



# Digital Interaction Intelligence State of the Market 2024

November 2024: Complimentary Abstract / Table of Contents

State of the Market Report  
Service Optimization Technologies



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- ▶ Payer and Provider Information Technology
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- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
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- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
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# Contents

5	Introduction and overview	30	Adoption by buyer process/function
6	Research methodology	31	Adoption by buyer size
7	Key information on the report	32	<b>Buyer insights</b>
8	Background of the research	33	Buyer satisfaction   drivers for DII adoption
9	How to read this document	34	Buyer satisfaction   product capabilities
10	<b>Summary of key messages</b>	35	Key strengths and areas of improvement
15	<b>Overview of process intelligence</b>	36	Key barriers to DII adoption
16	Introduction to process intelligence	37	Best practices
17	Types of process intelligence solutions	38	<b>DII solution characteristics</b>
18	Understanding Digital Interaction Intelligence (DII)	39	Elements of solution characteristics
19	Objectives/challenges across key enterprise stakeholders	40	Training and support
20	Applications and benefits of DII solutions	41	Talent
22	Top use cases of DII	43	Partner ecosystem
26	<b>DII market characteristics</b>	46	Deployment model and product architecture
27	DII software market size and growth by revenue	48	Commercial model
28	Adoption by buyer geography	50	<b>DII product capabilities and trends</b>
29	Adoption by buyer industry		

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# Contents

63	DII provider landscape
64	Market share and growth by license revenue
65	Market share and growth by number of clients
66	Providers with the largest share of DII software revenue in the top industry verticals
67	Providers with the largest share of DII software revenue in major geographies
68	Providers with the largest share of DII software revenue across buyer segments
69	Outlook for 2024-25
72	Appendix
73	Glossary
75	Research calendar

# Background of the research

Everest Group defines Digital Interaction Intelligence (DII) as a type of analytics product that provides a fact-based, technology-driven approach to understanding user interactions on various applications, especially business applications. DII adopts a user-centric lens as opposed to process mining solutions' process-centric lens, resulting in a more granular understanding of as-is processes. This has led to DII being one of the fastest-growing markets in the Intelligent Automation (IA) space. The adoption of DII solutions not only helps enterprises to achieve cost savings and operational efficiencies by optimizing/automating tasks, it also enhances Employee Experience (EX) through better resource allocation. While DII can play a key role in the success of an organization's digital transformation journey, the DII technology is relatively new to many potential buyers in terms of product capabilities, features, and commercial models.

In this study, we assess DII software products that can capture user actions and metadata that are performed together on multiple desktops, to virtually reconstruct and analyze processes that are available independent of professional services.

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

- Overview of process intelligence software products
- Everest Group's PEAK Matrix® evaluation, a comparative assessment of 19 leading DII technology providers
- Competitive landscape of the DII technology provider market
- Key DII technology trends
- Remarks on the key strengths and limitations of each DII technology provider

**This report includes the profiles of the following 19 leading technology providers featured on the DII PEAK Matrix®:**

- **Leaders:** EdgeVerve, KYP.ai, Mimica, Skan, Soroco, and UiPath
- **Major Contenders:** ABBYY, Automation Anywhere, Celonis, Epiance, IBM, Microsoft, NICE, Nintex, Pega, StereoLOGIC, and UltimateSuite
- **Aspirants:** Cyclone Robotics and Optimus Hive

## Scope of this report

**Geography:** Global

**Product:** Digital Interaction Intelligence (DII)

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

This research provides DII buyers, software providers, and third-party enablers (service providers and system integrators) a detailed view of the DII market and analyzes it across dimensions, including market size and adoption trends, solution characteristics, product capabilities and trends, provider landscape, and outlook for 2024-25.

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

#### Overview of process intelligence

- DII solutions capture user actions and metadata, such as keystrokes and mouse clicks, to create UI logs, generating digital interaction graphs, capturing different process variants, and extracting relevant business insights
- DII solutions leverage user action recording / screen recording to capture steps taken by users outside of IT systems and generate task and process maps and derive relevant business insights for process improvement

#### DII market overview

- The DII market has been experiencing exponential YoY growth and is expected to reach US\$600 million by the end of 2025
- North America and Continental Europe continue to dominate DII adoption, while MEA and the UK emerge as the fastest-growing regions
- The BFSI sector leads in DII adoption, while travel and logistics and CPG and retail sectors experience the highest growth rates

#### Buyer insights

- Buyers indicated varying levels of satisfaction with the features and functionalities offered by providers due to the differentiation in parameters specific to each provider
- Many buyers acknowledged product support as a key strength; however, they expect the providers to offer generative AI features and enhanced integration with other complementary capabilities in DII solutions

#### DII solution characteristics

- DII providers are increasingly using online training portals to offer product training in addition to classroom training and embedded help tools to aid users

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

- Providers continue to expand their product development and support teams to keep pace with product innovations and better support customers

### DII product capabilities and trends

- Driven by significant innovation over the past few years, task mining has evolved from being a tactical to strategic function
- To help enterprises achieve greater business value, process mining technology continues to evolve with a host of new and native capabilities across several dimensions

### DII provider landscape

- Soroco is the top provider in terms of software revenue; KYP.ai, Optimus Hive, Skan, and UltimateSuite achieved strong YoY growth
- Celonis, StereoLOGIC, and UiPath are the top providers by DII clients; many providers doubled their client base in the past year

### Outlook for 2024-25

- Current macroeconomic conditions will drive increased adoption of DII across industries such as travel and logistics, CPG and retail, and manufacturing sectors
- Providers are investing in native generative AI models for task extraction, insights generation, process documentation, and identification of task improvement opportunities

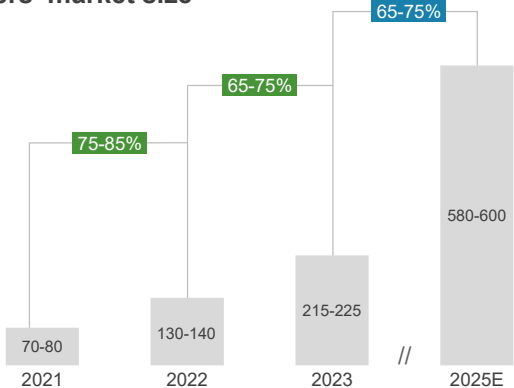
# This study offers seven distinct chapters providing a deep dive into key aspects of the DII market; below are four charts to illustrate the depth of the report

## DII market overview


### DII independent technology providers' market size

Revenue in US\$ million


XX Actual growth rate / YoY  
XX Expected CAGR  
 E = Estimate




## Best practices




Increase awareness




Start with a simple project




Train/Upskill employees



Ensure data availability and quality



Get buy-in from the leadership and enterprise IT



Collaborate with business units and CoEs

## DII solution characteristics



Training and support

Talent

Partner ecosystem

Deployment model and product architecture

Commercial models

## DII provider landscape

Providers by number of DII clients  
(Providers are listed in alphabetical order within each category)

>200	  
101-200	   
30-100	       
<30	   



# Research calendar

## Service Optimization Technologies

	Published	Current release	Planned
Reports title	Release date		
Process Orchestration Products PEAK Matrix® Assessment 2023 – Update			November 2023
Robotic Process Automation (RPA) – Technology Provider Compendium 2023			December 2023
Process Orchestration Products – Provider Compendium 2023 – Update			December 2023
Process Orchestration State of the Market 2023 – Update			December 2023
Robotic Process Automation (RPA) State of the Market 2023 – Update			December 2023
Intelligent Document Processing (IDP), Banking IDP, and Insurance IDP Products PEAK Matrix® Assessments 2024			March 2024
Intelligent Process Automation (IPA) Solutions PEAK Matrix® Assessment 2024			April 2024
Intelligent Document Processing (IDP) – Provider Compendium 2024			May 2024
Intelligent Document Processing (IDP) State of the Market 2024			June 2024
Process Mining Products PEAK Matrix® Assessment 2024			June 2024
Process Mining – Provider Compendium 2024			July 2024
Digital Interaction Intelligence Products – Technology Provider Compendium 2024			October 2024
<a href="#">Digital Interaction Intelligence State of the Market 2024</a>			November 2024
Process Orchestration Products PEAK Matrix® Assessment 2024			Q4 2024
Process Orchestration Products – Provider Compendium 2024			Q4 2024

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