

Digital Adoption Platform (DAP) – State of the Market Report 2021

October 2020: Complimentary Abstract / Table of Contents



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 - [Human Resources Outsourcing \(HRO\)](#), [Service Optimization Technologies \(SOT\)](#)
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For more information on this and other research published by Everest Group, please contact us:

Anil Vijayan, Vice President

Sharath Hari N, Practice Director

Rachita Mehrishi, Analyst

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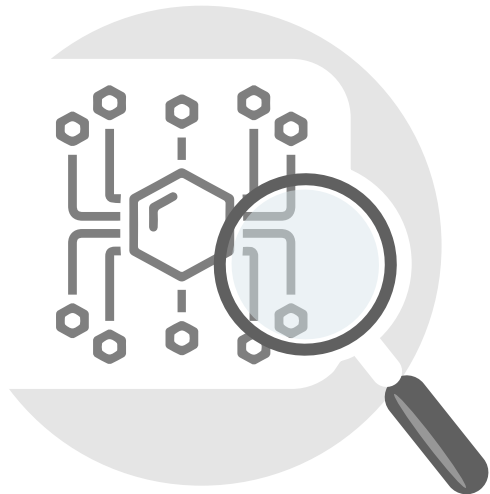
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Background of the research

Enterprises in today's digital world seek opportunities of digital transformation, either within their existing operational cycle or by developing 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 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.

In this study, we investigate the state of the DAP technology vendor market. We focus on:



Evolution of the DAP market



DAP market size and trends



Challenges addressed by DAP during COVID-19



DAP solution characteristics



Buyer feedback and best practices



DAP vendor landscape

Scope of this report

- DAPs in the market that are available for independent licensing were considered for this report
- Data of DAPs from 14 leading software vendors across the globe has been leveraged for this study

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

DAP technology vendors covered



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 examines the global Digital Adoption Platform market in detail. It focuses on the changing market dynamics and emerging buyer adoption trends. The study provides detailed information from the buyers' on their DAP selection criteria, the vendor performance, and their strengths and development areas. The report also looks at the vendor landscape and the market shares and growths.

Some of the findings in this report, among others, are:

Market overview and adoption trends

- The DAP market grew at an impressive rate during 2018-19 driven by increasing global adoption across different industries and buyer sizes. The market, however, may experience a tempered growth in 2020 due to the impact of COVID-19
- North America is the most mature geography by DAP adoption, followed by Europe-UK and Asia Pacific
- The hi-tech & telecom and financial services industries have witnessed the highest adoption of DAPs; there is reasonable adoption from manufacturing and retail industries
- Helping enterprises maintain employee productivity, providing critical communication, and helping new users onboard different software remotely are some of the ways DAP helped enterprises during COVID-19

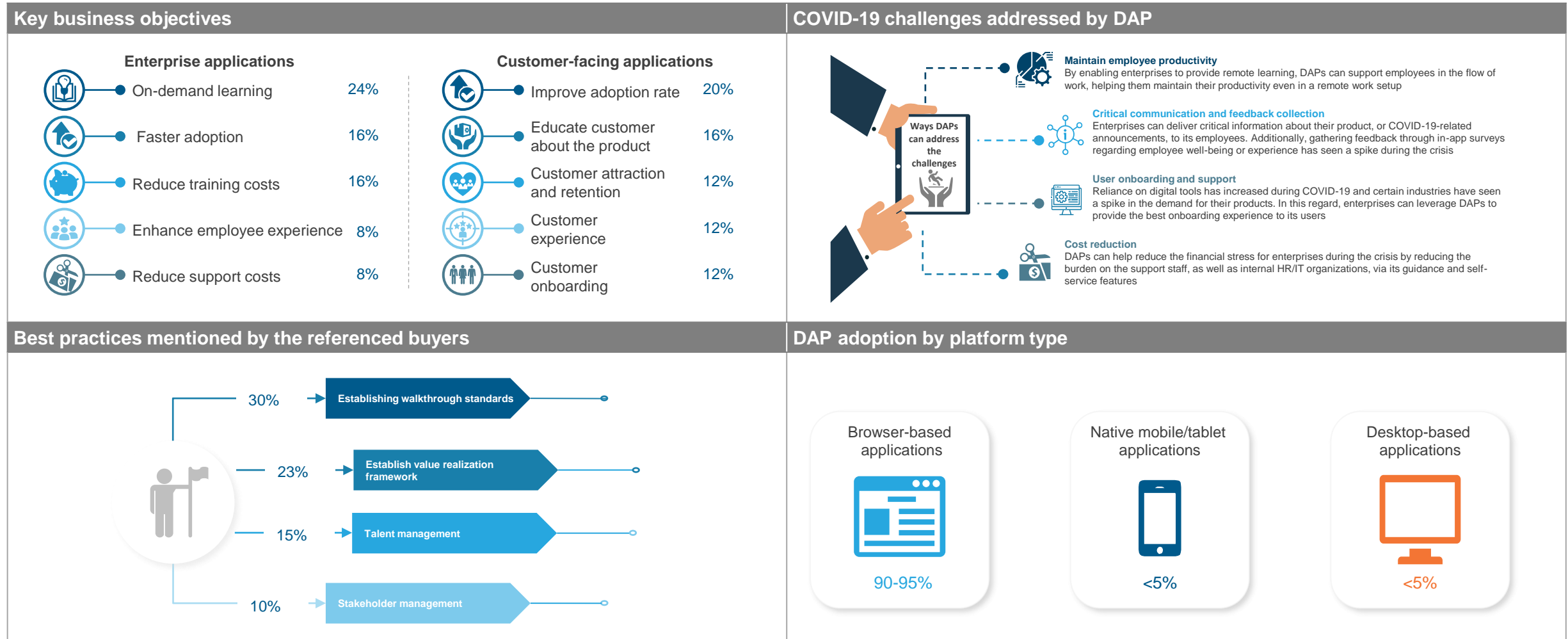
Buyer feedback

- While buyers are satisfied with DAP vendors on their overall performance, there is still some variance in analytics and innovation
- Lack of understanding of DAP, identifying the right stakeholders, improper tracking of metrics, maintaining content and content standards, and expectation mismatch are some of the challenges mentioned by the referenced buyers
- Establishing walkthrough standards, value realization framework, and talent and stakeholder management are the most mentioned best practices by the referenced buyers

Service provider landscape

- 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 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 multiple chapters providing a deep dive into key aspects of the DAP market; below are four charts to illustrate the depth of the report



Research calendar

Human Resources Outsourcing

Published
 Planned
 Current release

Flagship HRO reports

	Release date
Multi-process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2020	January 2020
Rewards and Recognition (Learning Services) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2020	April 2020
Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Service Provider Landscape 2020	July 2020
Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2020	June 2020
Learning Services Provider Profile Compendium 2020	August 2020
Digital Adoption Platform (DAP) Products Provider Profile Compendium 2020	August 2020
Multi-country Payroll (MCP) Solutions PEAK Matrix® Assessment 2020	September 2020
Digital Adoption Platform (DAP) – State of the Market Report 2021	October 2020
Multi-country Payroll (MCP) Solutions Annual Report 2021	Q4 2020
Multi-country Payroll (MCP) Solutions Service Provider Profile Compendium 2021	Q4 2020
Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment with Services Provider Landscape 2021	Q4 2020
Multi-process Human Resources Outsourcing (MPHRO) Annual Report 2021	Q4 2020

Thematic HRO reports

	Release date
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
Price Trends in HRO	September 2020

Note: For a list of all of our published HRO reports, please refer to our [website page](#)

Research calendar

Service Optimization Technologies (SOT)

Published Planned Current release

Flagship SOT reports

Release date

Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2020	July 2020
Intelligent Automation in Business Processes (IABP) – Annual Report – 2020	July 2020
Buyer Satisfaction with Intelligent Document Processing (IDP) – Are Buyer Delighted or Disenchanted?	July 2020
Digital Adoption Platform (DAP) – Technology Vendor Profile Compendium 2020	August 2020
Buyer Satisfaction with Intelligent Virtual Agents (IVA) – Unleashing insights by viewing the market through buyer’s lens	September 2020
Robotic Process Automation (RPA) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	September 2020
Digital Adoption Platform (DAP) – State of the Market Report 2021	October 2020
Robotic Process Automation (RPA) – Technology Vendor Profile Compendium 2021	Q4 2020
Enterprise AI Automation Adoption – Pinnacle Model™ Assessment	Q4 2020
AI Trailblazers 2020 - AI Startups Redefining the Business Process Services	Q4 2020
Robotic Process Automation (RPA) – State of the Market 2021	Q4 2020

Thematic SOT reports

Release date

360-degree Enterprise Automation Playbook	May 2020
Achieving Broader Automation in Finance & Accounting through Intelligent Document Processing (IDP)	July 2020
Building a Lean, Resilient, and Agile Organization Through a Continuous Process Optimization (CPO) Solution	September 2020
Enterprise Process Orchestration	September 2020
Accelerate Automation in Banking with Intelligent Document Processing (IDP)	Q4 2020

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DigitalReallTy



Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

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