



Docupace Announces Strategic Partnership With WalkMe

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Partnership aims to drive enhanced user and customer experience through an interactive guide on how to best implement and access Docupace features and capabilities

LOS ANGELES, June 6, 2019 /PRNewswire/ -- [Docupace](#) and [WalkMe](#), the world's first [Digital Adoption Platform](#) and one of the fastest-growing global software companies, today announced a strategic partnership enabling broker-dealers and advisors to easily adopt and implement Docupace into their practices for greater and more efficient service offerings.

WalkMe's platform will enable the creation of interactive, on-screen sequences to guide and engage users of the Docupace platform. Powered by AI and machine learning, WalkMe's context-intelligent algorithm streamlines digital adoption internally and externally, ensuring that the right users receive the most accurate information exactly at the time requested. This partnership will help Docupace customers seamlessly navigate the platform for an optimal user experience.

"Technology is only as good as its end user, and in today's digital world we are committed to empowering users through simplifying their interface experience," said Dan Adika, CEO and Co-founder of WalkMe. "Docupace's goals to increase efficiencies for their customers are directly in line with WalkMe's approach to maximizing the user experience."

The strategic partnership allows clients to utilize a customized WalkMe platform, which meets their individual workflow needs and is developed based on how they choose to utilize Docupace. The team will be providing instruction where needed, with the goal being to streamline the user onboarding and learning process in order to minimize the need for time-consuming training and support.

"Getting the most out of technology is critical to advisor success, so that they can focus on their clients and servicing them to the best of their ability," said Mark Tapling, CEO of Docupace. "A major hurdle for broker-dealers and large RIAs is advisor technology support and utilization. We are excited to partner with WalkMe and provide our clients with a customized guide on how to best support their workflow and increase adoption across their organization, while allowing them to maximize the benefits and capabilities of the Docupace platform."

WalkMe is now available to both current and new users of the Docupace Platform for an additional cost. Interested users can contact their representative to learn more and activate WalkMe.

About Docupace

Founded in 2002 with headquarters in Los Angeles, Docupace is a data-driven digital operations platform designed specifically for the wealth management community, including broker-dealers, RIAs, and insurance organizations. As a digital front-to-back office platform, Docupace offers a suite of tools delivered in a modular fashion that enables customers to choose the capabilities that deliver the most value to a customer's operation. Docupace SEC and FINRA compliant workflow solutions in combination with its document management, client onboarding, advisor transitions, and cybersecurity solutions enable a broad set of capabilities to enhance profits for their customers. For additional information, visit www.docupace.com.

About WalkMe

WalkMe pioneered the [Digital Adoption Platform](#) (DAP) to transform the user experience in today's overwhelming digital world. Using artificial intelligence, engagement, guidance and automation, WalkMe's transparent overlay assists users to complete tasks easily within any enterprise software, mobile application or website. Founded in 2011, WalkMe software is used by 2,000 enterprises globally, including 30 percent of Fortune 500 companies. For more information, visit <https://www.walkme.com/>.

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