



# Digital Adoption Platforms (DAP) PEAK Matrix<sup>®</sup> Assessment 2024

September 2024: Complimentary Abstract / Table of Contents

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- ▶ Life Sciences Commercial Technologies
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- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
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- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG
- ▶ 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™
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# Background and scope of the research

Realizing the full potential of digital transformation has long been a challenge for enterprises. However, as they advance, the next wave of AI-driven transformation has arrived. Digital Adoption Platforms (DAPs) are essential in this evolving landscape, bridging the gap between complex software and user adoption. DAPs not only help users navigate applications and business processes effectively, but also facilitate secure AI adoption by swiftly applying guardrails to drive the right user behavior. Moreover, with the infusion of AI into DAPs, these platforms are poised to evolve and become even more intelligent, simplifying the user experience and driving overall business success.

To support enterprise objectives, DAPs are rapidly expanding their capabilities beyond traditional user adoption. They are now being employed for software rationalization, risk and compliance management, and driving productivity. The market has seen significant M&A activity, with four acquisitions in the past year alone, underscoring the critical role DAPs play in successful transformations. Hence, embracing DAP technology will be key for businesses aiming to stay competitive and maximize the value of their software investments in the digital age.

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

- Overview of DAP software products
- Everest Group's PEAK Matrix® evaluation, a comparative assessment of 25 DAP providers
- Competitive landscape in 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 2024

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

**Technology providers:** covers 25 DAP technology providers including Aidaxis, AppNavi, Apty, Cornerstone Guide, Gyde, HelpHero, HintEd, Improved Apps, Inline Manual, Knowmore, Lemon Learning, myMeta Software, Newired, Nextthink Adopt, Oracle Guided Learning, Pendo, SAP Enable Now, Shortways, Spekit, Toonimo, tts GmbH, Userlane, WalkMe, Whatfix, and Ziplyne

## Overview and abbreviated summary of key messages (page 1 of 2)

This report examines the dynamics of the global, North America, and Europe DAP provider landscape. This report uses Everest Group's proprietary PEAK Matrix® framework to evaluate DAP provider's capabilities across two key dimensions – market impact, and vision & capability. It also includes competitive landscape and market share analysis, as well as an assessment of the providers' key strengths, areas of improvement, and DAP capabilities.

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

#### Everest Group DAP PEAK Matrix® 2024 – Global

- Everest Group classifies 25 DAP technology providers on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on the 2024 DAP PEAK Matrix®, the segmentation of technology providers is as follows (in alphabetical order within each category):
  - **Leaders:** Pendo, WalkMe, and Whatfix
  - **Major Contenders:** AppNavi, Apty, Cornerstone Guide, HintEd, Improved Apps, Inline Manual, Knowmore, Lemon Learning, myMeta Software, Newired, Nextthink Adopt, Oracle Guided Learning, SAP Enable Now, Toonimo, tts GmbH, Userlane, and Zipllyne
  - **Aspirants:** Aidaxis, Gyde, HelpHero, Shortways, and Spekit

#### Everest Group DAP PEAK Matrix® 2024 – North America

- Everest Group classifies 16 DAP technology providers on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on the 2024 DAP PEAK Matrix®, the segmentation of technology providers is as follows (in alphabetical order within each category):
  - **Leaders:** Pendo, WalkMe, and Whatfix
  - **Major Contenders:** Apty, Cornerstone Guide, Newired, Nextthink Adopt, Oracle Guided Learning, SAP Enable Now, Spekit, Toonimo, Userlane, and Zipllyne
  - **Aspirants:** Gyde, HelpHero, and Improved Apps



## Overview and abbreviated summary of key messages (page 2 of 2)

This report examines the dynamics of the global, North America, and Europe DAP provider landscape. This report uses Everest Group's proprietary PEAK Matrix® framework to evaluate DAP provider's capabilities across two key dimensions – market impact, and vision & capability. It also includes competitive landscape and market share analysis, as well as an assessment of the providers' key strengths, areas of improvement, and DAP capabilities.

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

#### Everest Group DAP PEAK Matrix® 2024 – Europe

- Everest Group classifies 21 DAP technology providers on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on the 2024 DAP PEAK Matrix®, the segmentation of technology providers is as follows (in alphabetical order within each category):
  - **Leaders:** Userlane, WalkMe, and Whatfix
  - **Major Contenders:** AppNavi, Cornerstone Guide, Improved Apps, Inline Manual, Knowmore, Lemon Learning, myMeta Software, Newired, Nextthink Adopt, Oracle Guided Learning, Pendo, SAP Enable Now, Shortways, Toonimo, and tts GmbH
  - **Aspirants:** Aidaxis, Gyde, and HintEd

#### Insights on competitive landscape

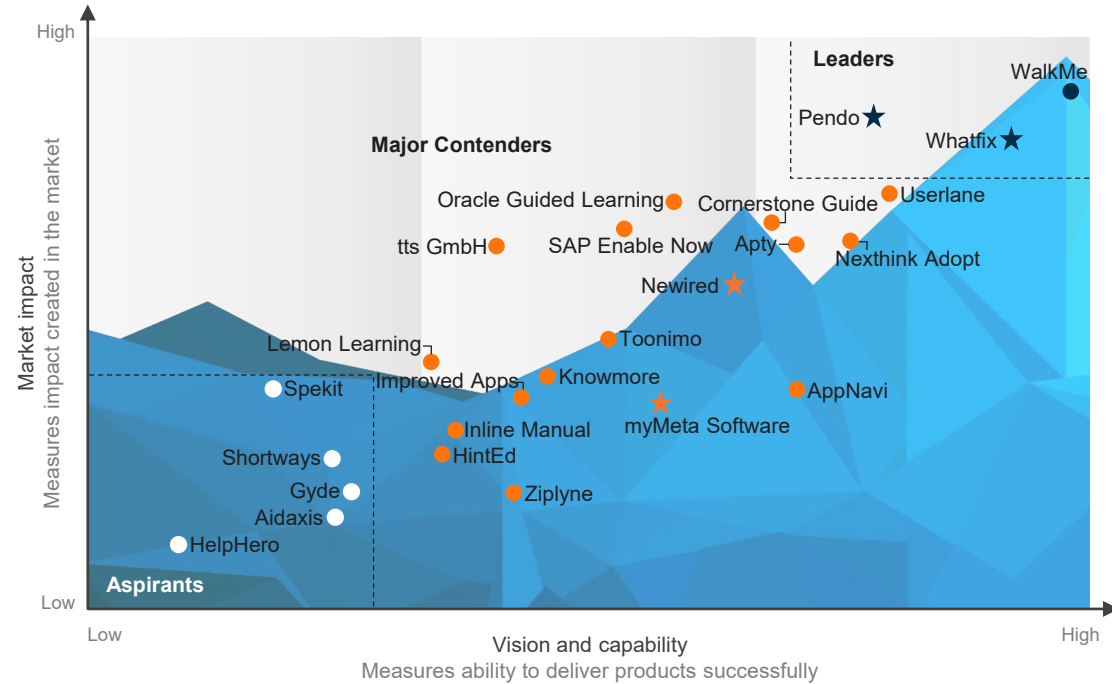
- WalkMe leads the market in terms of DAP revenue share, followed by Pendo and Whatfix, with the three accounting for more than 65% of the market
- WalkMe, Pendo, and Whatfix are the top contributors of net new revenue added to the market; Apty, Cornerstone Guide, Oracle Guided Learning, and Userlane have also made notable contributions
- Pendo, WalkMe, and Whatfix are prominent players in key global markets, while Apty, Nextthink Adopt, Userlane, and Oracle Guided Learning lead in specific regions
- WalkMe has the highest market share in most verticals; Cornerstone Guide, Pendo, Userlane, and Whatfix are also some of the top providers across industry verticals

This study offers distinct chapters providing a deep dive into key aspects of the global market; below are three charts to illustrate the depth of the report

Everest Group PEAK Matrix® Assessment 2024

Everest Group Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2024<sup>1</sup> – Global

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers



<sup>1</sup> Assessment for HelpHero, Nexthink Adopt, Spekit, Toonimo, tts GmbH, and Ziplyne 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  
Source: Everest Group (2024)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall
Provider 1	●	●	●	●	●	●	●	●	●	●
Provider 2	○	○	●	○	●	○	○	●	●	○
Provider 3	●	●	●	●	●	●	●	●	●	●
Provider 4	●	●	●	●	●	●	●	●	●	●
Provider 5	○	○	●	●	○	○	●	●	●	●
Provider 6	●	○	●	●	●	○	●	○	○	○

Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

Market impact				Vision and 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, has a robust presence globally with partnerships across North America and Europe, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Limitations

- Provider 1 has the potential to enhance its partner ecosystem and launch a partner program with the implementation of tiering and improved enablement options
- Forward-thinking organizations exploring DAP providers that offer advanced AI capabilities, including generative AI, may find Provider 1 less suitable due to its limited capabilities in this area. However, the provider is actively working to enhance its offerings

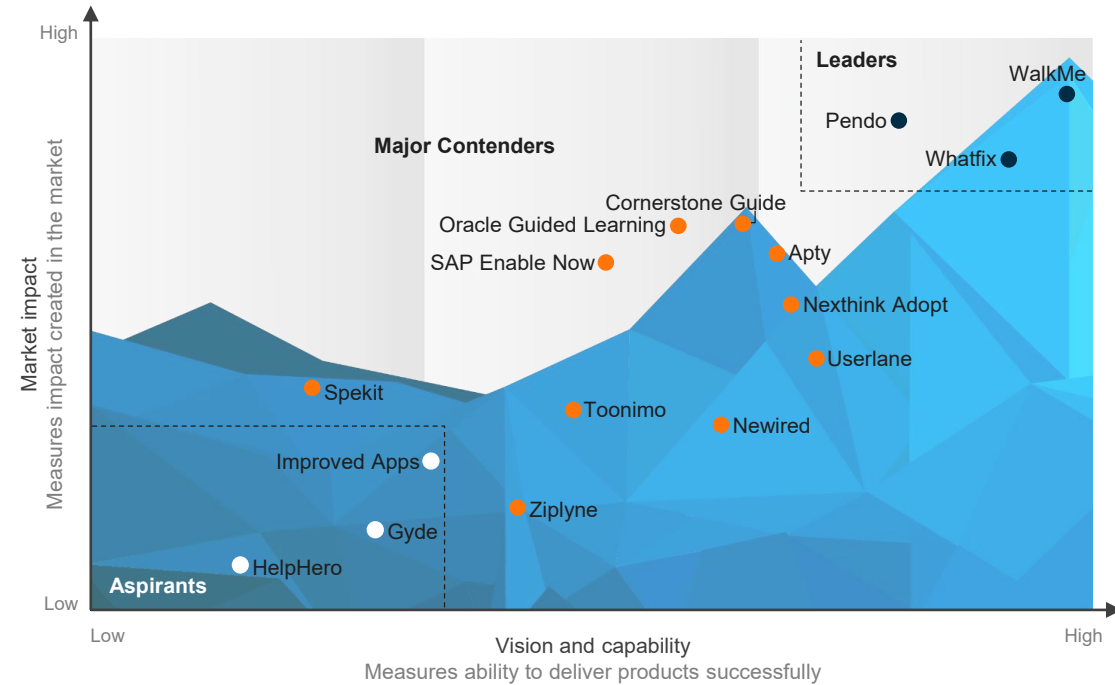


# This study offers distinct chapters providing a deep dive into key aspects of the North America market; below are three charts to illustrate the depth of the report

## Everest Group PEAK Matrix® Assessment 2024

### Everest Group Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2024<sup>1</sup> – North America

● Leaders ● Major Contenders ○ Aspirants



<sup>1</sup> Assessment for HelpHero, Nextthink Adopt, Spekit, Toonimo, and Ziplyne 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  
Source: Everest Group (2024)

## Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall
Provider 1	●	●	●	●	●	●	●	●	●	●
Provider 2	●	○	●	●	●	○	●	○	○	●
Provider 3	●	●	●	●	●	●	●	●	●	●
Provider 4	○	○	●	●	○	○	●	○	○	●
Provider 5	●	●	●	●	●	●	●	●	●	●
Provider 6	○	○	●	○	●	○	○	○	○	○

## Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

	Market impact				Vision and 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

- Focused on the North American market, Provider 1 excels in providing in-app support. It primarily targets XYZ and DEF use cases
- In addition to supporting XYZ deployments, it has provisions for ABC and DEF options to give flexibility to its clients who might have data privacy concerns

### Limitations

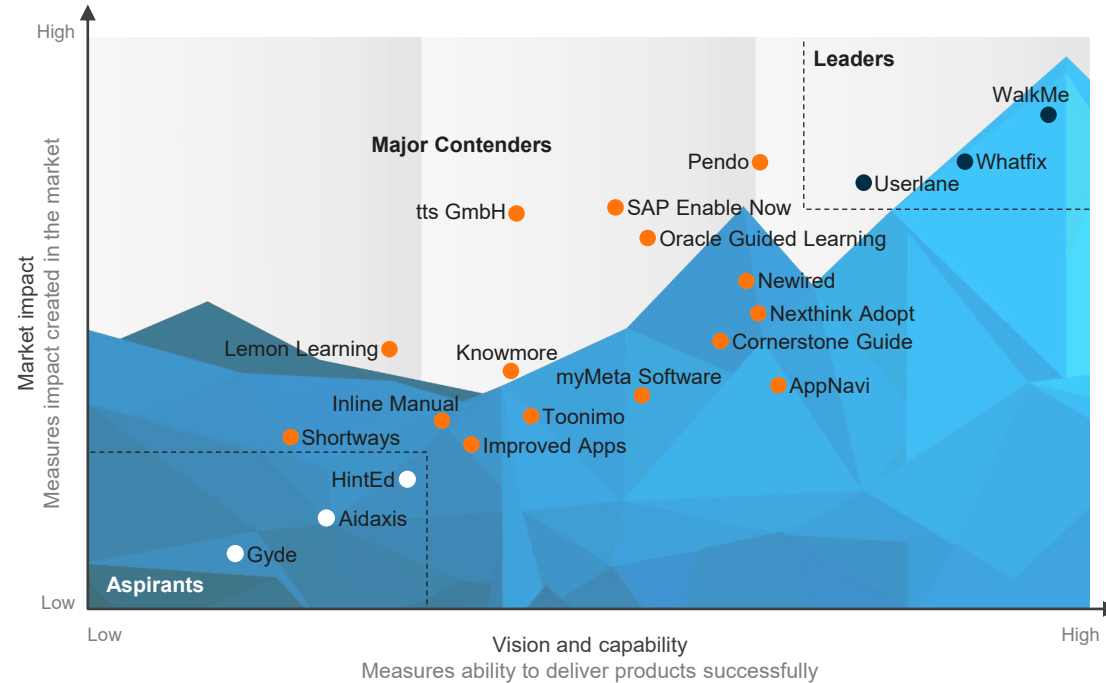
- Provider 1 should increase offerings of value-added services such as strategic planning and creation of CoEs
- It should try to expand into larger multi-country deals and also scout for engagements in other European markets to strengthen its presence in the region

# This study offers distinct chapters providing a deep dive into key aspects of the Europe market; below are three charts to illustrate the depth of the report

## Everest Group PEAK Matrix® Assessment 2024

### Everest Group Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2024<sup>1</sup> – Europe

● Leaders ● Major Contenders ○ Aspirants



<sup>1</sup> Assessment for Nextthink Adopt, Toonimo, and tts GmbH 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  
Source: Everest Group (2024)

## Capability assessment

Illustrative example

Measure of capability: ☐ Low ● High

Providers	Market impact				Vision and capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall
Provider 1	☐	☐	●	●	●	☐	☐	●	●	●
Provider 2	●	●	●	●	●	●	●	●	●	●
Provider 3	☐	☐	●	●	●	☐	●	●	●	●
Provider 4	●	☐	●	●	●	☐	●	☐	☐	●
Provider 5	●	●	●	●	●	●	●	●	●	●
Provider 6	●	●	●	●	●	●	●	●	●	●

## Everest Group's remarks on providers

Illustrative example

Measure of capability: ☐ Low ● High

Market impact				Vision and 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

- Headquartered in XYZ with a client base primarily in Europe, Provider 1 adopts an ABC approach to deliver tailored solutions to help users navigate any application
- It supports XYZ deployment options providing flexibility to clients and is certified to ABC enhancing its commitment to data security and privacy

### Limitations

- At present, the provider's partner ecosystem has limited reach and capabilities which can be a hurdle for companies looking for Sis to deploy the product
- It should try to expand into larger multi-country deals and also scout for engagements in other markets to strengthen its presence

# Research calendar

## Human Resources

	Published	Current release	Planned
Reports title	Release date		
Digital Adoption Platforms (DAP) State of the Market 2023 – Update			December 2023
Multi-process Human Resources Outsourcing (MPHRO) State of the Market 2023			December 2023
Rewards and Recognition (R&R) State of the Market 2023: Exploring the Next-Generation of R&R Platforms			December 2023
Multi-country Payroll (MCP) Solutions – State of the Market 2023 – Update			January 2024
Evolving with AI: the Rise of Next-Generation Digital Adoption Platforms (DAPs)			March 2024
Reaping the Benefits of Unified Pay Solutions: Saying Goodbye to Payday Puzzles			April 2024
People Analytics Platforms PEAK Matrix® Assessment 2024			April 2024
Introduction to the Skills Intelligence Technology Landscape			April 2024
The Skills Intelligence Technology Landscape: Focus on Talent Management			May 2024
The Skills Intelligence Technology Landscape: Focus on Talent Acquisition			May 2024
People Analytics Platforms – Provider Compendium 2024			June 2024
<b>Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2024</b>			<b>September 2024</b>
Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2024			Q3 2024
Employer of Record (EOR) Solutions PEAK Matrix® Assessment 2024			Q3 2024
Digital Adoption Platforms (DAP) – Provider Compendium 2024			Q4 2024
Multi-Country Payroll (MCP) Solutions State of the Market 2024			Q4 2024

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