Digital Adoption Platforms (DAP) – Provider Compendium 2023 – Update

October 2023: Complimentary Abstract / Table of Contents

EGR-2023-24-CA-6170

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Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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For more information on this and other research published by Everest Group, please contact us:

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Contents

This report is based on multiple sources of information

Proprietary database of 23+ DAP technology providers
The database tracks the following elements for each provider:
- Breadth and depth of the product functionalities
- Analytics, reporting, and dashboards
- Investments and innovations
- Partnerships with service providers and other technology providers
- Support in terms of product training, maintenance, consulting, and other support services
- Availability and adoption of the commercial model(s)
- Portfolio coverage in terms of industry, geography, process areas, and buyer size
- Provider performance in terms of revenue and clients

Demonstrations and interactions with technology providers and other industry stakeholders
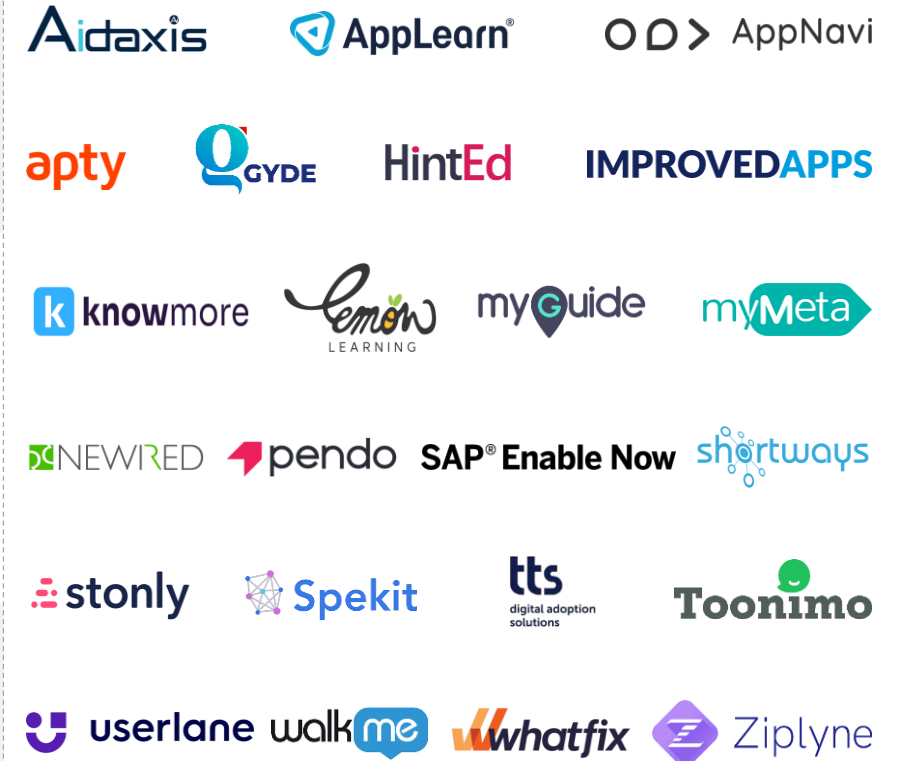- Detailed demos and interviews with DAP technology providers for a comprehensive view of the products
- Interviews with technology providers' reference clients
- Executive-level discussions with technology providers as well as service providers that cover:
  - Current state of the market
  - Opportunities and challenges
  - Expected direction of movement in the industry
  - Technology provider's / service provider's 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 ~100 leading providers 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

Providers assessed[1]

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
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

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Background and scope of the research

The way enterprises 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 serve 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 report, we present detailed profiles of DAP technology providers, covering the following aspects of their DAP offerings and capabilities:

- Company overview
- Recent deals and announcements
- Market adoption and client portfolio mix
- Product overview and partnerships
- Product features and functionalities and key enhancements
- Measure of capabilities across PEAK Matrix® dimensions
- Key strengths and limitations for technology providers

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 detailed profiles of providers analyzed in the Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2023. This report provides comprehensive snapshots of the 23 major DAP technology providers. Each profile highlights the provider's technology capabilities along with presence across geographies, industries, and buyer sizes sub-segments.

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

DAP provider landscape snapshot

- This section provides a snapshot of how the 23 DAP technology providers have been positioned on the PEAK Matrix assessment
- It also helps understand the research methodology and framework adopted to conduct the analysis

DAP provider profiles

- DAP overview – Includes company overview, product overview, key leaders, product enhancements, and list of deals, investments, and announcements. It also includes key clients, DAP revenue, key partners, DAP revenue by industry, geography, buyer size, application area, and application coverage
- DAP technology capabilities and offerings – Includes detailed capabilities and offerings of the DAP providers such as sub-dimensions of in-app guidance and support, administrator-/creator mode, user behavior and product analytics, and implementation, training, and support, among many others
- DAP sourcing considerations – Includes assessment of the performance of the provider as per the PEAK Matrix along with key strengths and limitations

The study provides detailed view of providers' DAP offerings & capabilities as well as key strengths & areas of improvement | snapshots to illustrate the depth of report

Summary dashboard | market impact and vision & capability assessment of providers for DAP 2023

Providers	Market adoption	Portf mi
Provider 1		
Provider 2		
Provider 3		
Provider 4		
Provider 5		
Provider 6		
Provider 7		

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Provider 1 profile
Overview

Company overview
Founded in 2017, Provider 1 is a DAP focused on developing a guidance. It has partnerships with solution partners including V Equipment Manufacturer (OEMs), and SIs to offer the product professional services. The company has also developed a robu implementation, and technology partnerships to increase mark

Headquarters: XYZ

Key leaders
- XYZ
- XYZ
- XYZ

Key deals, investments, and announcements (not exhaustive
- Expanded its partnership ecosystem to included Me Learnin
- Started offering professional and expert certification for digita

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Provider 1 profile
Capabilities

Capability and offerings

In-app guidance and support	Step-by-step guidance (interactive side walkthroughs)
	Self-help/Contextual help widget fe
	In-house surveys (polls, NPS, form collect user feedback
	Automatic contextualization (ability content in a help widget/checklist th specific to a particular page/locatio
Administrator-/Creator-mode	Steps recorder / Elements selection
	Steps rearrangement using drag an and down
Ancillary capabilities	Auto-testing of the created walkthro
	Behavior-based segmentation
Applications supported	Browser-based applications

1 Automatic contextualization refers to the ability to display content in

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Provider 1 profile
Everest Group assessment – Le

Market impact		
Market adoption	Portfolio mix	Value delivered

Strengths
- Technology provider 1 added XYZ new enterprise clien market as well as the largest portfolio of enterprise clien
- It offers connectors to integrate with leading enterprise pre-built walkthroughs

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Provider 1 profile
Everest Group assessment – Leader / Major Contender / Aspirant

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

Limitations
- 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
- 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

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Human Resources

Reports title	Release date
Earned Wage Access and Financial Wellness Solutions (EWA & FWS) in the US State of the Market Report 2023	November 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
Employer of Record (EOR) Solutions PEAK Matrix® Assessment 2023	September 2023
Multi-Country Payroll (MCP) Solutions PEAK Matrix® Assessment 2023	October 2023
Digital Adoption Platforms (DAP) – Provider Compendium 2023 – Update	**October 2023**
Multi-process Human Resources Outsourcing (MPHRO) Services – Provider Compendium 2023	Q4 2023
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