



Whatfix

Accelerate Workflows and User
Productivity with Whatfix AI

Contact:

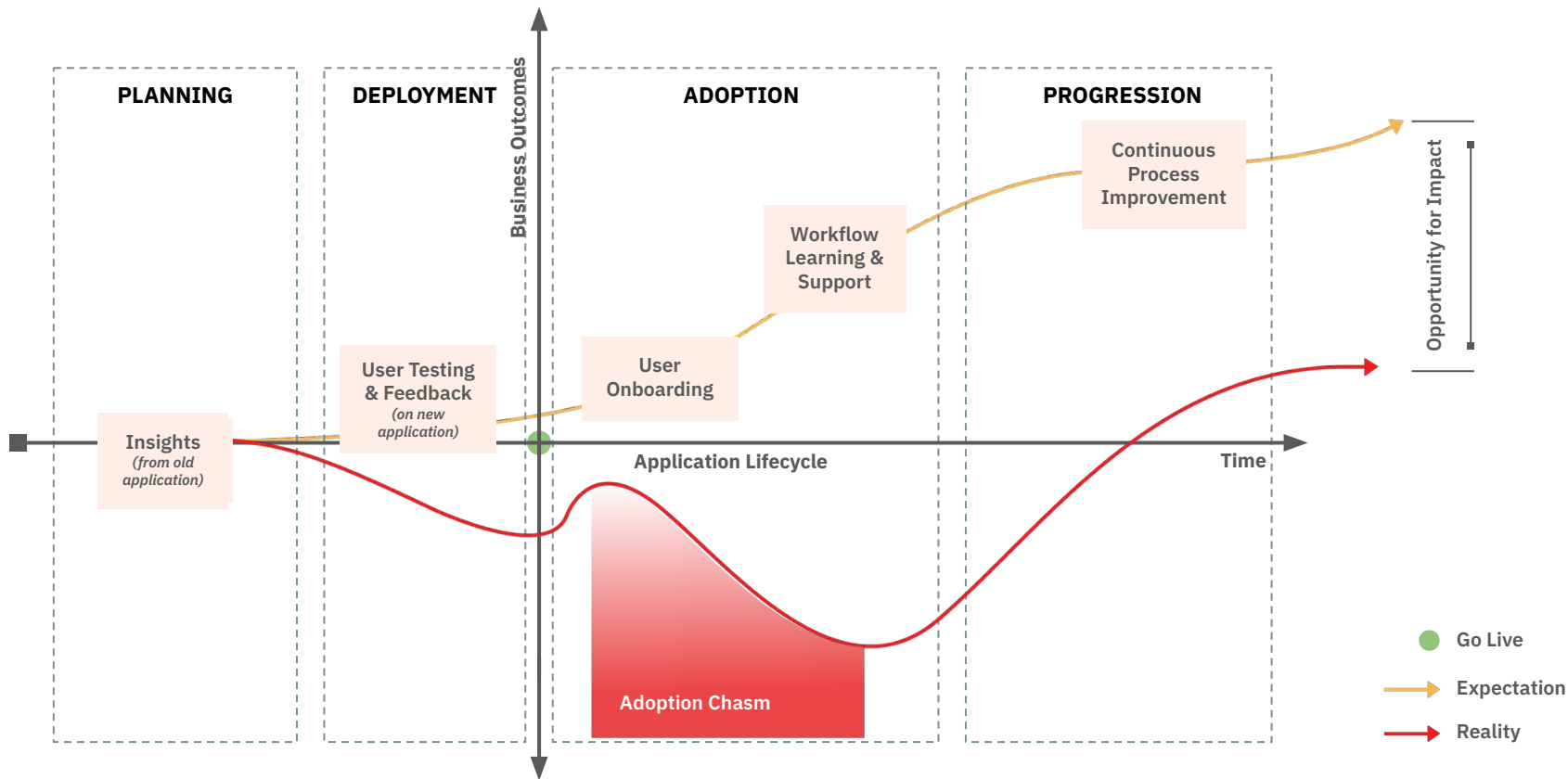
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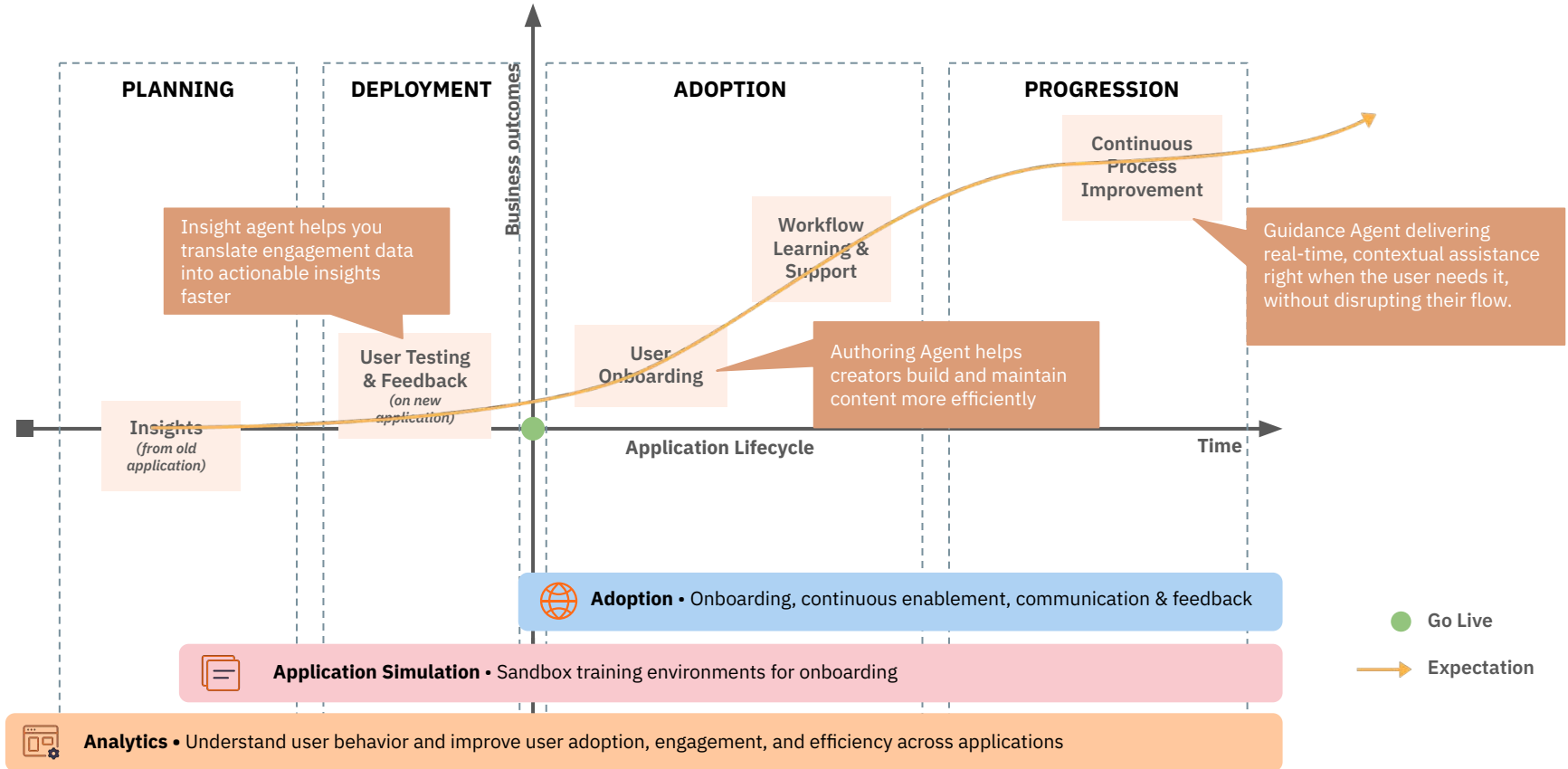
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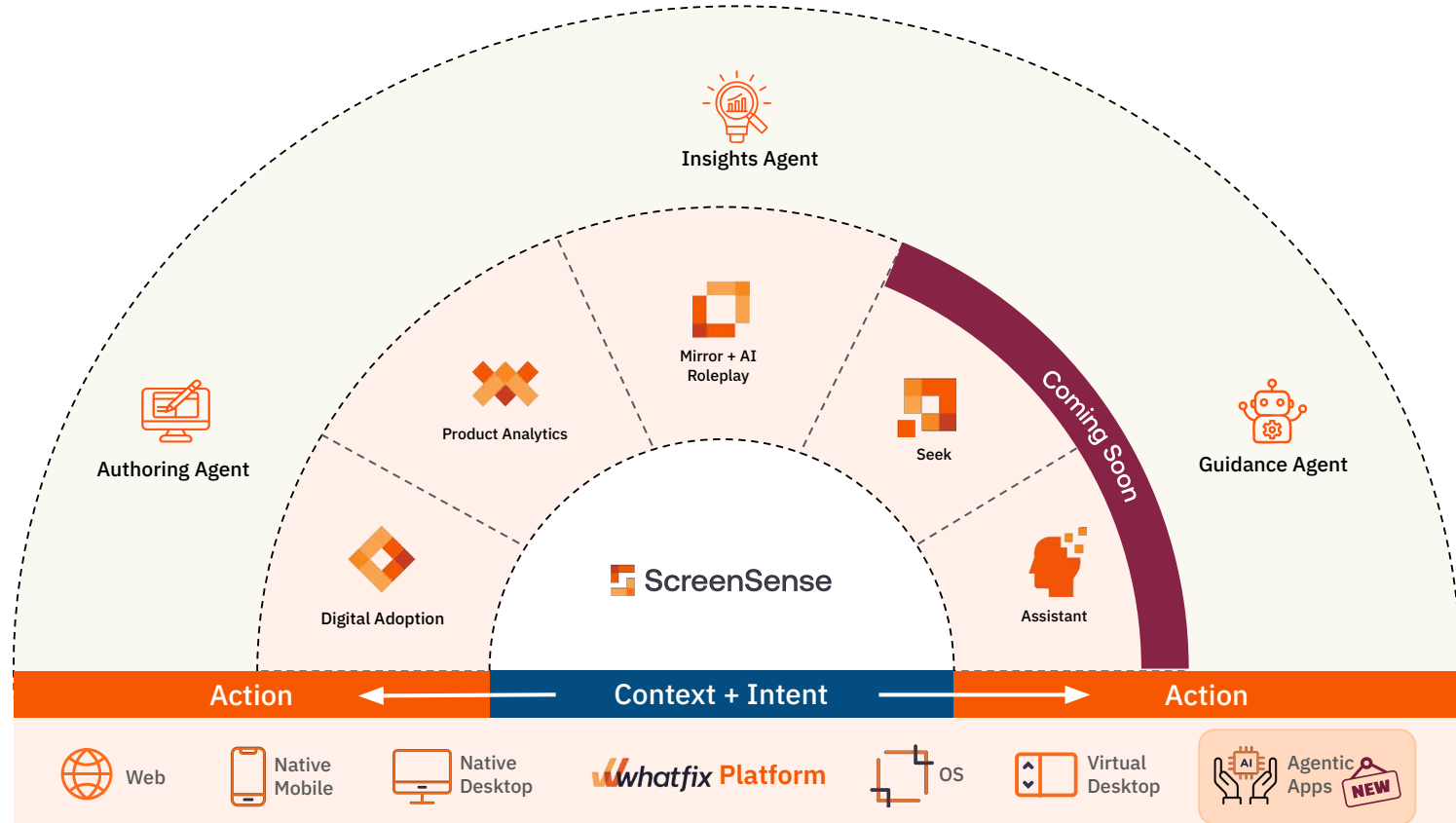
Every Application deployment goes through this journey



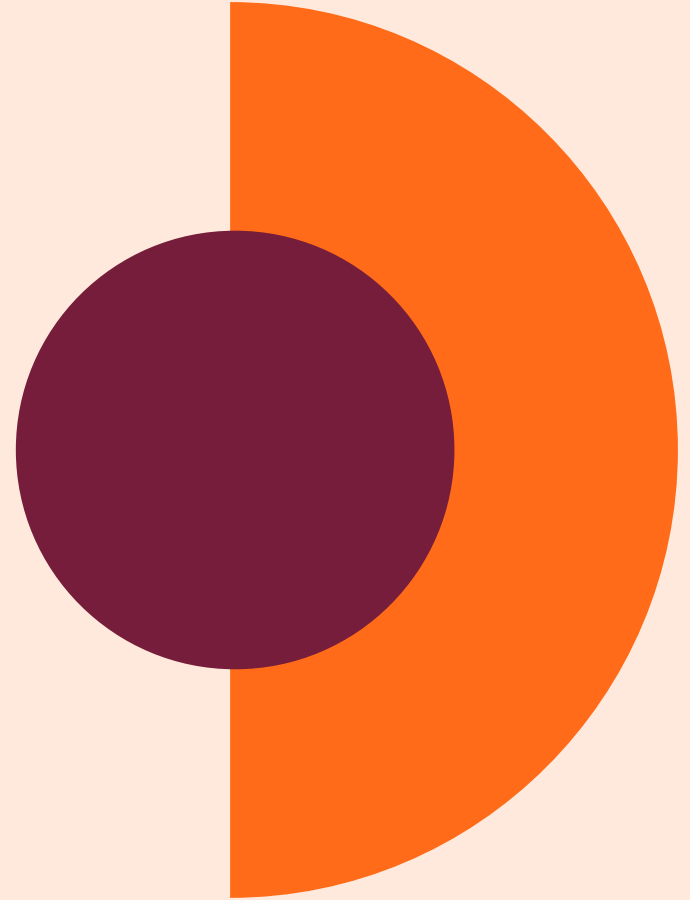
Whatfix's product suite can help enable better business outcomes



Whatfix AI - Roadmap to solve high-impact enterprise challenges



About Us



Whatfix is the leader in the DAP category

700+
Customers

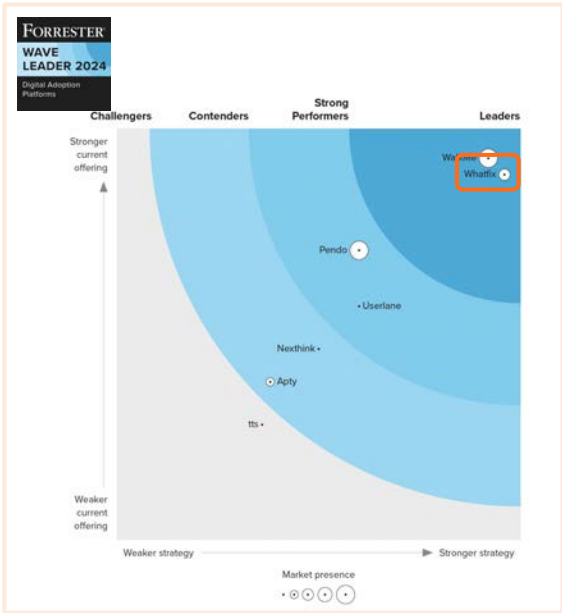
80+ Fortune 500 Accounts
Customers in 30+ Countries

100+
Partners

Global Systems Integrators &
Independent Software Vendors

11

Patents Granted
And 11 Pending, Whatfix fuels
innovation that drives the category



Trusted by companies across industries

Technology



Healthcare & Pharma



Financial Services



Consumer Products



Auto & Aerospace



Business Services



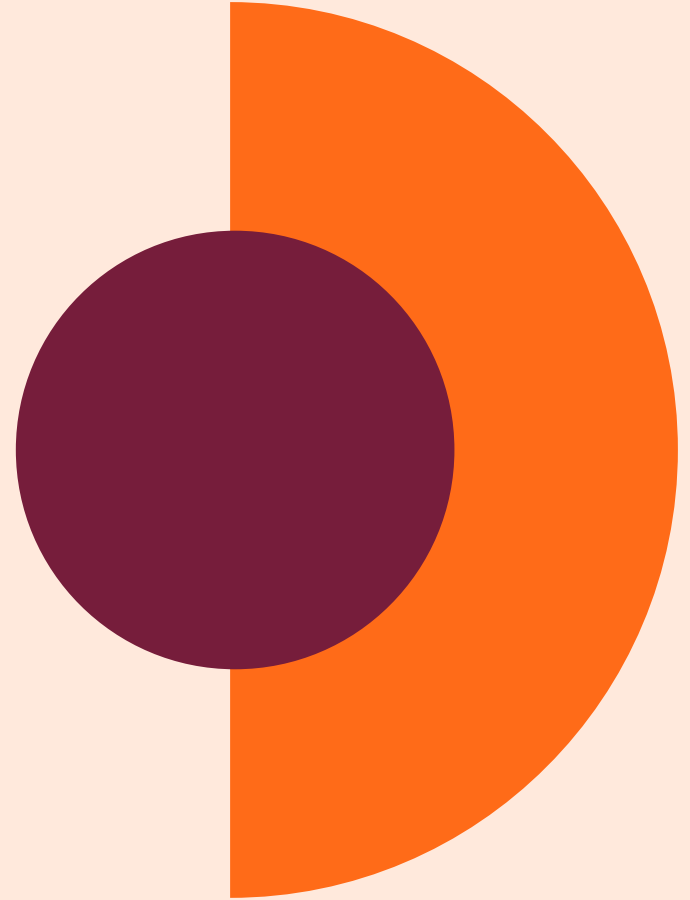
Logistics, Travel & Hospitality



Manufacturing / Oil & Gas



The Whatfix Impact





Microsoft Drove a 6x Copilot Adoption Surge with Whatfix

Industry

→ Technology

Region

→ Global

Whatfix Solutions



DAP on Web

→ Microsoft Dynamics 365

THE CHALLENGE

- **Change Resistance:** Sellers were unfamiliar with AI workflows, leading to low Copilot adoption and usage.
- **Limited Awareness:** Users lacked clarity on how and where to use Copilot within Dynamics 365 workflows.
- **No Usage Visibility:** MSX had no effective way to measure adoption or link Copilot to ROI, resulting in underutilization and lost value.

THE SOLUTION

- **Contextual Guidance:** Delivered Smart Tips and Flows within Dynamics 365 modules such as Opportunities, Leads, Strategy Map, and Partner records to guide sellers on when, where, and how to use Copilot effectively.
- **Hover-Triggered Tool Tips:** Embedded Copilot-branded Smart Tips next to strategic fields that dynamically summarized key account insights and recommended contextual prompts.
- **In-App Education:** Provided real-time onboarding and feature discovery within the workflow, reducing dependency on external training.

KEY RESULTS WITH WHATFIX

- 89% of Copilot prompts triggered were directly the result of Whatfix in-app guidance.
- In only two weeks, the MSX team experienced a 6x increase in active Copilot users.
- Over the last year, MSX users engaged with Copilot 400,000+ times.



Industry

→ Financial Services

Region

→ US

Whatfix Solution



DAP on Web

→ Multi-app ELA deployment
across **11 apps**



Mirror

→ Multi-app deployment
across **10 apps**

\$14B US Financial Software Enterprise improves Compliance and Accuracy on Key Customer-facing Applications with Whatfix

THE CHALLENGE

- Complex process and sensitive protocols for data management
- Time-consuming training process for contractual employees
- Ineffective training leading to costly errors and poor customer experience

THE SOLUTION

- Enable** low-risk environment for contractual and full-time employee training
- Provide** in-app JIT guidance on all key consumer & employee facing apps to prevent errors and help users navigate to improve productivity

KEY RESULTS WITH WHATFIX

Reduction in error rates

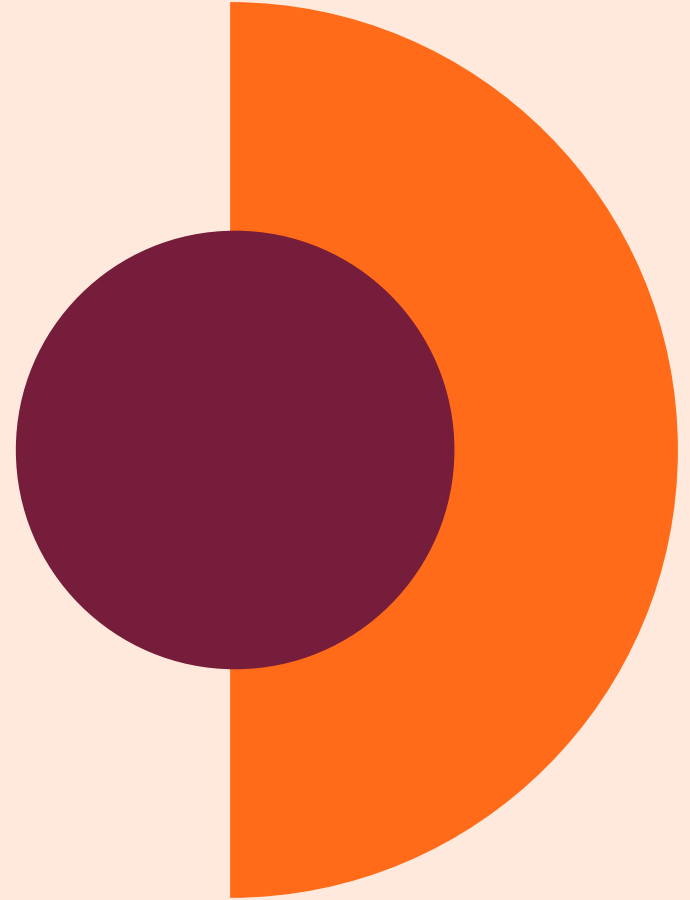
Ensure high volume critical financial transactions are performed with low error rates

Accelerated time-to-proficiency at lower cost

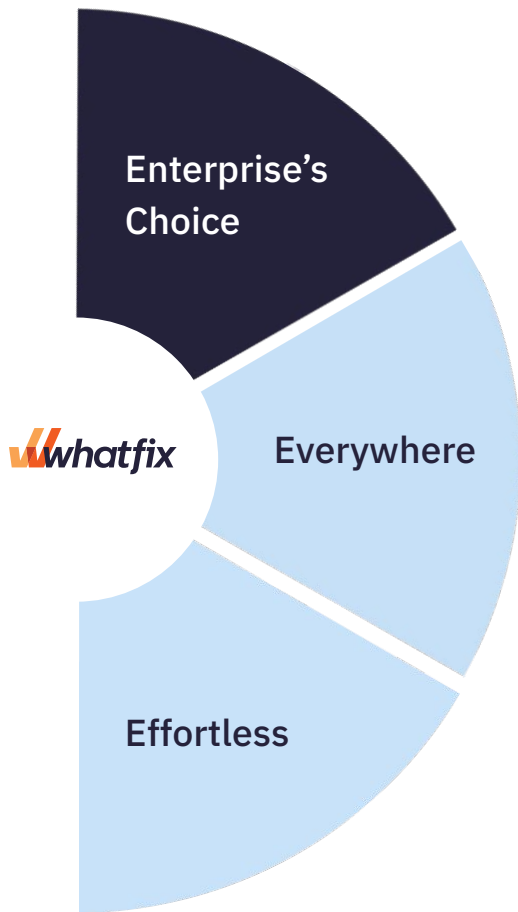
Onboard new users without risk of engaging with live system while reducing IT and support costs



Why Whatfix - in the age of AI



Whatfix product suite is..



1

- Differentiated customer experience **with 99%+ CSAT**
- Established & active co-innovation model with customers
- 50%+ of product roadmap driven by customer feedback

2

- Leader in Gartner® Voice of the Customer Report for DAP Category twice
- Leader in Forrester DAP Wave securing **highest scores in vision and strategy**, with analysts recognizing its **standout features and innovation**.
- Top leader in the IDC DAP MarketScape, highlighting strengths in **AI-driven innovation and analytics**.
- Featured as a Everest PEAK Matrix Leader and Star Performer for the fifth consecutive time, with strengths cited in **partner ecosystem depth**, disaster recovery robustness, broad platform support (including Citrix), and **strong security and data privacy**.

3

- **Transparent Pricing**, Unlimited Customer Support & Training
- Paid Certified Digital Adoption professional support

Whatfix helps you achieve business outcomes...



1

- Products across the breadth of Digital transformation lifecycle coverage (Application Simulation, Product Analytics, Session Recording & DAP)
- Pre-packaged content templates (**Smart Solutions**) for COTS applications across Industries to accelerate adoption

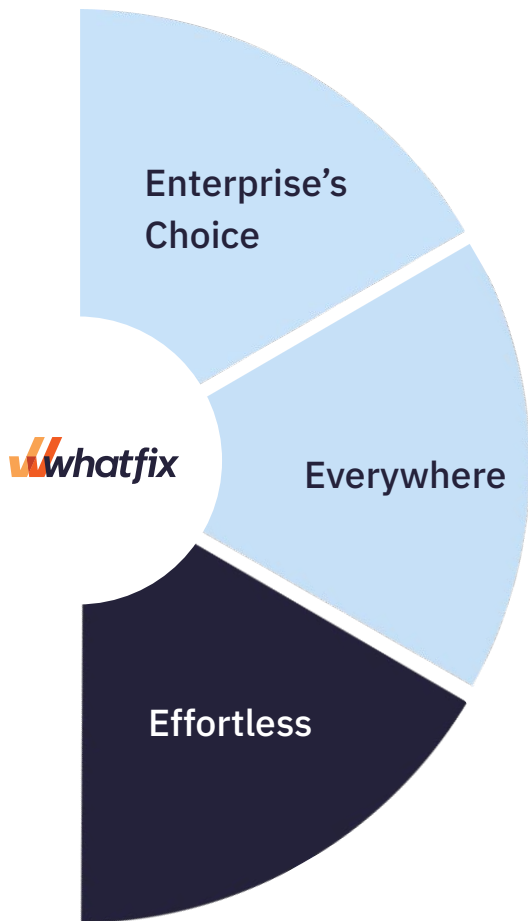
2

- Products covering the application ecosystem breadth across platforms - Web, **Desktop**, Mobile, **Citrix VDI Desktop** with Cross-Application walkthrough support

3

- Comprehensive Hosting options across - Cloud, Self-Hosted and On-premise to conform to varied IT & Security requirements

Whatfix's technology makes digital transformation..



- 1
 - **Patented AI-Powered ScreenSense technology**
 - To streamline Adoption content creation and management leveraging AI based capabilities
 - To deliver instant AI-driven conversational insights into user behavior & engagement with application
 - To save time and cost by quickly creating GenAI- simulation environments for zero risk hands-on user training

- 2
 - Simple adoption content maintenance and seamless user experiences across application upgrades with advanced debugging tools like Diagnostics, Auto-Testing, and Flow on Standby

- 3
 - Content accessibility across user demography with one-click auto-translation & format conversion (Video, PDF, LMS)
 - Ease of information access & usage leveraging AI-powered guidance agent which can auto-sync with content repositories