

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

October 2023: Complimentary Abstract / Table of Contents



Our research offerings

This report is included in the following research program(s):

[Human Resources, Digital Adoption Platforms](#)

- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ CXM Technology
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ GBS Talent Excellence
- ▶ Global Business Services
- ▶ Google Cloud
- ▶ Healthcare Business Process
- ▶ Healthcare Information Technology
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Services Executive Insights™
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

[Learn more about our custom research capabilities](#)

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

Contents

1. Introduction and overview	5
• Research methodology	6
• Background and scope of the research	8
• Understanding DAPs	9
2. DAP provider landscape snapshot	12
• Products PEAK Matrix® evaluation dimensions	14
• DAP PEAK Matrix 2023	16
• Technology provider capability summary dashboard	17
3. Technology provider profiles	21
• Leaders	21
– Pendo	22
– WalkMe	29
– Whatfix	36
• Major Contenders	43
– AppLearn	44
– AppNavi	51
– Aptly	58
– HintEd	65
– Improved Apps	72
– Knowmore	79

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

Sharath Hari N, Vice President

Anwesha Chakraborty, Senior Analyst

Era Singh, Senior Analyst

Contents

• Major Contenders (continued)	
– Lemon Learning	86
– MyGuide by Cornerstone	88
– myMeta Software	95
– Newired	102
– SAP Enable Now	109
– Stonly	116
– Toonimo	123
– tts GmbH	130
– Userlane	137
– Ziplyne	144
• Aspirants	151
– Aidaxis	152
– Gyde	159
– Shortways	161
– Spekit	168
4. Appendix	170
• Glossary	171
• Research calendar	173

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

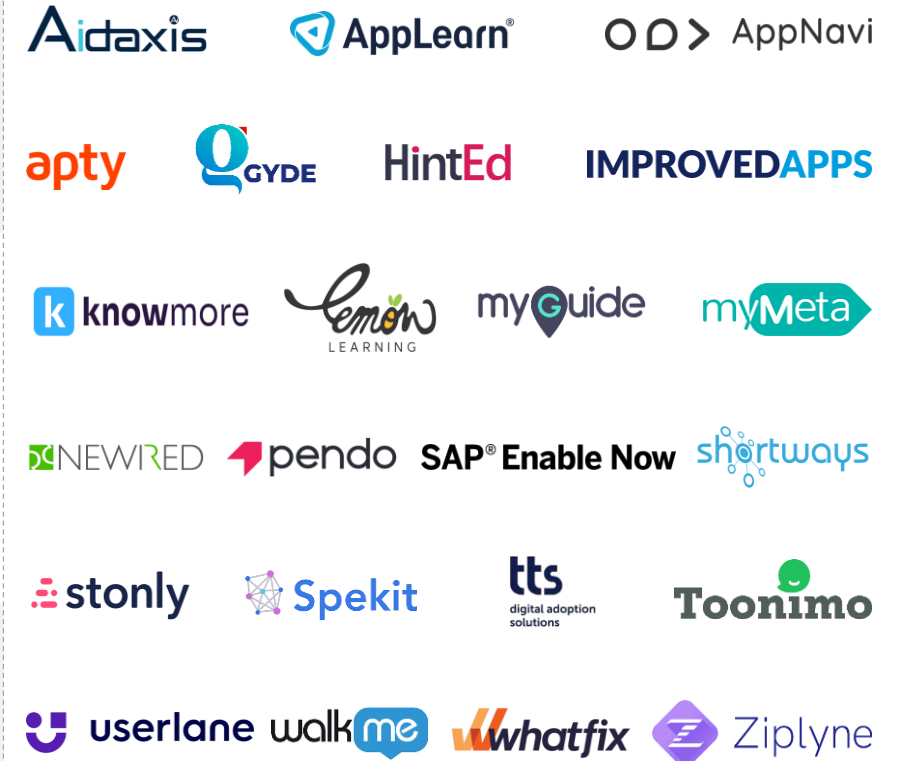
- Detailed demos and interviews with DAP technology providers for a comprehensive view of the products
- Interviews with technology providers' reference clients
- Executive-level discussions with technology providers as well as service providers that cover:
 - Current state of the market
 - Opportunities 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 assessed¹



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

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

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

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

Providers	Market adoption	Portfolio mix
Provider 1		
Provider 2		
Provider 3		
Provider 4		
Provider 5		
Provider 6		
Provider 7		

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

Provider 1 profile Overview

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

Headquarters: XYZ

Key leaders

- XYZ
- XYZ
- XYZ

Key deals, investments, and announcements (not exhaustive)

- Expanded its partnership ecosystem to include Me Learning
- Started offering professional and expert certification for digital adoption

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

Provider 1 profile Capabilities

Capability and offerings

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

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

Provider 1 profile Everest Group assessment – Leader

Market impact

Market adoption	Portfolio mix	Value delivered

Strengths

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

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

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

Market impact

Market adoption	Portfolio mix	Value delivered	Overall

Vision & capability

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

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

1 Automatic contextualization refers to the ability to display content in a help widget/checklist specific to a particular page/location

Everest Group® Proprietary & Confidential. © 2023, Everest Global, Inc. | EGR-2023-24-CA-6170

Research calendar

Human Resources

■ 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
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
Digital Adoption Platforms (DAP) – State of the Market 2023	Q4 2023

Note: [Click](#) to see a list of all of our published Human Resources reports



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

Stay connected

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

Toronto
canada@everestgrp.com
+1-214-451-3000

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.

Website
everestgrp.com

Social Media
 @EverestGroup
 @Everest Group
 @Everest Group
 @Everest Group

Blog
everestgrp.com/blog

NOTICE AND DISCLAIMERS

IMPORTANT INFORMATION. PLEASE REVIEW THIS NOTICE CAREFULLY AND IN ITS ENTIRETY. THROUGH YOUR ACCESS, YOU AGREE TO EVEREST GROUP'S TERMS OF USE.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use/, is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.