

2024 KaiNexicon

# BUILDING USER KNOWLEDGE WITH WALKME INTEGRATION

Jack Henry



**Bekah Dempsey**

Senior Business Process  
Analyst



**Brian Molgaard**

Business Process Analyst,  
Senior Advisor

# About Jack Henry

Jack Henry is a financial technology company founded in 1976 in Monett, Missouri. It provides technology and service solutions to financial institutions and fintech companies across the United States.

**Jack Henry** has over **7,000 associates** and **40+ offices nationwide.**

**jack henry**<sup>TM</sup>

# Mass Activation Project – Kata Style

## Focus Process:

Growing associate usage of the Continuous Improvement Management System (CIMS – what our instance of KaiNexus is named)

## Current Condition:

- 700 out of 7,000 associates enrolled (10%)

## Obstacles:

- Slow adoption
- Unaware CIMS exists

## Experiments:

- Interacted with various parts of the business for engagement
- Identified users to include in the mass activation project
- Communication shared on the company intranet site of activation date and expectations

# What We Learned



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- **1,500** out of the **7,000 users** are using the system, essentially doubling the amount of users
- We did run into a communication barrier and learned most of the company does not read our intranet site
- Our Anti-Spam team would have benefited from knowing the details of the activation project beforehand, as they were inundated with emails

# WalkMe Idea Submission Integration

Now that we have all these new users, we needed to find a way to be a resource and help them through the first step of utilizing CIMS, the idea submission process

### Create Idea

Title:  
  
ⓘ This field is required.

Process or type of work you are doing:

What is not working the way you think it should?:

What do you think we should try doing?:

Why is this important?:

How would you measure success?:

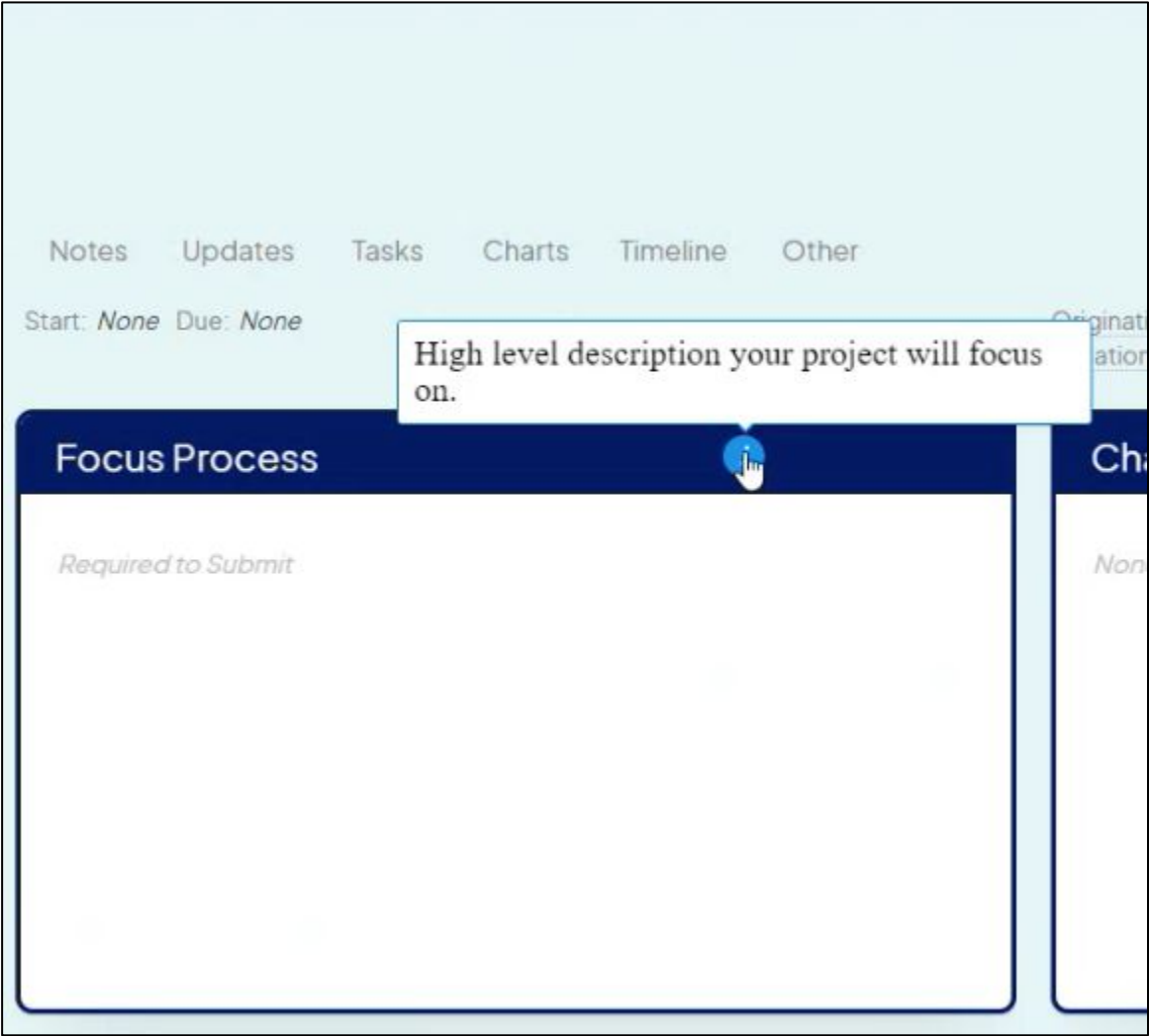
You must comply with all applicable Jack Henry policies when using KaiNexus including the Enterprise Data Privacy Policy and Acceptable Use Policy. As a reminder, do not include customer data or any data classified as Tier 1 under Jack Henry's Data Classification Policy under any circumstances and Tier 2 data should only be provided with the consent of your manager.

# WalkMe Idea Submission Demo

The screenshot displays the WalkMe Idea Submission web interface. At the top, there is a navigation bar with the 'jh' logo, menu items for 'Boards', 'Items', 'People', 'Reports', and 'Admin', a green 'Create' button, a 'Need Help?' button, and a search field. Below the navigation bar, the main content area is titled 'My Board'. A blue header bar indicates '(87) My Activities'. The main area contains a list of activities, with a vertical label on the left side that reads 'Activities I am Participating In'. The list is partially blurred, but some columns and rows are visible, including a date column on the right side showing years like 2021, 2022, and 2024.

# WalkMe Storyboard Integration

Adding the ToolTip functionality to each card within our storyboards serves as a helpful reminder for the improver of the activity on what all the different steps of the Improvement Kata are.



# WalkMe Additional Resources

The screenshot displays the jh CIMS interface for a 'Test' item (#2916226). The top navigation bar includes 'Boards', 'Items', 'People', 'Reports', 'Admin', and a green 'Create' button. The main content area is divided into several panels:

- Work Stream:** Contains 'Work Stream' (None), 'OJHOI Responsible Committee(s)' (None), and a 'Priority' section with options for Critical (red triangle), High (orange arrow), Medium (yellow square), and Low (green downward arrow).
- Focus Process:** Shows 'Required to Submit'.
- Challenge:** Shows 'None'.
- Current Condition:** Shows 'None'.
- Target Condition:** Shows 'None'.
- (0) Obstacles:** Shows 'No results matched' and a '+ Quick Create' button.

On the right side, a help sidebar titled 'How can we help you?' is open, featuring a search bar and several resource categories:

- Walk-Thru Assistance:** Includes 'Create Idea' and 'Create Feature Canvas'.
- Video:** Includes 'Idea Submitter Training Video'.
- Written Documentation (Kata):** Includes 'Storyboard', 'Focus Process', 'Challenge', 'Current Condition', 'Target Condition', 'Obstacles', and 'Experiments'.
- Written Documentation (Standard Wo...):** Includes '5 Whys', 'Fishbone', 'PICK Chart', and 'SIPOC'.
- Written Documentation (All):** Includes 'CIMS Full Help Document'.