

# Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2021

August 2021: Complimentary Abstract / Table of Contents



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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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

### Proprietary database of ~20 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
  - Outcomes achieved
  - Buying criteria
  - Future direction
  - Apprehensions and challenges

### Proprietary database of RPA and AI capabilities of ~100 leading technology vendors and 50+ BPS providers complements the research

The database tracks the following capability elements for each technology/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<sup>1</sup>



<sup>1</sup> Assessments for HelpHero and Helppier exclude vendor inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, technology vendor public disclosures, and Everest Group's interactions with DAP buyers  
**The source of all content is Everest Group unless otherwise specified.**

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion.

## Background and scope of the research

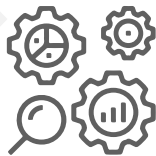
In 2020, many companies hopped on to the bandwagon of digital transformation to tackle the pandemic and sustain their operations as COVID-19 set limitations on workforce collaboration in office and business operations in offline mode. This further reinforced the roles DAPs have the potential to play. Enterprises realized the need to put additional emphasis on customer and user experience as the concerned stakeholders adapted to the digital way of operating. Additionally, organizations looked for solutions that can help them realize the maximum benefit from these investments through a holistic approach to reduce the time taken for users to adopt the applications.

DAPs provide users guidance in the flow of work that helps enterprises achieve their business goals such as boosting employee efficiency, reducing support tickets and costs, improving customer satisfaction scores, increasing trial conversion, as well as minimizing customer churn, among others. Vendors are continuously investing in enhancing their DAP capabilities and global outreach to better serve the clients. The technologies used in DAPs are evolving with several additions in offerings such as user behavior analytics without deploying walkthroughs, integrated chatbots, content management and aggregation systems, and enhanced content editing options, to cite a few examples.

In this research, we focus on:

- Everest Group's DAP Products PEAK Matrix® evaluation, a comprehensive assessment of 18 DAP technology vendors
  - 2021 DAP PEAK Matrix®
  - Technology vendor capability assessment
- Remarks on key strengths and limitations for each DAP technology vendor
- Technology vendor landscape

### Scope of this report:



#### Assessment

Assessing DAP software available in the market for independent licensing. Operational and product information as of Q1 2021



#### Coverage

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



#### Technology vendors

Coverage across 18 DAP technology vendors including Aidaxis, AppLearn, AppNavi, Apty, HelpHero, Helpier, HintEd, Knowmore, MyGuide by EdCast, Newired, OnScreen, Pointzi, tts GmbH, Userlane, WalkMe, Whatfix, YesElf, and Ziplyne

## Overview and abbreviated summary of key messages

This report examines the Digital Adoption Platform (DAP) technology vendor landscape. It provides a deep-dive analysis of where the providers stand in terms of their market impact and vision & capability. Based on the comprehensive Everest Group PEAK Matrix®, 18 DAP vendors are segmented into Leaders, Major Contenders, and Aspirants. Additionally, the report addresses enterprises' sourcing consideration and discusses key strengths and limitations of the vendors.

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

### Everest Group DAP PEAK Matrix® 2021

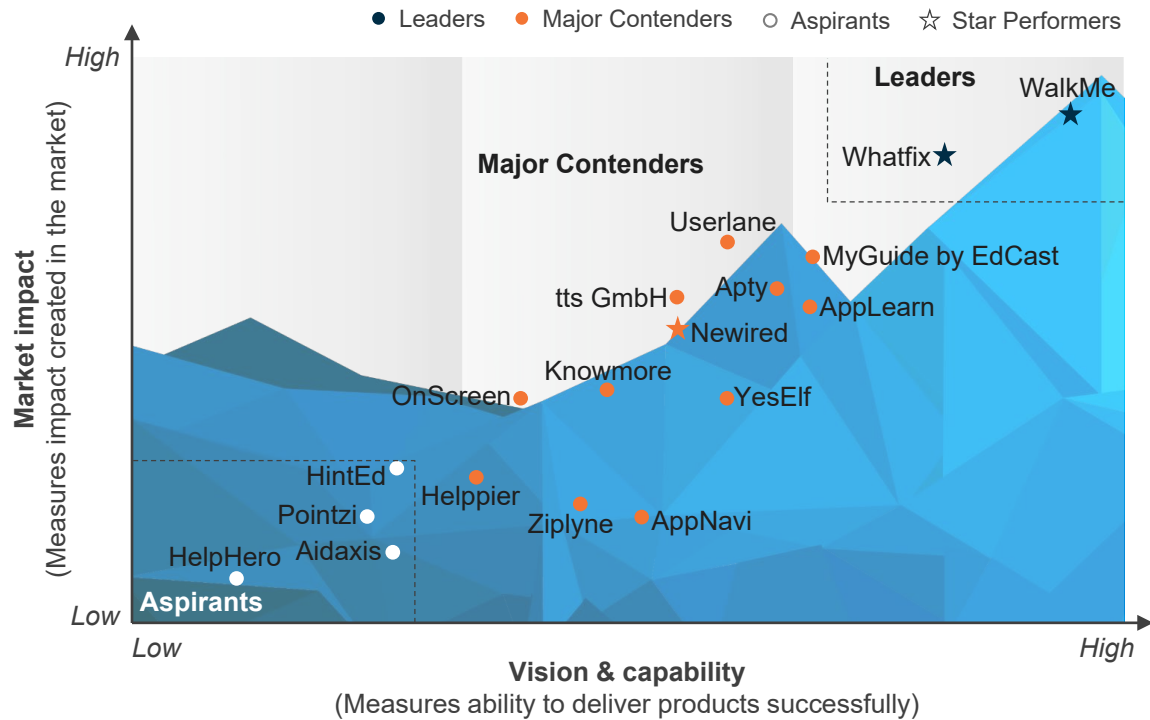
- Everest Group classifies 18 DAP technology vendors on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on the 2021 DAP Products PEAK Matrix®, the segmentation of technology vendors is as follows (in alphabetical order within each category):
  - **Leaders:** WalkMe and Whatfix
  - **Major Contenders:** AppLearn, AppNavi, Apty, Helppier, Knowmore, MyGuide by EdCast, Newired, OnScreen, tts GmbH, Userlane, YesElf, and Ziplyne
  - **Aspirants:** Aidaxis, HelpHero, HintEd, and Pointzi

### Insights on competitive landscape

- WalkMe had the highest DAP market share in 2020; Whatfix, tts GmbH, MyGuide by EdCast, Userlane, AppLearn, and Apty have reasonable market shares
- WalkMe continues to serve the majority of the DAP clients in the market, followed by Whatfix, tts GmbH, Userlane, MyGuide by EdCast, Apty, and AppLearn
- WalkMe continues to have the highest market share in the top five industry verticals; Whatfix, MyGuide by EdCast, Userlane, tts GmbH, and AppLearn are the other DAPs with reasonable presence in these industries
- WalkMe, Whatfix, and Userlane have a wider geographic reach; other DAP vendors such as AppLearn, Apty, MyGuide by EdCast, and tts GmbH are also prominent in certain geographies

# 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 2021<sup>1</sup>



Capability assessment

Illustrative example

Measure of capability: ☐ Low ● High

Technology Vendor	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & 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: ☐ Low ● High

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

<sup>1</sup> Assessments for HelpHero and HelpPier exclude vendor inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, technology vendor public disclosures, and Everest Group's interactions with DAP buyers.  
 Note: Star Performers are selected based on a relative comparison of vendors' performance on the market impact and vision & capability dimensions in the previous and latest PEAK Matrix® assessments. Vendors with the highest year-over-year improvement are designated as Star Performers. The Star Performer title does not reflect the overall market leadership position, which is designated through Leaders, Major Contenders, or Aspirants.

Source: Everest Group (2021).



# Research calendar

## Human Resources Outsourcing (HRO)

Published
  Planned
  Current release

### Flagship HRO reports

	Release date
Multi-process Human Resources Outsourcing (MPHRO) Services – Service Provider Compendium 2021	February 2021
Multi-process Human Resources Outsourcing (MPHRO) – State of the Market Report 2021	February 2021
Rewards and Recognition (R&R) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2021	March 2021
Rewards and Recognition (R&R) Solutions State of the Market Report 2021: The Era for Modernizing Employee Engagement	June 2021
Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2021	June 2021
<b>Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2021</b>	<b>August 2021</b>
Learning Services Provider Profile Compendium 2021	Q3 2021
Digital Adoption Platform (DAP) Products Provider Profile Compendium 2021	Q3 2021
Multi-country Payroll (MCP) Solutions PEAK Matrix® Assessment 2021	Q3 2021
Digital Adoption Platform (DAP) Products – State of the Market Report 2021	Q4 2021
Multi-country Payroll (MCP) Solutions Annual Report 2021	Q4 2021
Multi-country Payroll (MCP) Solutions Service Provider Profile Compendium 2021	Q4 2021

### Thematic HRO reports

	Release date
Employment Outsourcing Models	March 2021
Employee Experience Management (EXM) Platforms	June 2021
Payroll 4.0: A New Era for Global Payroll	July 2021
Human Resource Outsourcing (HRO) 4.0: Reinventing the HR Function	Q3 2021

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
Intelligent Process Automation (IPA) – Solution Provider Landscape with Solutions PEAK Matrix® Assessment 2021	March 2021
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	April 2021
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	May 2021
Intelligent Document Processing (IDP) – Technology Vendor Compendium 2021	June 2021
Intelligent Document Processing (IDP) State of the Market Report 2021 – Key to unlocking value in documents	June 2021
Intelligent Process Automation (IPA) – State of the Market Report 2021	June 2021
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	August 2021

### Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2021

Conversational AI – State of the Market Report 2021	Q3 2021
Digital Adoption Platform (DAP) Products Provider Profile Compendium 2021	Q3 2021
Digital Adoption Platform (DAP) Products – State of the Market Report 2021	Q4 2021

### Thematic SOT reports

	Release date
AI Start-ups Redefining Business Processes: Top 30 Trailblazers	December 2020
Understanding Cloud-native RPA	January 2021
Mine Your Journey to Digital Excellence	March 2021
Intelligent Document Processing (IDP) Playbook 2021	June 2021
Process Mining Playbook 2021	June 2021

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