

Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2022

September 2022: Complimentary Abstract / Table of Contents



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Background and scope of the research

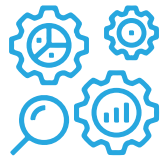
Everest Group defines Digital Adoption Platforms (DAPs) as overlay solutions that are primarily designed to facilitate seamless adoption and learning of the underlying applications. As companies carry on with the uphill task of going digital and embracing the latest technologies to stay on top of their game, DAP is strengthening its position as an enabler for organizations. More enterprises are now looking at solutions such as DAP to navigate new technologies to provide impeccable customer and employee experiences. In addition to the product being leveraged for traditional use cases such as learning and training users in the flow of work, DAP is now catering to complex ones such as handling enterprise-wide change management, offering personalized experiences to new vs. tenured employees, bringing in all the existing enterprise knowledge at one place, and providing seamless support throughout an entire process irrespective of where the user is.

Enterprises seek a DAP to have the intended Rol from their digital transformation and impact their bottom line. Over the last few years, the product has stepped up to fulfill these buyers' needs through technological advancements such as advanced analytics and dashboards for high visibility, integrations with knowledge bases, automation for faster execution of tasks, and other tools to offer a seamless experience to the users. Interestingly, as the DAP market continues to mature, vendors are going for more partnerships, mergers, and acquisitions to expand their capabilities and client outreach.

In this study, we analyze the DAP technology landscape across various dimensions:

- Overview of DAP software products
- Everest Group's DAP Products PEAK Matrix® evaluation, a comparative assessment of 20 DAP technology vendors
- Competitive landscape of the DAP technology provider market
- Remarks on key strengths and limitations for each DAP technology vendor

Scope of this report



Assessment

Assessing the DAP software available in the market for independent licensing. Operational and product information as of Q1 2022



Coverage

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



Technology vendors

Coverage across 20 DAP technology vendors including Aidaxis, AppLearn, AppNavi, Apty, Gyde, HintEd, ImprovedApps, Knowmore, Lemon Learning, MyGuide by EdCast, Newired, OnScreen, Pendo, Spekit, Toonimo, tts GmbH, Userlane, WalkMe, Whatfix, and Ziptyne

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®, 20 DAP vendors are segmented into Leaders, Major Contenders, and Aspirants. Additionally, the report addresses enterprises' sourcing considerations and discusses key strengths and limitations of the vendors.

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

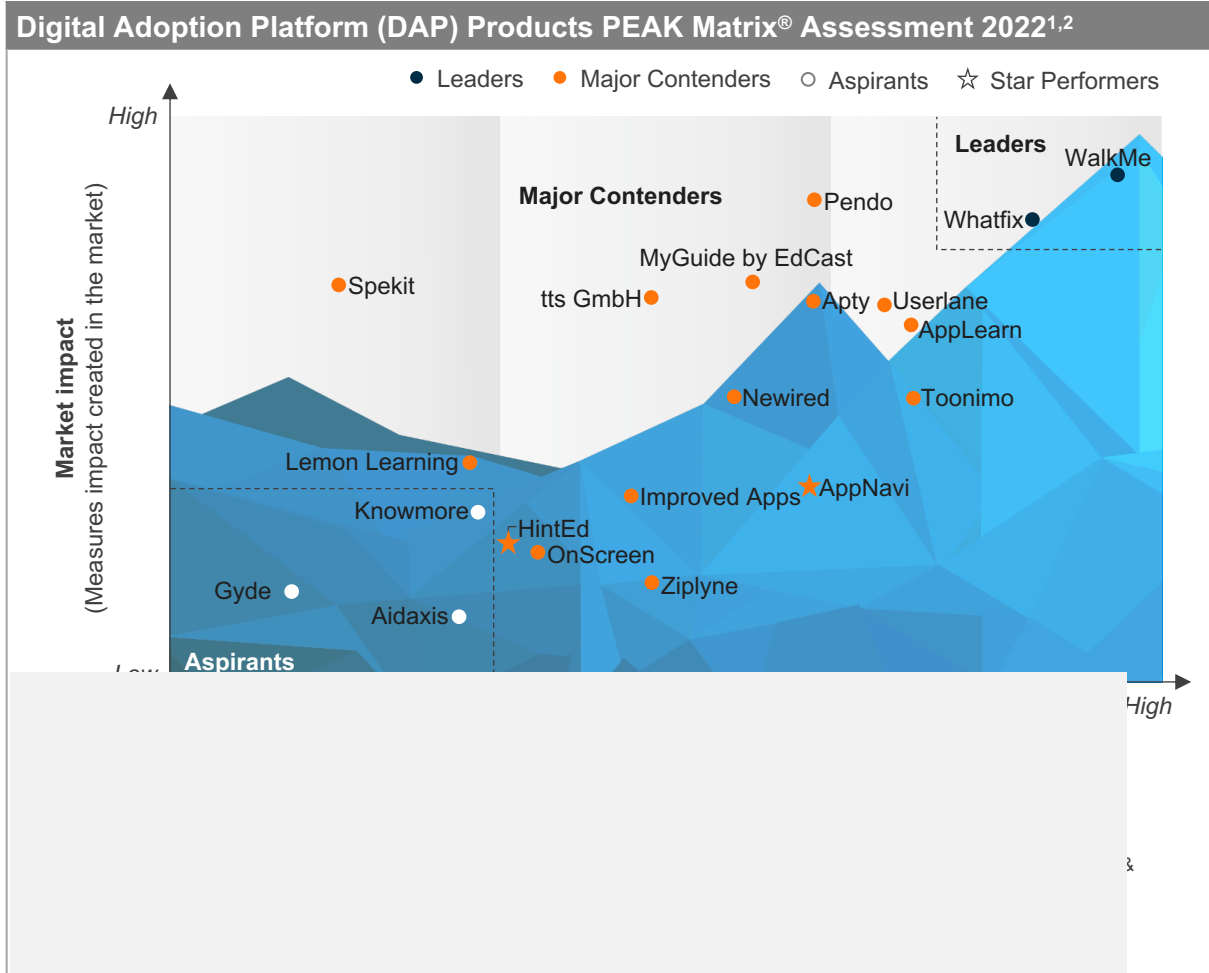
Everest Group DAP PEAK Matrix® 2022

- Everest Group classifies 20 DAP technology vendors on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on the 2022 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, HintEd, Improved Apps, Lemon Learning, MyGuide by EdCast, Newired, OnScreen, Pendo, Spekit, Toonimo, tts GmbH, Userlane, and Ziplyne
 - **Aspirants:** Aidaxis, Gyde, and Knowmore

Insights on competitive landscape

- WalkMe, Pendo, and Whatfix are the top three providers accounting for more than 50% of the annual DAP revenue
- Pendo and WalkMe serve more than half of the DAP clients in the market; Whatfix has a sizable client base
- Pendo, WalkMe, and Whatfix have a significant presence across all the top five industries; AppLearn, MyGuide by EdCast and Userlane have a reasonable presence in some of these industries
- WalkMe and Whatfix have the widest geographic coverage; Apty, Pendo, and Userlane also have a noteworthy presence in some 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



Capability assessment

Illustrative example

Measure of capability: 🟡 Low 🟢 High

Technology Vendors	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and 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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall
🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢

Strengths

- Technology vendor1 added XXX new enterprise clients in 2021 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)

Published Planned Current release

Reports title	Release date
Employee Experience Management (EXM) Platforms PEAK Matrix® Assessment 2022	March 2022
Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2022	March 2022
Navigating Change with Technology for Better Rol	May 2022
Learning Experience Platforms (LXPs)	June 2022
360-degree Digital Adoption	June 2022
The Payroll Transformation Journey	June 2022
Employee Experience Management (EXM) Platforms – Technology Vendor Compendium 2022	June 2022
Multi-process Human Resources Outsourcing (MPHRO) Services – Service Provider Compendium 2022	June 2022
Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2022	September 2022
Digital Adoption Platform (DAP) – State of the Market Report 2022	Q3 2022
Digital Adoption Platform (DAP) – Technology Vendor Profile Compendium	Q3 2022
Learning Experience Platforms (LXP) – Technology Vendor Landscape with PEAK Matrix® Assessment 2022	Q3 2022
Multi-Country Payroll (MCP) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2022	Q3 2022
Employer of Record (EOR) – Solutions Provider Landscape with PEAK Matrix® Assessment 2022	Q3 2022
Employee Experience Management (EXM) State of the Market Report 2022	Q3 2022
Multi-Country Payroll Solutions (MCPS) – Solutions Provider Compendium 2022	Q3 2022

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