

Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2023

September 2023: Complimentary Abstract / Table of Contents



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Background and scope of the research

The way we work is changing with technology advancing at a rapid pace. In order to remain competitive, evolving into a digital-first business is becoming imperative for enterprises across all industries. However, value realization from digital transformation initiatives can be significantly delayed if the users are not adequately trained and equipped to use new technologies effectively. To overcome these challenges and ensure business continuity and success in the digital workplace, Digital Adoption Platforms (DAP) provide in-application guidance to facilitate seamless adoption and learning of new technologies. DAPs have played a key role in helping organizations to not only achieve benefits such as accelerated digital transformation, user onboarding and training, and change management, but have also opened avenues to cater to broader business use cases such as optimized software spending, data integrity, enterprise-wide search, and enhanced customer and employee experience.

The DAP technology landscape is rapidly evolving, with an expanding set of features and functionalities, deployment options, partner ecosystems, and commercial models. DAP providers are investing in advanced analytics to provide visibility into user behavior and application usage, as well as automating repetitive tasks to drive user productivity. Therefore, as the DAP market continues to mature, it is crucial for organizations to select the right enterprise-grade DAP solution to realize the expected benefits.

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

- Overview of DAP software products
- Everest Group's DAP PEAK Matrix® evaluation, a comparative assessment of 23 DAP technology providers
- Competitive landscape of the DAP technology provider market
- Remarks on key strengths and limitations of each DAP technology provider

Scope of this report



Assessment

Assessing the DAP software available in the market for independent licensing; operational and product information as of Q1 2023



Coverage

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



Technology providers

Covers 23 DAP technology providers including Aidaxis, AppLearn, AppNavi, Apty, Gyde, HintEd, Improved Apps, Knowmore, Lemon Learning, MyGuide by Cornerstone, myMeta Software, Newired, Pendo, SAP Enable Now, Shortways, Stonly, Spekit, Toonimo, tts GmbH, Userlane, WalkMe, Whatfix, and Ziplyne

Overview and abbreviated summary of key messages

This report examines the Digital Adoption Platforms (DAP) technology provider 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®, 23 DAP providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, the report addresses enterprises' sourcing considerations and discusses key strengths and limitations of the providers.

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

Everest Group DAP PEAK Matrix® 2023

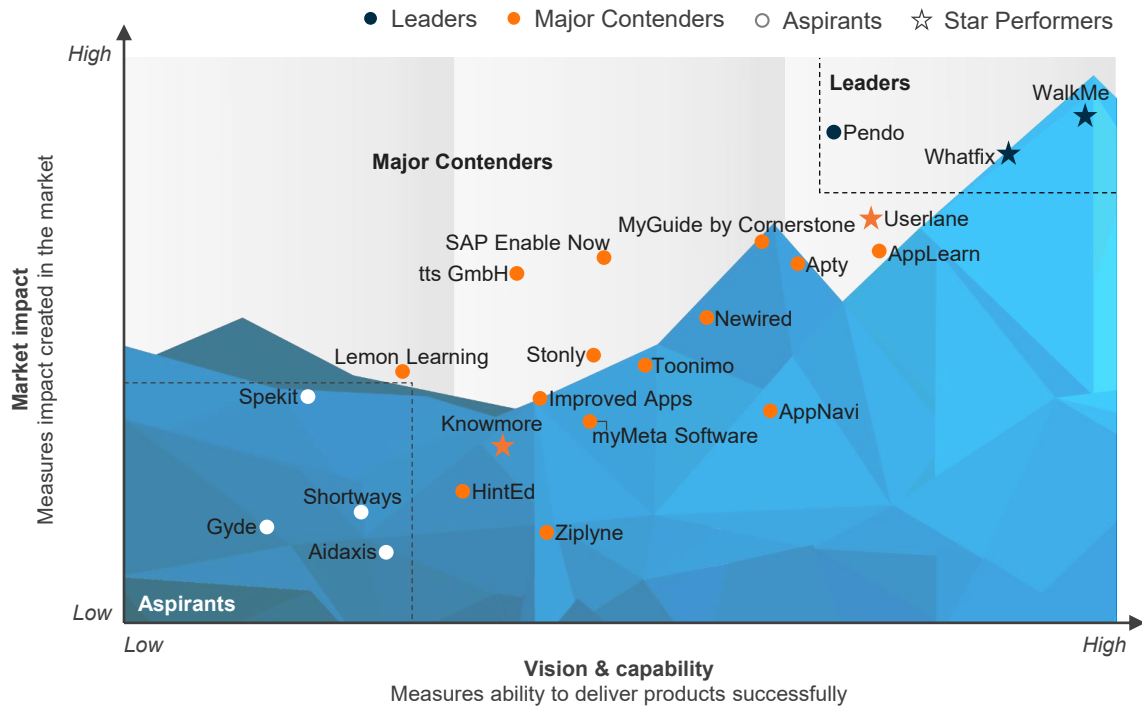
- Everest Group classifies 23 DAP technology providers on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on the 2023 DAP PEAK Matrix®, the segmentation of technology providers is as follows (in alphabetical order within each category):
 - **Leaders:** Pendo, WalkMe, and Whatfix
 - **Major Contenders:** AppLearn, AppNavi, Apty, HintEd, Improved Apps, Knowmore, Lemon Learning, MyGuide by Cornerstone, myMeta Software, Newired, SAP Enable Now, Stonly, Toonimo, tts GmbH, Userlane, and Ziplyne
 - **Aspirants:** Aidaxis, Gyde, Shortways, and Spekit

Insights on competitive landscape

- WalkMe, Pendo, and Whatfix account for more than 60% of the annual DAP revenue
- WalkMe emerged as the top contributor of net new revenue added to the market; Pendo, Whatfix, and Userlane have also made significant contribution
- Pendo, WalkMe, and Whatfix are among the leading players across major industries; Userlane, AppLearn, and MyGuide by Cornerstone are the other providers with a high market share across industries
- WalkMe, Whatfix, and Pendo have a strong presence across major geographies; Apty, AppLearn, and Userlane are other dominant providers 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

Everest Group Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2023



1 Assessment for Gyde, Lemon Learning, and Spekit exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with DAP buyers
 Note: Star Performers are selected based on a relative comparison of providers' performance on the market impact and vision and capability dimensions in the previous and latest PEAK Matrix® assessments. Providers with the highest YoY 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 (2023)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	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
Providers 1	●	●	●	●	●	●	●	●	●	●
Providers 2	○	○	○	○	○	○	○	○	○	○
Providers 3	○	○	○	○	○	○	○	○	○	○
Providers 4	○	○	○	○	○	○	○	○	○	○
Providers 5	○	○	○	○	○	○	○	○	○	○
Providers 6	○	○	○	○	○	○	○	○	○	○
Providers 7	○	○	○	○	○	○	○	○	○	○
Providers 8	○	○	○	○	○	○	○	○	○	○

Everest Group's remarks on Technology Providers

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

- Provider 1 added XYZ 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 (XYZ). Clients rate it highly for its scalability. It has also partnered with system integrators such as XYZ for developing libraries of pre-built walkthroughs

Areas of improvement

- While provider 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
- Provider 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 provider to improve its XYZ capabilities (XYZ). Its recent addition of NLP capabilities to its XYZ is a step in this direction

Research calendar

Human Resources Outsourcing

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Earned Wage Access and Financial Wellness Solutions (EWA & FWS) in the US State of the Market Report 2023	November 2022
Digital Adoption Platform (DAP) – State of the Market 2023	November 2022
Employer of Record (EOR) – State of the Market 2023	December 2022
Learning Experience Platforms (LXP) State of the Market Report 2023	December 2022
Fluid Payroll: Multi-country Payroll (MCP) Solutions State of the Market Report 2023	December 2022
Nine Employee Experience Solutions Enterprises Need – Is Surviving the Recession Enough?	March 2023
People Analytics Platforms	March 2023
Unlocking the Full Potential of Users Through Userization and DAPs	March 2023
Rewards and Recognition (R&R) Solutions PEAK Matrix® Assessment 2023	April 2023
Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2023	August 2023
Employee Experience Management (EXM) Platforms PEAK Matrix® Assessment 2023	August 2023
Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2023	September 2023
Multi-Country Payroll (MCP) Solutions PEAK Matrix® Assessment 2023	Q3 2023
Digital Adoption Platforms (DAP) – Provider Compendium 2023	Q4 2023
Digital Adoption Platforms (DAP) – State of the Market 2023	Q4 2023

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