Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2020

July 2020: Complimentary Abstract / Table of Contents

Everest Group PEAK MATRIX®

Our research offerings for global services

▶ **Market Vista™**
Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

▶ Application Services

▶ BPS | Banking & Financial Services

▶ BPS | Healthcare & Life Sciences

▶ BPS | Insurance

▶ Catalyst™

▶ Cloud & Infrastructure

▶ Customer Experience Management Services

▶ Data & Analytics

▶ Digital Services

▶ Engineering Services

▶ Enterprise Platform Services

▶ Finance & Accounting

▶ Human Resources

▶ ITS | Banking & Financial Services

▶ ITS | Healthcare

▶ ITS | Insurance

▶ IT Services Executive Insights™

▶ ITS | Life Sciences

▶ Locations Insider™

▶ PricePoint™

▶ Procurement

▶ Recruitment & Talent Acquisition

▶ Service Optimization Technologies

More about membership

In addition to a suite of published research,
a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Membership information

- This report is included in the following research program(s)
  – Human Resources Outsourcing (HRO), Service Optimization Technologies (SOT)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at **info@everestgrp.com**

Contents

Anil Vijayan, Vice President

Sharath Hari N, Senior Analyst

Rachita Mehrishi, Analyst

# Contents

Background and scope of the research

Enterprises in today's digital world seek opportunities of digital transformation either within their existing operational cycle or develop new workflows in order to provide better customer as well as employee experience. Moreover, to sustain in this extremely competitive world, it has become imperative that enterprises undergo digital transformation. Additionally, product companies, especially SaaS products and Independent Software Vendors (ISVs), are constantly looking to provide better experiences for their product users. To realize the maximum benefit from these investments, it is imperative that the applications are adopted the right way by employees and customers. DAPs are designed to ease digital transformation for employees and customers – they drive and simplify end user support throughout the digital adoption lifecycle. Enterprises can use DAPs to enhance the training and adoption of the applications, which becomes more relevant in times such as COVID-19 lockdowns, where there is need to provide remote learning experiences. Adoption of DAP solutions can not only help enterprises achieve cost savings, such as reduced training and support costs, but also enhance user experience through better onboarding and guidance.

Vendors are investing in developing solutions that can analyze various contextual factors and understand the user behavior to provide the right guidance at the right time. Armed with the data that DAPs collect on user behavior and click streams, it is possible to make significant improvements to products with user experience and adoption in mind. While DAPs can play a key role in the success of an enterprise's journey, they are relatively new to many potential buyers in terms of product capabilities, features, and commercial models. The technologies are also evolving, with an expanding feature set and increasing richness of functionality.

In this research, we focus on:

- Everest Group's DAP Products PEAK Matrix® evaluation, a comprehensive assessment of 14 DAP technology vendors
  - 2020 DAP PEAK Matrix®
  - Technology vendor capability assessment
- Remarks on key strengths and areas of improvement for each DAP technology vendor
- Technology vendor landscape

Scope of this report:
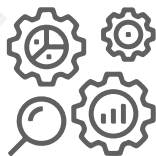
Assessment
Assessing DAP software available in the market for independent licensing. Operational information as of December 2019 and product information as of Q1 2020

Coverage
Coverage across all industries, geographies, end user focus areas (employee vs. customer), and platforms (browser, native mobile, desktops)

Technology vendors
Coverage across 14 DAP technology vendors including AppLearn, AppNavi, Apty, HelpHero, Helppier, JumpSeat, MyGuide by EdCast, Newired, Pointzi, Userlane, WalkMe, Whatfix, YesElf, and Ziplyne

Everest Group's DAP research is based on multiple sources of proprietary information

Proprietary database of 14 DAP technology vendors
The database tracks the following elements for each vendor:
- Breadth and depth of the product functionalities
- Analytics, reporting, and dashboards
- Investments and innovations
- Partnerships with service providers and other technology vendors
- Support in terms of product training, maintenance, consulting, and other support services
- Availability and adoption of commercial model(s)
- Portfolio coverage in terms of industry, geography, process areas, and buyer size
- Vendor performance in terms of revenue and clients

Demonstrations and interactions with technology vendors and other industry stakeholders
- Detailed demos and interviews with DAP technology vendors for a comprehensive view of the products
- Interviews with technology vendors' reference clients
- Executive-level discussions with technology vendors as well as service providers that cover:
  – Current state of the market
  – Opportunities and challenges
  – Expected direction of movement in the industry
  – Technology vendor / service provider vision and roadmap
- Executive-level discussions with industry enablers / specialist system integrators to get the buyer perspective, and to reaffirm the findings from other sources
- On-site as well as conference meetings with enterprise DAP buyers to understand:
  – Vision and objectives
  – Buying criteria
  – Apprehensions and challenges
  – Outcomes achieved
  – Future direction

Proprietary database of RPA and AI capabilities of 50+ leading technology vendors and 50+ BPS providers complements the research
The database tracks the following capability elements for each service provider:
- Clients with automation deployments, scale and scope of deployments, cost savings, and case studies
- Automation client portfolio across buyer sizes, geographies, industries, and BPS segments
- Vision and strategy, top automation solutions, their value propositions, and RPA and AI features
- Technology partnerships and collaborations with academic institutes

Vendors assessed in the PEAK Matrix analysis

AppLearn®

AppNavi

apty

HelpHero

Helppier

jumpseat

myGuide

NEWRED

pointzi

userlane

walkme

whatfix

YesElf

Ziplyne

Everest Group® RESEARCH

Overview and abbreviated summary of key messages

DAPs are designed to ease digital transformation for employees and customers – they drive and simplify end user support throughout the digital adoption lifecycle. This report uses Everest Group's proprietary PEAK Matrix™ framework to evaluate independent software vendors' DAP capabilities across two key dimensions – market impact, and vision & capability. It also includes competitive landscape and market share analysis; an assessment of the vendors' key strengths, areas of improvement, and DAP capabilities.

Some of the findings in this report, among others, are:
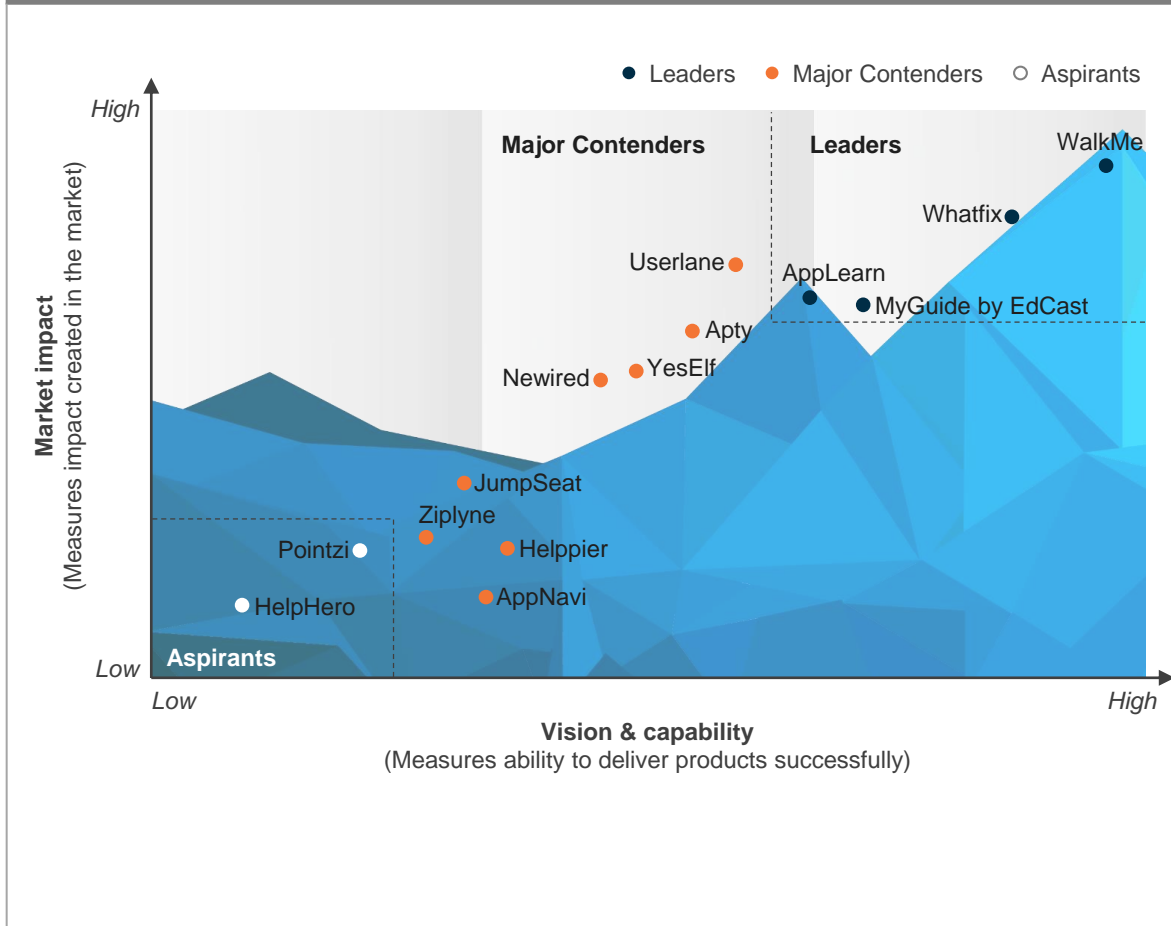
**Everest Group
DAP PEAK Matrix® 2020**

- Everest Group classifies 14 DAP technology vendors on the Everest Group Products PEAK Matrix ® into the three categories of Leaders, Major Contenders, and Aspirants:
  - **Leaders:** AppLearn, MyGuide by EdCast, Whatfix, and WalkMe
  - **Major Contenders:** AppNavi, Apty, Helppier, JumpSeat, Newired, Userlane, YesElf, and Ziplyne
  - **Aspirants:** HelpHero, and Pointzi

Insights on competitive landscape

- WalkMe leads the pack in terms of DAP license revenue in 2019, followed by Whatfix, MyGuide by EdCast, Userlane, and AppLearn; Apty, Ziplyne, and Userlane are the vendors that witnessed the highest YOY revenue growth
- WalkMe has the largest client base in the DAP market, followed by Whatfix; AppNavi, Ziplyne, and Newired have had the highest YOY growth in their clientele
- WalkMe has the highest market share in the top six industry verticals; Whatfix, Userlane, MyGuide by EdCast, and AppLearn are the other DAPs with reasonable presence in these industries
- WalkMe has the highest market share in all geographies. While Whatfix has the second highest market share in North America and Asia Pacific, Userlane has the second highest share in Continental Europe

This study offers three distinct chapters providing a deep dive into key aspects of DAP market; below are three charts to illustrate the depth of the report

Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment 2020

Illustrative example

● Leaders ● Major Contenders ○ Aspirants

High

Market impact
(Measures impact created in the market)

Major Contenders   **Leaders**

WalkMe

Whatfix

Userlane

AppLearn
MyGuide by EdCast

Apty

Newired YesElf

JumpSeat

Ziplyne

Pointzi Helppier

HelpHero AppNavi

Aspirants

Low

Low   High

Vision & capability
(Measures ability to deliver products successfully)

Capability assessment

Illustrative example

Measure of capability: ● High ◐ Low

Technology Vendor	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Commercial model	Overall
Technology Vendor 1										
Technology Vendor 2										
Technology Vendor 3										
Technology Vendor 4										
Technology Vendor 5										
Technology Vendor 6										
Technology Vendor 7										
Technology Vendor 8										

Everest Group's remarks on Technology Vendors

Illustrative example

Measure of capability: ● High ◐ Low

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Commercial model	Overall

Strengths

- Technology vendor1 added XXX new enterprise clients in 2019 resulting in about XX% year-on-year growth in its number of clients. Our estimates indicate that it has the highest share of the DAP software market as well as the largest portfolio of enterprise clients. It also has a balanced client portfolio with significant presence across key geographies, industries, process areas, and buyer sizes
- It offers connectors to integrate with leading enterprise information systems (XXX). Clients rate it highly for its scalability. It has also partnered with system integrators such as XXX for developing libraries of pre-built walkthroughs

Areas of improvement

- While Technology Vendor 1 has very strong guidance capabilities, and lends itself very well for small enterprises, there is scope to further enhance its analytics capabilities with advanced features
- Technology Vendor 1 is yet to demonstrate considerable market success in Continental Europe. It can focus on building application-specific templates for these clients to make it more attractive for industries such as CPG and BFSI, and functions such as SCM
- Clients also expect the vendor to improve its XXX capabilities (XXX). Its recent addition of NLP capabilities to its XXX is a step in this direction

Research calendar
Human Resources Outsourcing (HRO)

Flagship HRO reports	Release date
Multi-Process Human Resources Outsourcing (MPHRO) Annual Report 2020 – Preparing for a Digitally Enhanced Decade	January 2020
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2020	January 2020
Rewards and Recognition (R&R) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2020	April 2020
Learning BPO Services PEAK Matrix® Assessment with Service Provider Landscape 2020	June 2020
Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2020	**July 2020**
Digital Adoption Platform (DAP) – State of the Market Report 2020	Q3 2020
Digital Adoption Platform (DAP) – Technology Vendor Profile Compendium	Q3 2020
Learning BPO Service Provider Profile Compendium 2020	Q3 2020
Multi-Country Payroll (MCP) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2020	Q3 2020
Multi-Country Payroll (MCP) Solutions Annual Report 2020	Q3 2020
Multi-Country Payroll (MCP) Solutions Service Provider Profile Compendium 2020	Q3 2020
Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment with Services Provider Landscape 2020	Q4 2020

Thematic HRO reports	Release date
Start-ups Redefining Employee Experience – Trailblazers (part 3 of 3)	November 2019
Learning Function of the Future	December 2019
Digital Adoption Platform (DAP): Accelerating the Journey from Transformation to Adoption	February 2020
Impact of Recession on the Business Process Services (BPS) Industry	March 2020

Note: For a list of all of our published HRO reports, please refer to our website page

Research calendar
Service Optimization Technologies (SOT)

Flagship SOT reports	Release date
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	March 2020
Intelligent Virtual Agents (IVA) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	March 2020
Process Mining – Technology Vendor Profile Compendium 2020	April 2020
Intelligent Document Processing (IDP) – Technology Vendor Profile Compendium 2020	May 2020
Intelligent Document Processing (IDP) – State of the Market Report 2020	June 2020
Process Mining – State of the Market Report 2020	June 2020
Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2020	**July 2020**
Digital Adoption Platform (DAP) – State of the Market Report 2020	Q3 2020
Digital Adoption Platform (DAP) – Technology Vendor Profile Compendium	Q3 2020

Thematic SOT reports	Release date
Intelligent Automation: Accelerating from Short-term Wins to Long-term Strategic Business Outcomes	March 2019
Advanced Content Intelligence – Pivotal Technology to Empower the New-Age Organization	May 2019
Who Takes on the RPA Mantle?	June 2019
Intelligent Document Processing (IDP) Playbook	September 2019
360-degree Enterprise Automation Playbook	May 2020
Intelligent Automation Orchestration	Q3 2020

Note: For a list of all of our published SOT reports, please refer to our website page

Everest Group®

With you on the journey

Everest Group is a consulting and research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global enterprises, service providers, and investors. Through our research-informed insights and deep experience, we guide clients in their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at **everestgrp.com**.

Stay connected

Website
everestgrp.com

Social Media

🐦 @EverestGroup

in @Everest Group

f @Everest Group

▶ @Everest Group

Blog
everestgrp.com/blog

Podcast
DigitalReal**IT**y

Dallas (Headquarters)	**London**
info@everestgrp.com	unitedkingdom@everestgrp.com
+1-214-451-3000	+44-207-129-1318
Bangalore	**New York**
india@everestgrp.com	info@everestgrp.com
+91-80-61463500	+1-646-805-4000
Delhi	**Toronto**
india@everestgrp.com	canada@everestgrp.com
+91-124-496-1000	+1-416-388-6765