloon Text
- Keep text concise and readable - to keep text easy-to-read, conversational, and understandable maintain a grade 6 reading level (Flesch–Kincaid readability score). A handy resource to test your text's readability score is the [Hemingway Editor](#).
- For the text contained within your Smart Walk-Thrus, Launchers, and SmartTips, try not to exceed 12 words (as a general guideline).
- If instructions reference three or more items, consider using bullet point lists with action-oriented pieces of information.

Balloon Content Hierarchy
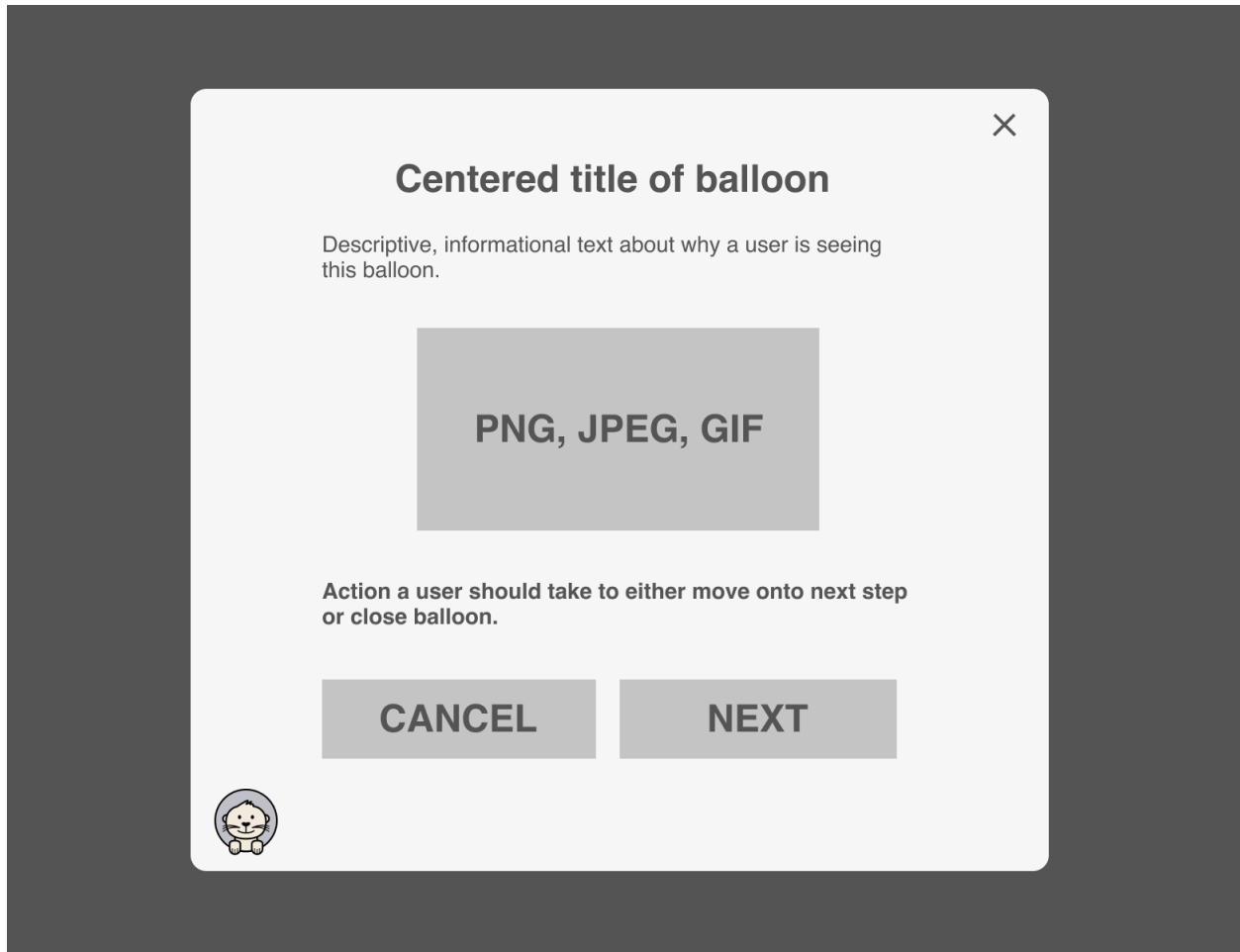
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Braintree Example (Content Hierarchy)

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Error Messages

- Decrease user frustration by reducing the number of potential errors through validation SmartTips, a "Check My Form" Launcher, or applying a required field SmartTip or Launcher. For external sites, this can help with usability of site and retention; for internal sites, this can increase productivity and decrease the amount of time spent completing a process.
- If an action results in a page error, include a useful error message in your SmartTip validations that provides clear instructions on how to resolve the problem.
- For example,

- Example (Bad) : Date of birth is incorrect
- Example (Good): Please enter date of birth in the following format: DD/MM/YYYY

Reading patterns

Place content where your learner is likely to notice it first based on their reading pattern. Consider these patterns when deciding how to balance other content your learner may need to see with access to guidance. Nielsen Norman Group showed that users often read web pages in an F-shaped pattern:

1. First, in a horizontal movement(across the upper part of the content area)
2. Next, in a second horizontal movement (users move down the page a bit and then read across in a way that covers a shorter area than the previous movement)
3. Finally, users scan the content's left side in a vertical movement

Target Audience

- Use Segmentation [WalkMe] to decide when to display your WalkMe solution to learners using different "use cases" and to push items to specific users or to remove items from a user's view according to the segmentation.
- Specific in language and instructions for specific learners

Appear at the right time

- Using the Rule Engine to determine when a WalkMe item appears (e.g., only on a specific page if a specific condition is met)
- Setting a variable to check whether this is the user's first time logging in
- Configuring Auto Play Rules based on a variable (such as the number of days left in a free trial or a specific date range
- Including a clear "call to action" is one of the most effective ways to ensure that your users take note of available guidance and engage with it. A "call to action" invites the user to accomplish a specific task (e.g., "Show Me How"; "Check My Form"; "Give Feedback").

Track Learner Achievements

- Set 'Goals' - Goals are used in WalkMe to quantify success and understand user behavior within Insights (WalkMe's analytics platform). Using Goals, you can view not only how many times a Smart Walk-Thru, Resource, Shuttle, ShoutOut, or Onboarding Task has been played, but also if the user completed the process on your site
- Refer to WalkMe Playbook How-to-Guide

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Design Language

[Resource] Design Language Figma File

Disclaimer: DAP Manager and Lead Instructional Designer are responsible for the Design Language for WalkMe. Regional Builders should not change aspects of the Design Language without consulting with one of these leads.

WalkMe CSS (Cascading Style Sheet)

Disclaimer: Do NOT edit WalkMe CSS without partnering with Central Learning and Development. Editing CSS in templates may affect other learning solutions.

Hierarchical Override Note
- BBcode > Individual Element > Global CSS
- Global CSS Tutorial Video

Custom Design CSS for Surveys

- Survey CSS Tutorial Video
- How to use surveys with custom CSS:
  1. First, duplicate the survey template.
  2. Rename the survey based on the name of your learning solution.
  3. Copy and paste the survey CSS into a text editor.
  4. Edit the "Custom NPS Survey Styles" CSS for your newly renamed survey - replacing the ID number with the current ID you just created.
  5. Copy and replace the CSS in the survey you are building with the edited CSS.
  6. When completed with customing CSS preview/publish the survey.
     Note: *If you just want to edit CSS for one question in the survey please watch the full tutorial video.*

Designing Components

Use best practices outlined in the design standards when creating components so they can be:
- **Lightweight** - do not interfere with a service/tool from loading or agents workflow
- **Reusable** - other service/tools/designers can leverage the design

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Icons

Type	Example	Conventions
General Information	Produce at least two sizes for your icons to be used in WalkMe. Recommended sizes: • 16x16 pixels • 34x34 pixels	
System/Tool	Design a friendly and recognizable icon that relates to the context of th service/tool.	
Question Mark	A question mark next to a field typically provides a definition. Use this an end user encounters a field and may wonder, "What's this?"	
Information	An information icon typically provides a specific type of guidance, suc caveat around the format of required data input or additional informati end user may need to provide.	
Exclamation	An exclamation point icon should be used if/when there is a strong wa associated with a field – for example, if you are warning the end user r do something.	

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Colors

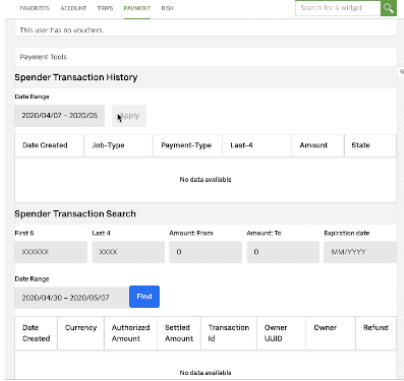| Type	Example	Conventions
General Information	- Use colors that integrate with the service/tool - Maintain the color HEX is consistent throughout the design - Break these rules when it makes sense (critical updates, priorit specific workflow learning) according to the color themes appr for service/tool - Use colors that contrast with the native color scheme of your s application when heightened attention is needed. Use these to [Adobe Color Wheel](#) or [other sites](#) to easily find a high contrast, complementary color to your site.	
WalkMe Example	Be sure that the text color stands out against the balloon background s is legible. ([Refer to ShoutOut](#)) **Bliss System Color:** #588A50 `Green`	

Colors

Warning	Caution	Success	Hyperlink

Red	Equates to warning; danger; error message; mandatory field (Refer to Braintree example below)
Yellow	Equates to approach / proceed with caution
Green	Equates to success; a process completed; corrected error
Blue	(Accompanied by an underline) equates hyperlink

Braintree Example

Uber

⚠ **New: Tip Refunds & Transaction Search are now available in Bliss** | Action

Media

Disclaimer: Avoid the use of media as much as possible. Instead build a walkthrough that guides the learner how to do something in the actual tool. If you need to use media be mindful of the media size because user bandwidth varies depending on region.

Type	Example	Conventions
Images	EXAMPLE TBD	• Keep size of images under 500KB • Maintain dimensions between 500x500 pixels • If using an image provide text descriptions and step-by-step instructions
Gifs		• Gif use is NOT recommended • Keep size of image under 500KB • Maintain dimensions between 500x500 pixels • Note: Quality of gif at this size is a poor learner experience
Videos	EXAMPLE TBD	• Video use is NOT recommended • Videos must be hosted outside of WalkMe like YouTube, Vidyard, Sprout, etc • Poor learner experience based on varied bandwidth per region • Not limited by size or dimensions

Uber

Fonts

Type	Example	Conventions
General Information	Most end users tend to skim for key information. Use text styling to dr eyes toward important words within a sentence that the user should fo (for example, bolding or italicizing words like "Do not" or "Don't forget	
	# Fonts Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim. **Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim.** **Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim.** **Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim.** **Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim.** **Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed non nibh id diam aliquet dignissim.**	
Font Style	- Smallest font size to use is 9 - Font style should be Helvetica - When Helvetica is not available use a [Web Safe Font](#) like Arial	