



Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2021

August 2021



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- ▶ Supply Chain Management (SCM) Services
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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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01

Introduction and overview

- Research methodology
- Background and scope of the research
- Understanding DAPs

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

F&A pyramid, multi-process FAO definition, Total Value Equation (TVE), PEAK Matrix®, market maturity

02

Primary sources of information

Annual contractual and operational RFIs, service provider briefings and buyer interviews, web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers

Ongoing interactions with DAP vendors and buyer organizations (updated annually)

Year-round tracking of 25+ DAP service providers

Large repository of existing research in DAP

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, service providers, technology providers, and industry associations

Everest Group's DAP research is based on multiple sources of proprietary information

Proprietary database of ~20 DAP technology vendors

The database tracks the following elements for each vendor:

- Breadth and depth of the product functionalities
- Analytics, reporting, and dashboards
- Investments and innovations
- Partnerships with service providers and other technology vendors
- Support in terms of product training, maintenance, consulting, and other support services
- Availability and adoption of commercial model(s)
- Portfolio coverage in terms of industry, geography, process areas, and buyer size
- Vendor performance in terms of revenue and clients

Demonstrations and interactions with technology vendors and other industry stakeholders

- Detailed demos and interviews with DAP technology vendors for a comprehensive view of the products
- Interviews with technology vendors' reference clients
- Executive-level discussions with technology vendors as well as service providers that cover:
 - Current state of the market
 - Opportunities and challenges
 - Expected direction of movement in the industry
 - Technology vendor / service provider 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
 - Outcomes achieved
 - Buying criteria
 - Future direction
 - Apprehensions and challenges

Proprietary database of RPA and AI capabilities of ~100 leading technology vendors 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

Vendors assessed in the PEAK Matrix® analysis¹



¹ Assessments for HelpHero and Helppier exclude vendor inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, technology vendor 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

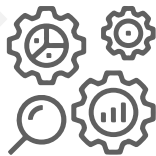
In 2020, many companies hopped on to the bandwagon of digital transformation to tackle the pandemic and sustain their operations as COVID-19 set limitations on workforce collaboration in office and business operations in offline mode. This further reinforced the roles DAPs have the potential to play. Enterprises realized the need to put additional emphasis on customer and user experience as the concerned stakeholders adapted to the digital way of operating. Additionally, organizations looked for solutions that can help them realize the maximum benefit from these investments through a holistic approach to reduce the time taken for users to adopt the applications.

DAPs provide users guidance in the flow of work that helps enterprises achieve their business goals such as boosting employee efficiency, reducing support tickets and costs, improving customer satisfaction scores, increasing trial conversion, as well as minimizing customer churn, among others. Vendors are continuously investing in enhancing their DAP capabilities and global outreach to better serve the clients. The technologies used in DAPs are evolving with several additions in offerings such as user behavior analytics without deploying walkthroughs, integrated chatbots, content management and aggregation systems, and enhanced content editing options, to cite a few examples.

In this research, we focus on:

- Everest Group's DAP Products PEAK Matrix® evaluation, a comprehensive assessment of 18 DAP technology vendors
 - 2021 DAP PEAK Matrix®
 - Technology vendor capability assessment
- Remarks on key strengths and limitations for each DAP technology vendor
- Technology vendor landscape

Scope of this report:



Assessment

Assessing DAP software available in the market for independent licensing. Operational and product information as of Q1 2021



Coverage

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



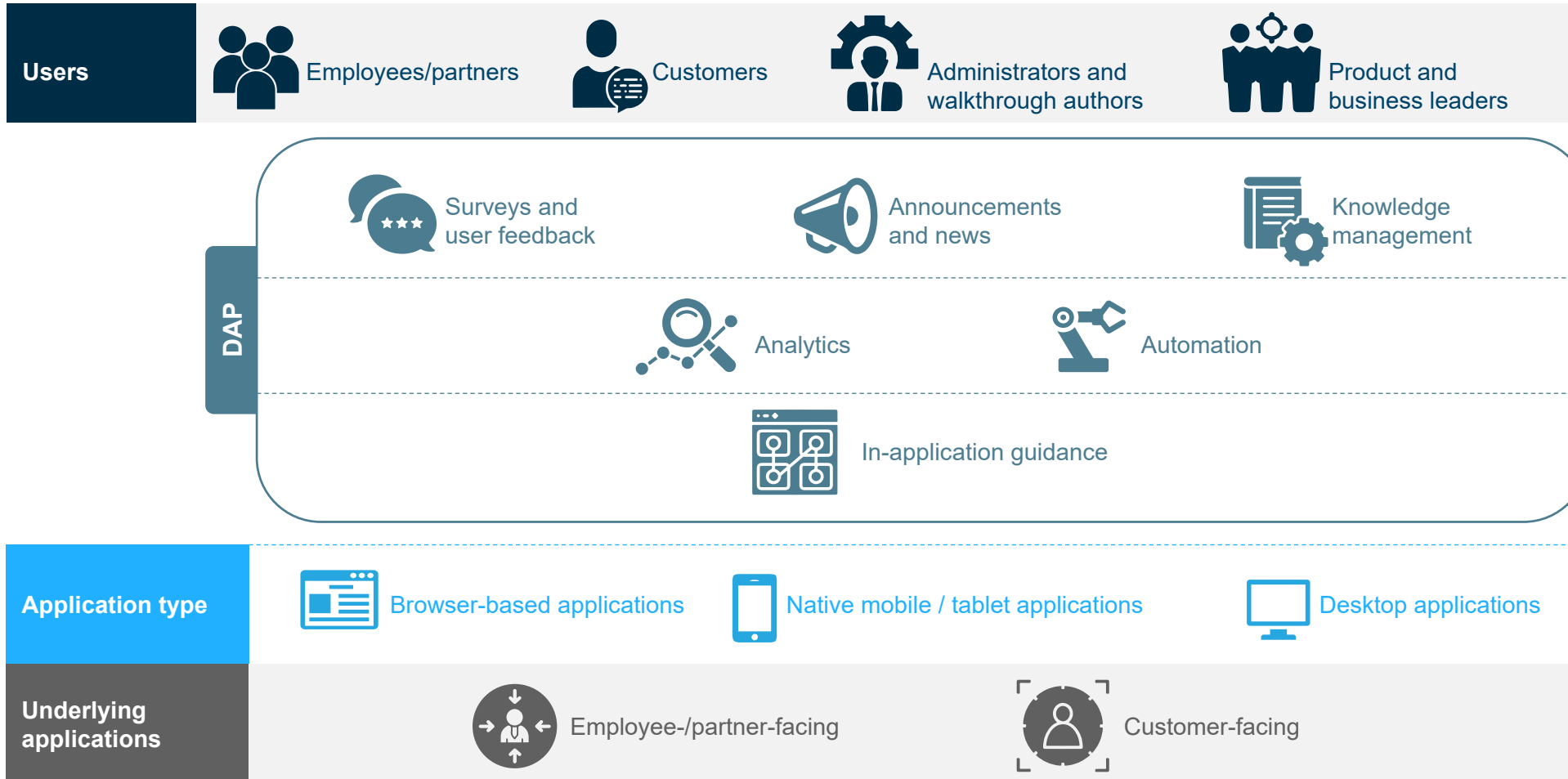
Technology vendors

Coverage across 18 DAP technology vendors including Aidaxis, AppLearn, AppNavi, Apty, HelpHero, Helpier, HintEd, Knowmore, MyGuide by EdCast, Newired, OnScreen, Pointzi, tts GmbH, Userlane, WalkMe, Whatfix, YesElf, and Ziplyne

Understanding DAPs (page 1 of 3)

DAPs are overlay solutions that are designed to facilitate seamless adoption and learning of the underlying applications

NOT EXHAUSTIVE



Key benefits

- Enhanced adoption and utilization
- Better user experience
- Increased user productivity
- Reduced training and support costs

Understanding DAPs (page 2 of 3)

DAPs, apart from in-app guidance, also offer other capabilities to further track and engage the end users with both the underlying application and the DAP

NOT EXHAUSTIVE



In-app guidance

This is the core functionality and helps users complete a specific process using step-by-step guidance to better adopt the underlying application. This is typically accomplished through features such as walkthroughs and tooltips



Analytics

Ability to offer insights across user interaction with DAP content, as well as interaction with the underlying application. Provides the organization's leadership ability to understand the adoption of their digital assets and identify improvement areas



Automation

Offering automated walkthroughs and getting user inputs only when necessary, thereby minimizing the number of empty clicks by users and increasing productivity



Surveys and user feedback

Ability to embed surveys and get responses to important questions. Additionally, it is also used to gather valuable insights from users to measure overall satisfaction such as Customer Satisfaction (CSAT) and Net Promoter Score (NPS) from the product as well as from the DAP content



Announcement and news

This enables enterprises to provide users with up-to-date information regarding the application, push new content, inform about new feature releases, or share company news with employees



Knowledge management

Provides the ability to convert the walkthroughs to other formats such as PDFs and slideshows. Also enables users to access the relevant information from the self-help widgets and centralized knowledge portals

Understanding DAPs (page 3 of 3)

ILLUSTRATIVE

DAPs offer various features to help users complete and learn processes within the underlying application, in addition to providing contextual help, announcements and the ability to gather user feedback

Walkthrough

A step-by-step guide that helps users complete a process with the help of different features

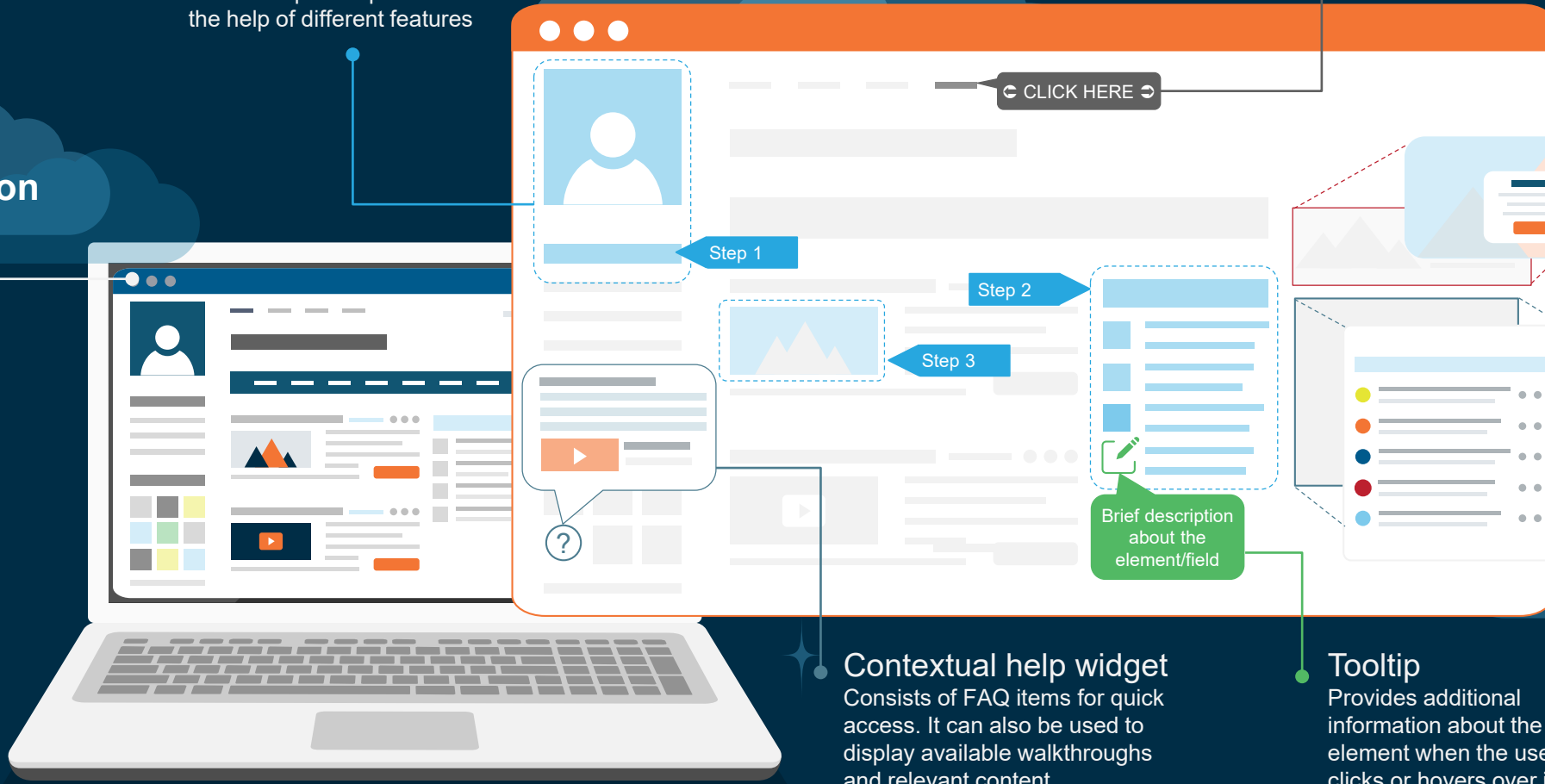
Balloon

Gives details about a step and helps users to interact with the underlying application



Survey / user feedback
Gathers user feedback regarding the guidance provided, content, NPS, or more

Application



Pop-up

Used for company-wide announcements/news. It can also be used to notify users about new features

Checklist

Showcases important tasks that need to be fulfilled by the users and indicates the progress

Contextual help widget

Consists of FAQ items for quick access. It can also be used to display available walkthroughs and relevant content

Tooltip

Provides additional information about the element when the user clicks or hovers over it

02

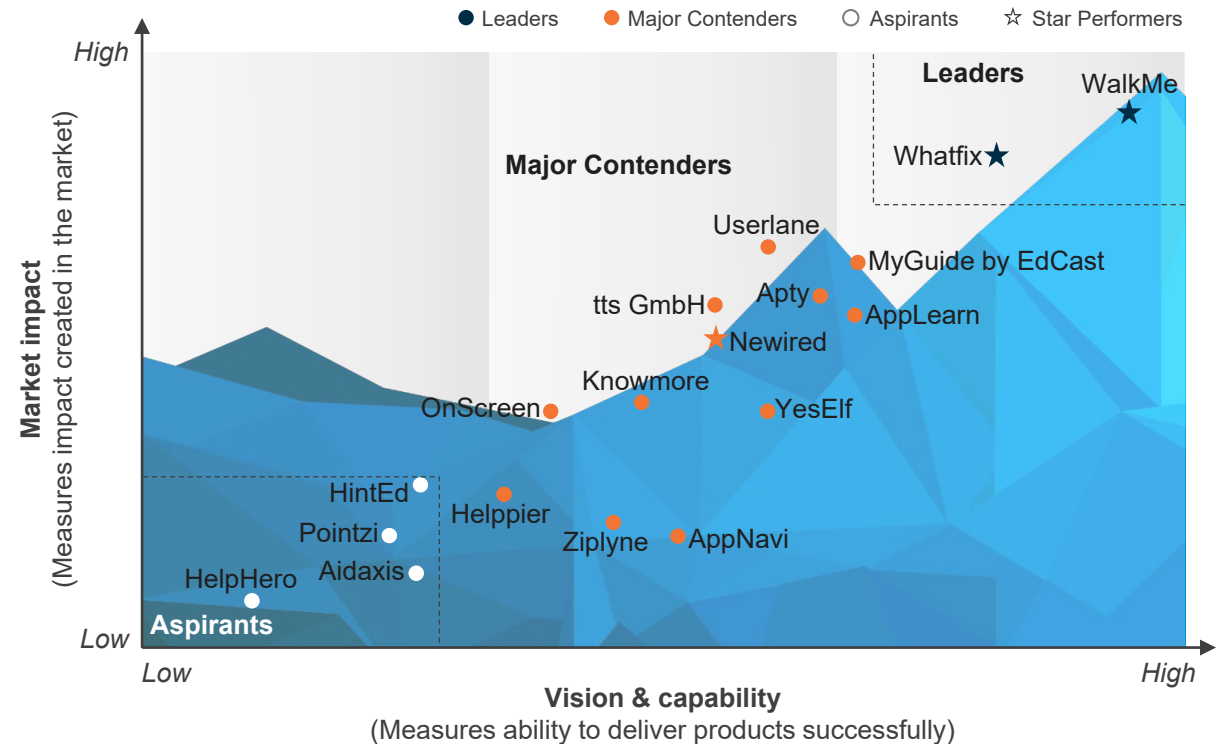
Summary of key messages



Summary of key messages

- The Products PEAK Matrix® is a proprietary framework used to assess the market impact and overall vision & capability of technology vendors
- Everest Group classifies 18 DAP technology vendors on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants:
 - **Leaders:** WalkMe and Whatfix
 - **Major Contenders:** AppLearn, AppNavi, Apty, Helppier, Knowmore, MyGuide by EdCast, Newired, OnScreen, tts GmbH, Userlane, YesElf, and Ziplyne
 - **Aspirants:** Aidaxis, HelpHero, HintEd, and Pointzi
- Based on Year-on-Year (YoY) movement of different DAP vendors on the PEAK Matrix®, Everest Group identified three technology vendors as the “2021 DAP Market Star Performers” – Newired, WalkMe, and Whatfix
- WalkMe had the highest DAP market share in 2020; Whatfix, tts GmbH, MyGuide by EdCast, Userlane, AppLearn, and Apty have reasonable market shares
- WalkMe continues to serve the majority of the DAP clients in the market, followed by Whatfix, tts GmbH, Userlane, MyGuide by EdCast, Apty, and AppLearn

Everest Group Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment 2021¹



¹ Assessments for HelpHero and Helppier exclude vendor inputs and are based on Everest Group’s proprietary Transaction Intelligence (TI) database, technology vendor public disclosures, and Everest Group’s interactions with DAP buyers.

Note: Star Performers are selected based on a relative comparison of vendors’ performance on the market impact and vision & capability dimensions in the previous and latest PEAK Matrix® assessments. Vendors with the highest year-over-year 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 (2021).

03

DAP PEAK Matrix[®] characteristics

- Products PEAK Matrix evaluation dimensions

- DAP Products PEAK Matrix[®] 2021

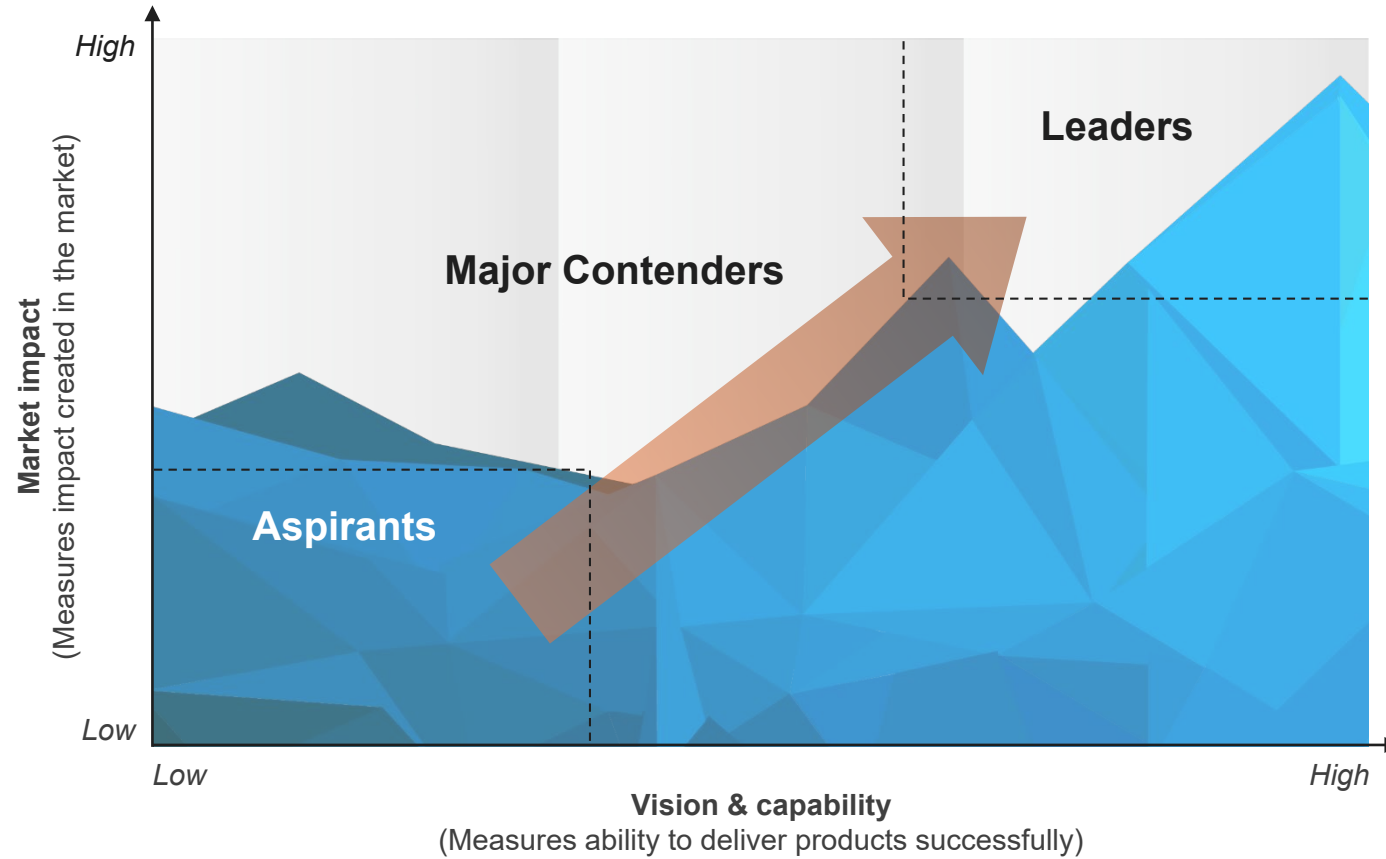
- Characteristics of Leaders, Major Contenders, and Aspirants

- Distinguished features of Star Performers

- Technology vendor capability summary dashboard

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

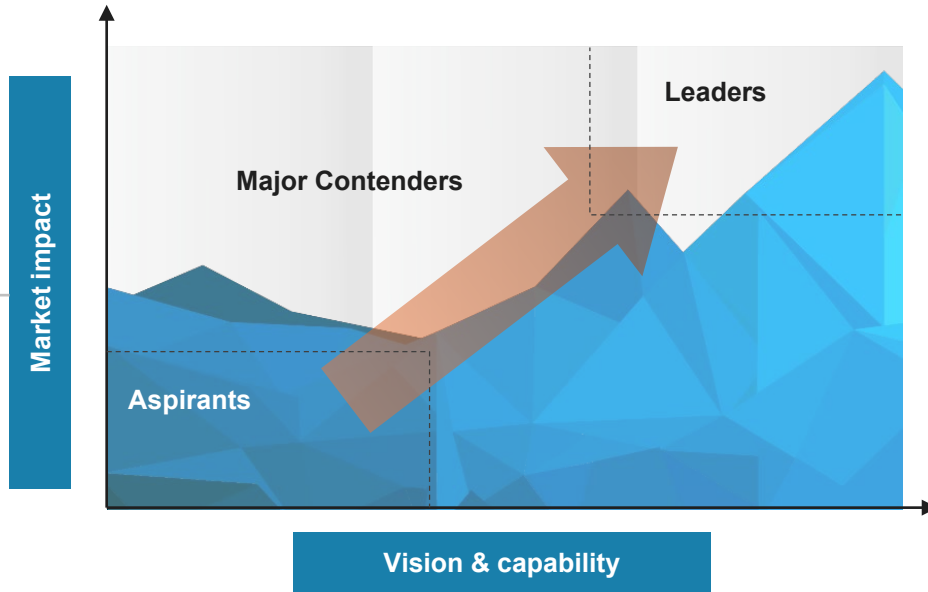
Everest Group PEAK Matrix



Products PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, and YoY growth
Portfolio mix
Diversity of client base across industries, geographies, environments, and enterprise size class
Value delivered
Value delivered to the client based on customer feedback and other measures



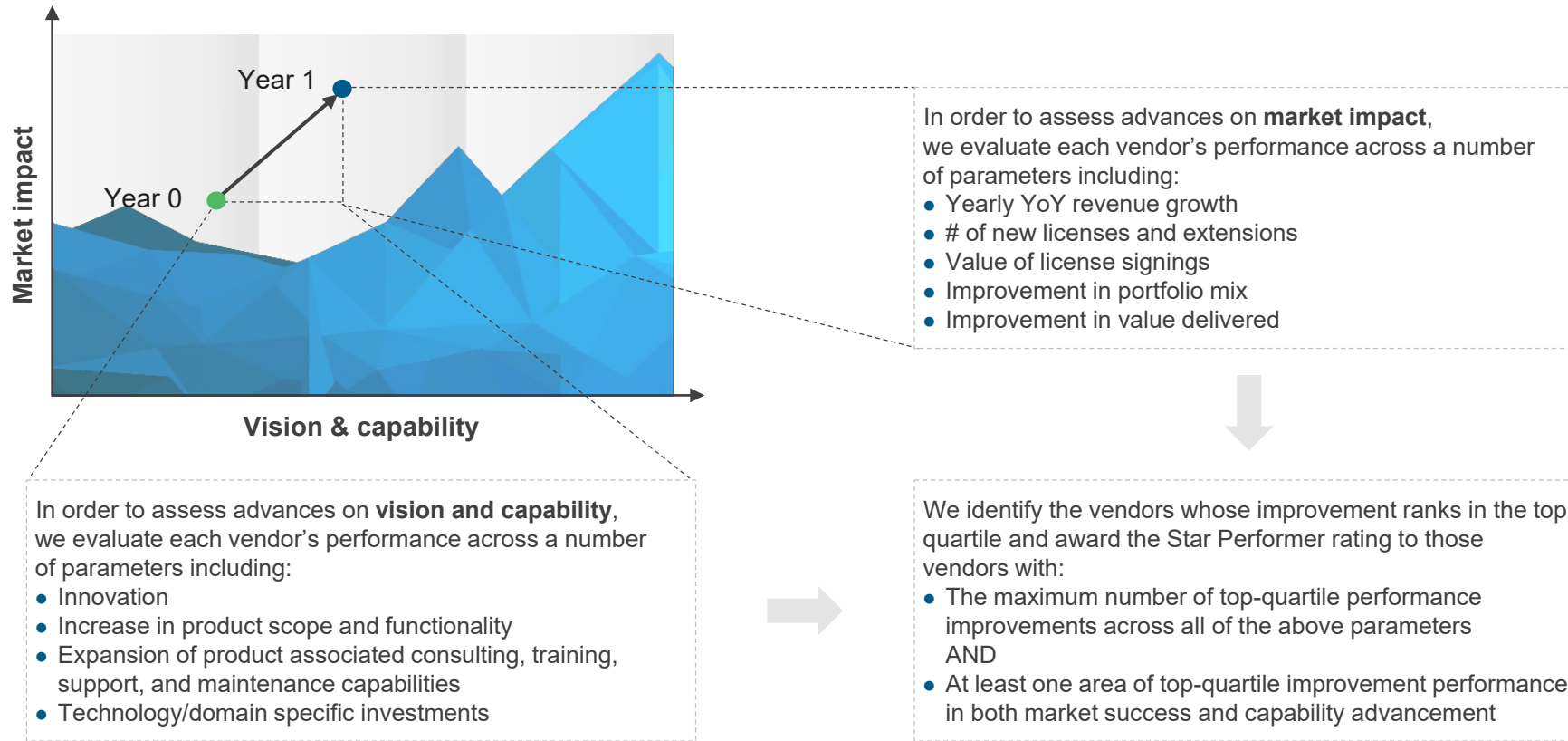
Measures ability to deliver products successfully. This is captured through five subdimensions

Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model
Vision for the client and itself; key investments, future roadmap, and strategy	Technical sophistication and breadth/depth across the product, including customizability, data security, and compliance	Breadth/depth of analytics including usage analytics, user behavior tracking, and workflow analytics	Deployment options, training and certification, product maintenance, support services, and partnership ecosystem	Progressiveness, effectiveness, and flexibility of engagement and commercial models

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



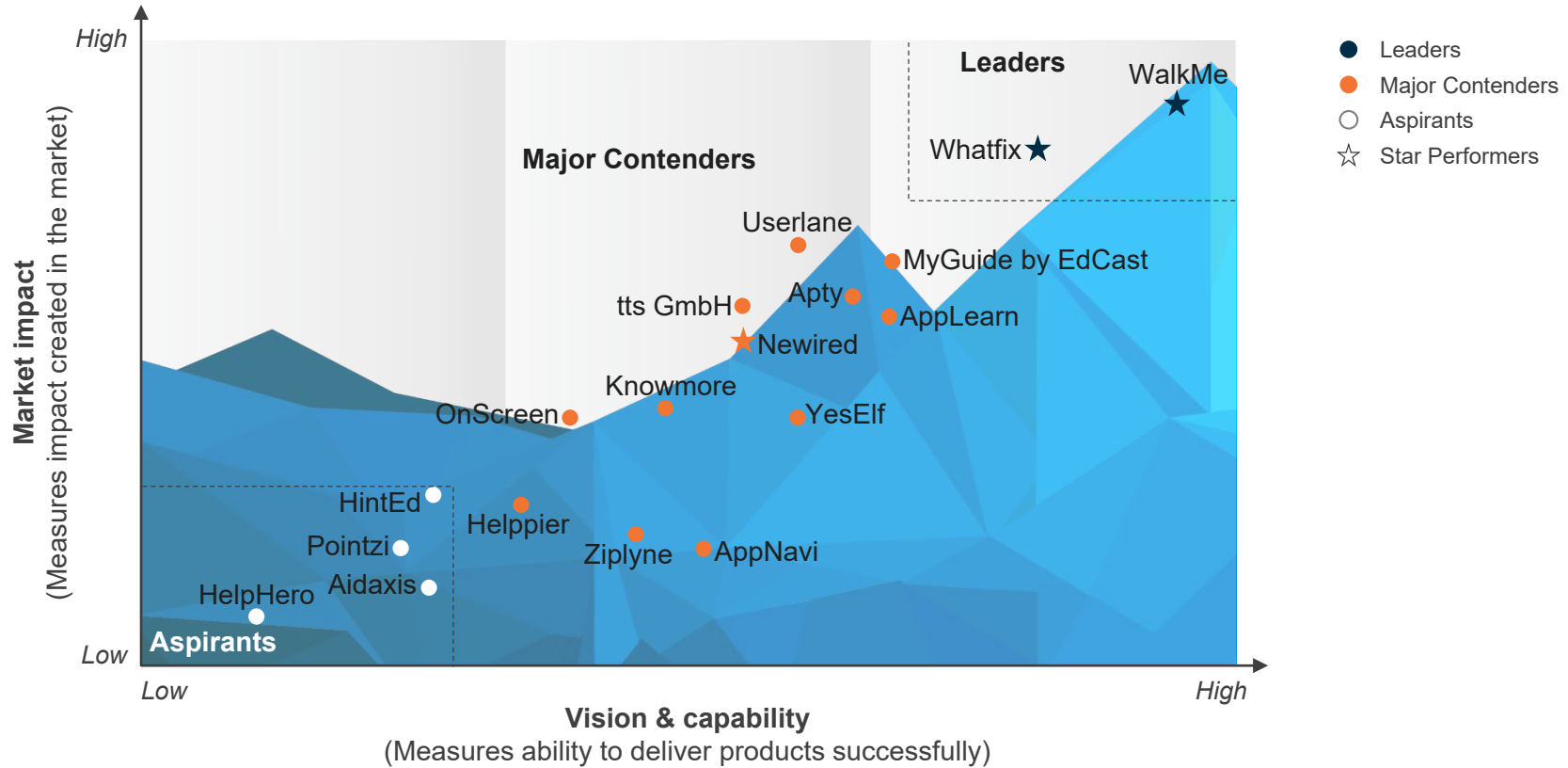
The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

Everest Group PEAK Matrix®

Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment 2021



Everest Group Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment 2021¹



¹ Assessments for HelpHero and Helppier exclude vendor inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, technology vendor public disclosures, and Everest Group's interactions with DAP buyers.

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Source: Everest Group (2021).

Characteristics of Leaders, Major Contenders, and Aspirants

Leaders:

WalkMe and Whatfix

- Leaders have a strong vision and the capability to drive a holistic digital adoption with use cases across multiple platforms and applications. They have invested in developing advanced DAP capabilities such as automatic guide testing, next-generation technologies including AI, automation, advanced analytics, and integrations with business applications
- They have an increased focus on strengthening the partner ecosystem with System Integrators (SIs), training partners, resellers, Independent Software Vendors (ISVs), and technology partners, to help them bring in more functionalities and increase their global outreach, among other benefits
- Leaders continue to play a pivotal role in educating the market, increasing awareness about DAPs' benefits, training content creators and end-users, offering professional certification courses, and helping clients set up Centers of Excellence (CoEs) and forums/communities
- They have well-balanced portfolios across buyer sizes, geographies, and industries. Leaders have proven expertise in successfully implementing DAPs on multiple applications for global clients, with large and complex requirements

Major Contenders:

AppLearn, AppNavi, Apty, Helppier, Knowmore, MyGuide by Edcast, Newired, OnScreen, tts GmbH, Userlane, YesElf, and Zipllyne

- Although Major Contenders are investing in developing better functionalities, they still lag behind Leaders in terms of breadth and depth of product capability
- Some of the Major Contenders are focusing on developing extensive analytics capabilities to track user pain points and define goals / Objectives and Key Results (OKRs). They also leverage this as a unique value proposition for their clients
- Major Contenders have comparatively limited geographic coverage and are focusing on advancing their reach to other major geographies via direct sales and partner-led approaches. They are also making efforts to expand their footprint within the large clients' segment, while continuing to serve small and medium enterprises

Aspirants:

Aidaxis, HelpHero, HintEd, and Pointzi

- Aspirants are relatively new entrants in the market and are currently making investments to improve their core capability for DAP in addition to walkthroughs and basic analytics. The majority of them continue to focus on web-based applications
- While some of the vendors have started expanding to other key geographies, the majority of the Aspirants continue to serve their primary geography and are more dedicated to serving small and medium enterprises

Everest Group has identified three technology vendors as the 2021 Star Performers

(page 1 of 2)

DAP technology Star Performers

Distinguishing features of market success in 2020

Distinguishing features of capability advancements in 2020

Change in PEAK Matrix® positioning for Digital Adoption Platform



- Achieved strong YoY growth in realized revenue in 2020
- Experienced above-average YoY market growth in terms of number of clients
- Expanded its presence in the US, the UK, and the Asia Pacific markets, also acquired larger buyers

- Continues to invest in enhancing the robustness and sophistication of the product – focused on the architecture, element detection, and content creator experience
- Improved content export, review, and approval process for administrators requiring QA checks
- Notably expanded the reach of its DAP certification program to content creators and administrators

Strengthened its Major Contenders positioning



- Registered the highest increase in absolute realized revenue (>US\$ 35 million)
- Recorded as one of the top vendors in terms of increase in its client base during 2019-20
- Features among the top vendors by market share by revenue and clients, industries, and geographies served
- Received one of the highest buyer satisfaction / value delivered scores for 2020

- Significantly enhanced its DAP capabilities by adding features such as CIO dashboard, DXA insights, and session playbacks
- Improved its product capability with its acquisition of Zest and improvements in web-, mobile-, and desktop-based applications
- Continues to be a leader in offering DAP training and professional certifications to partners, customers, and the general public
- Strengthened its partner network – the largest in the market – with resellers, SIs, ISVs, and technology vendors to better serve its clients

Strengthened its Leaders positioning

Source: Everest Group (2021)

Everest Group has identified three technology vendors as the 2021 Star Performers

(page 2 of 2)

DAP technology Star Performers



Distinguishing features of market success in 2020

- Achieved the second highest increase in annual realized license revenue in 2020
- Achieved one of the highest YoY client growth rates in 2020
- Acquired the highest number of DAP clients vis-à-vis last year
- Continues to feature among the top vendors (by market share) across key verticals

Distinguishing features of capability advancements in 2020

- Enhanced product capabilities to support mobile- and desktop-based applications
- Invested in its analytics to include "behavioral analytics" capabilities to enable enterprises to track application utilization and drop offs pre-deployment
- Improved its feature set by offering value-added capabilities such as content aggregation and CoEs
- Continued building its partnership ecosystem with SIs and ISVs as part of its go-to-market strategy





















Change in PEAK Matrix® positioning for Digital Adoption Platform

**Strengthened its Leaders
positioning**

Summary dashboard | market impact and vision & capability assessment of technology vendors for DAP

Leaders



























































































Measure of capability:  Low  High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
WalkMe										
Whatfix										

Summary dashboard | market impact and vision & capability assessment of technology vendors for DAP

Major Contenders (page 1 of 2)































Measure of capability:  Low  High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
AppLearn										
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Apty										
Helppier										
Knowmore										
MyGuide by EdCast										
Newired										
OnScreen										
tts GmbH										

Summary dashboard | market impact and vision & capability assessment of technology vendors for DAP

Major Contenders (page 2 of 2)









































Measure of capability:  Low  High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
Userlane										
YesElf										
Ziplyne										

Summary dashboard | market impact and vision & capability assessment of technology vendors for DAP

Aspirants































Measure of capability:  Low  High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
Aidaxis										
HelpHero										
HintEd										
Pointzi										

Summary dashboard | market impact and vision & capability assessment of technology vendors for DAP

Star Performers

Measure of capability:  Low  High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
Newired										
WalkMe										
Whatfix										

04

DAP market – competitive landscape

WalkMe had the highest DAP market share in 2020; Whatfix, tts GmbH, MyGuide by EdCast, Userlane, AppLearn, and Apty have reasonable market shares

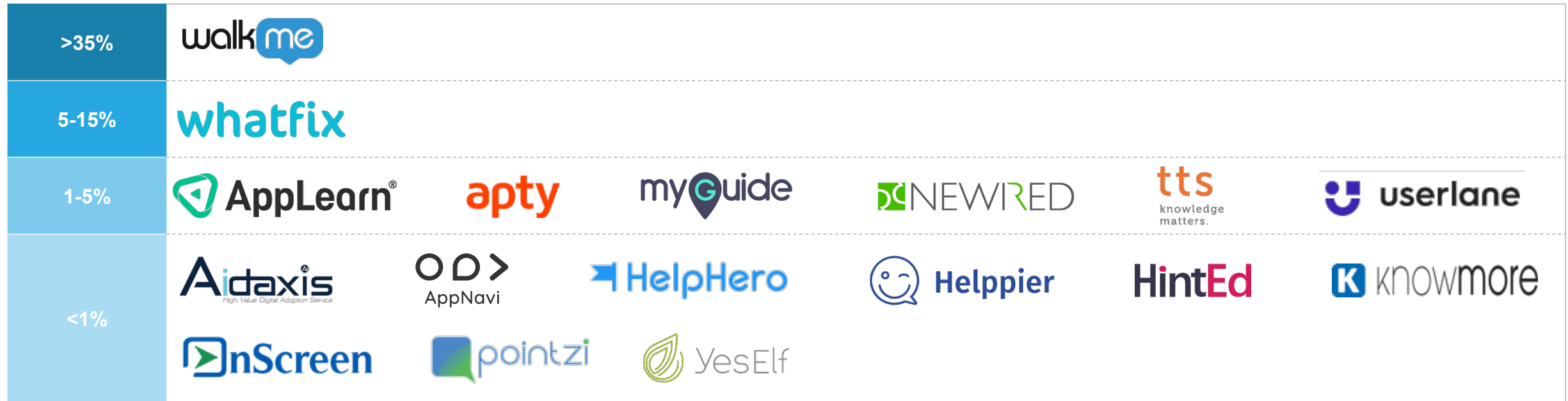
Vendors' DAP market share by annual realized license revenue; 2020
(Vendors are listed in alphabetical order within each category)



Note: Market share is calculated based on the overall market size and considers revenues of other vendors including Pendo, Appcues, UserIQ, and GainsightPX.
Source: Everest Group (2021)

WalkMe continues to serve the majority of the DAP clients in the market, followed by Whatfix, tts GmbH, Userlane, MyGuide by EdCast, Apty, and AppLearn

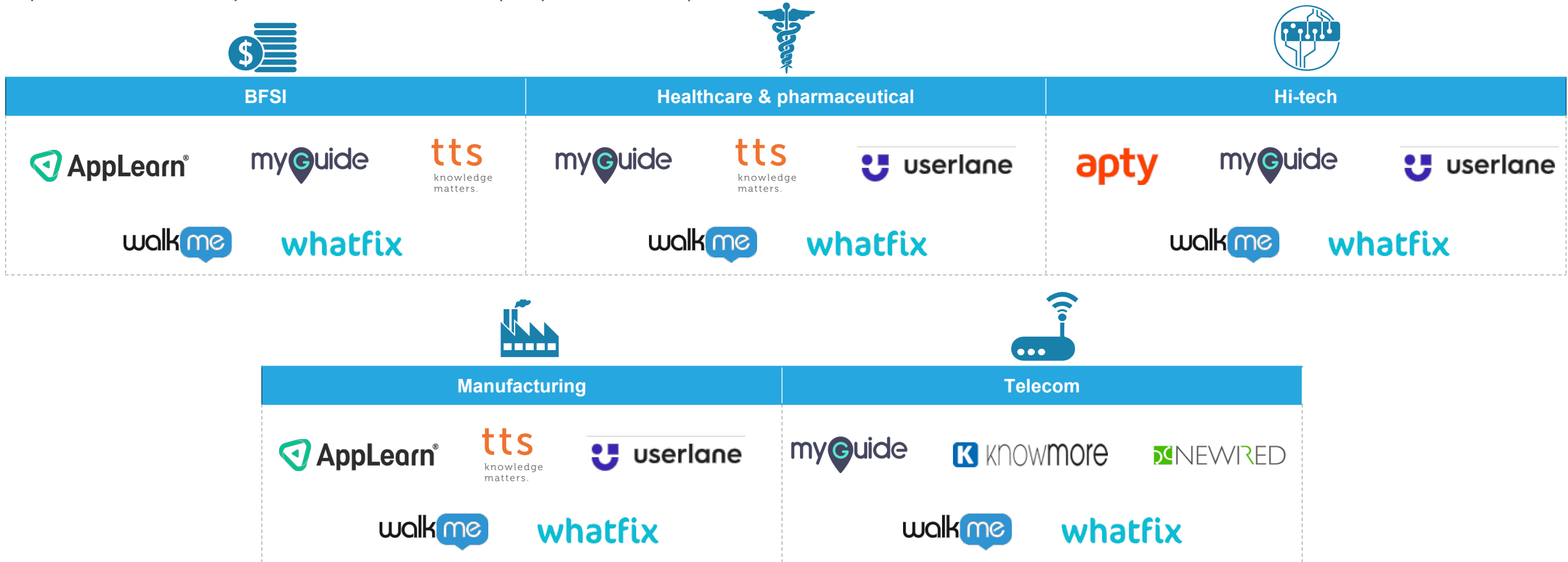
Vendors' DAP market share by number of DAP clients; 2020
(Vendors are listed in alphabetical order within each category)



Note: Market share is calculated based on the overall market size and considers revenues of other vendors including Pendo, Appcues, UserIQ, and GainsightPX.
Source: Everest Group (2021)

WalkMe continues to have the highest market share in the top five industry verticals; Whatfix, MyGuide by EdCast, Userlane, tts GmbH, and AppLearn are the other DAPs with reasonable presence in these industries

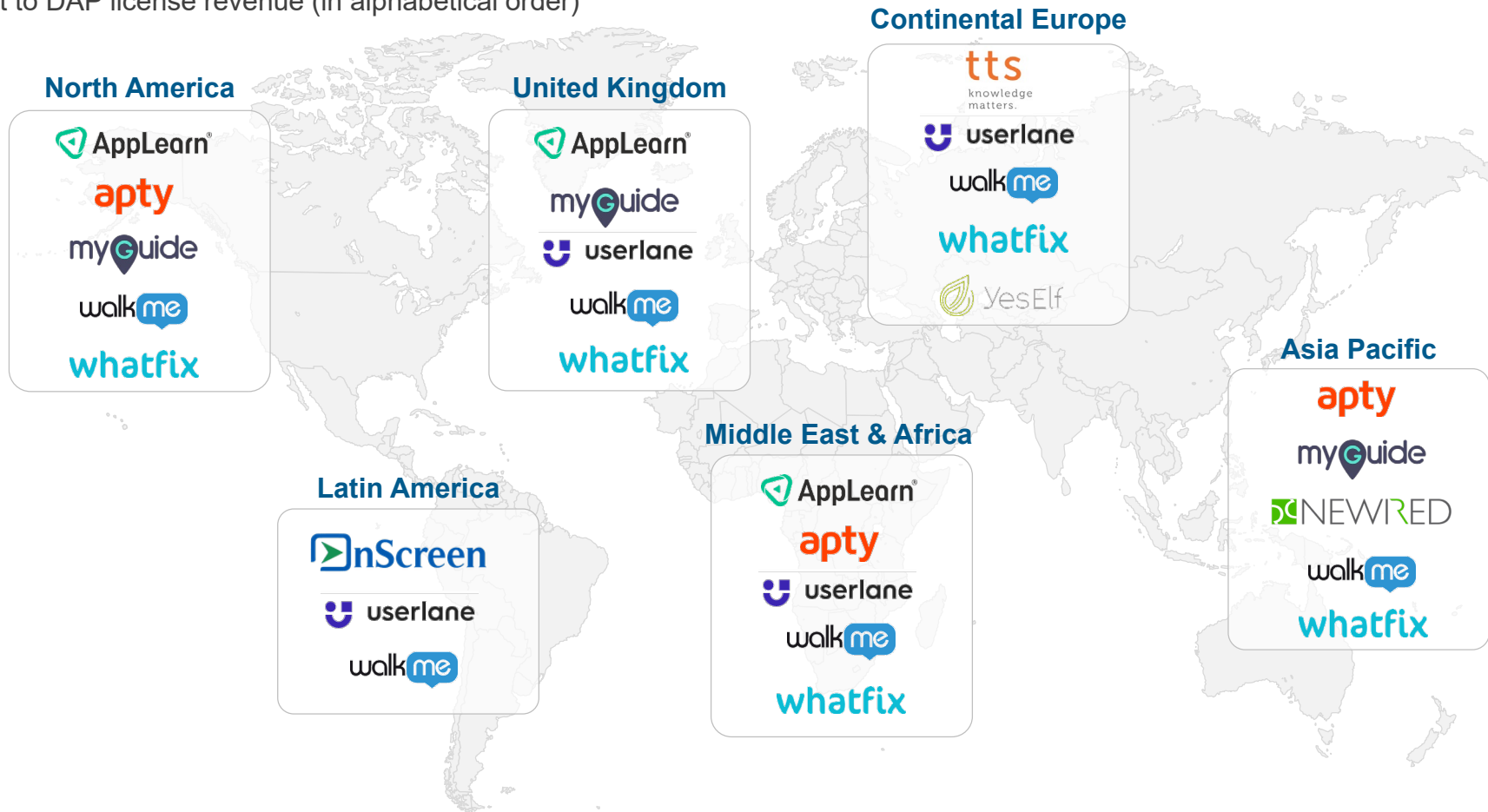
Vendors with the largest share of DAP annual license revenue in the top five industry verticals; 2020
 Top five vendors with respect to DAP license revenue (in alphabetical order)



Source: Everest Group (2021)

WalkMe, Whatfix, and Userlane have a wider geographic reach; other DAP vendors such as AppLearn, Apty, MyGuide by EdCast, and tts GmbH are also prominent in certain geographies

Vendors' share of DAP license revenue in major geographies; 2020
Top vendors with respect to DAP license revenue (in alphabetical order)



Source: Everest Group (2021)

05

Enterprise sourcing considerations

- Leaders
 - WalkMe
 - Whatfix

WalkMe (page 1 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- WalkMe aims to improve user experience, productivity, and process efficiency for employees and customers by accelerating digital transformation efforts. It serves all buyer sizes, including several Fortune 500 companies, and geographies through multiple sites across the US, Europe, Australia, and Japan
- It is the most mature DAP product in the market that supports multi-platform and cross-app use cases. It offers pre-built, templated solutions and has formal partnerships with leading enterprise apps and can integrate with business tools such as communication, data visualization, and Identity Provider (IDP). It has the highest number of services and technology partners that include Deloitte, IBM, Microsoft, and SAP
- WalkMe has one of the most sophisticated analytics capabilities in the DAP space and has heavily invested in it. It developed a robust analytics dashboard to track key metrics pre- and post-go-live. It now provides a consolidated view about system and user activity for C-level executives and deploys goal-based approach to define objectives and success criteria to measure performance of DAP
- It offers Digital Experience Analytics (DXA) insights into a client's journey with WalkMe and captures users' interactions such as clicks, inputs, and submissions. This helps in setting expectations pre-deployment and in identifying user pain points. It also collects mouse position, page snapshots, etc., to create session playbacks and funnels to analyze user journey and frequent drop-off points
- It leverages Machine Learning (ML) to understand forms in the underlying application, recognize fields with the most errors and time spent, and implement guidance to address the inefficiencies



Limitations

- While WalkMe has invested in providing enterprise-level benchmarks (such as time taken to input values, clicks, and errors) for form fields and is planning to further enhance this capability, it currently does not provide industry benchmarks for metrics such as feature usage, guidance accessed, and user retention
- WalkMe is focused on simplifying content creation and maintenance process; however, it does not support the ability to automatically create walkthroughs based on users' interaction with the underlying application
- Even though WalkMe Shield is able to report errors identified to authors, it currently lacks the ability to automatically rectify the issue. This was also mentioned as an area of improvement by buyer references. Referenced clients would also want WalkMe to develop real-time notification capabilities for admins and authors to report errors in guidance being used by end-users

WalkMe (page 2 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- WalkMe will be acquiring Zest, an AI-driven search mechanism to retrieve content from enterprise software and improve self-service support on its centralized desktop widget, “WalkMe Workstation”
- WalkMe allows authors to automate any workflow created, set initiators, and auto play rules. These can also be launched by it on its ActionBot, its conversational chatbot, to automatically execute walkthroughs. This functionality is also available on native mobile-based applications
- “WalkMe Shield” is an automated testing solution to proactively identify any changes in the underlying application. It reports errors that are identified and allows authors to view session playbacks and rectify the issue. “WalkMe Share” facilitates collaboration by allowing content creators to easily share slideshows and videos with others to ease the content approval and management process
- WalkMe has several certifications such as ISO/IEC, SOC 2 type 2 and SOC 3, EU/Swiss-US Privacy Shield, among others and complies with EU-GDPR and US-CCPA laws and regulations
- As part of its Digital Adoption Institute, it aims to deliver vocational training certifications to partners, customers, and the general public. WalkMe has had a significant impact on promoting and spreading awareness about career prospects for DAP professionals/designers
- Referenced clients appreciated WalkMe’s platform-agnostic offering, low-code ability, flexibility and customizations, and automation and chatbot capabilities

Limitations

- While most of the buyers lauded its analytics platform and ability to understand user behavior and optimize support provided, some of the buyers expect the consolidated view for senior stakeholders to be more insightful in terms of data and key metrics represented
- Clients have expressed concerns around the need for better planning deployment and implementation of WalkMe to allow sufficient time to enterprises to prepare
- Referenced clients expect customer success managers to continue investing in improving their domain knowledge to add more value as a strategic partner in the client’s DAP journey

Whatfix (page 1 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Whatfix’s strategy is focused on becoming a software assistant platform to enhance employee experience, maximize enterprise productivity, and improve business outcomes of its clients by making it easy for users to adopt technology. It serves all buyer sizes, including several large-sized companies, multiple geographies, and all the major industries
- The company has a strong partnership ecosystem that includes SIs such as Accenture and TCS, ISVs such as Microsoft, Icertis, SAP, and Oracle to incorporate Whatfix into their solutions
- Whatfix has also established partnerships with technology, analytics, or AI vendors such as Heap, Tableau, Amplitude, and Mixpanel that help in technology integration
- It is one of the few providers that now supports walkthroughs on desktop applications including Microsoft and SAP, and also supports a variety of mobile applications that are built on technologies such as iOS, Android, ReactNative, and Xamarin
- It offers flexible deployment options and can support implementation on both, on-premise and SaaS models. It can block out sensitive information (using editor), follows strict data privacy policies, and has ISO, CSA Star, and SOC2 Type2 certifications to protect customer sensitive information
- Over the last year, Whatfix has invested in its "behavioral analytics" capabilities. This enables enterprises to track application utilization and recognize the drop offs, before or without creating any DAP content



Limitations

- Although Whatfix has made significant improvement in analytics, there is still scope to provide more advanced analytics. For example, it currently cannot recommend walkthroughs based on user confusion
- It only provides need-based customized consolidated dashboard to compare the multi-app usage and adoption across the enterprise. Off-the-shelf dashboards displaying the same are not available
- While Whatfix provides deep analytics for tracking user and application behavior, it currently does not offer industry benchmarks off-the-shelf, which compares metrics such as click rate, feature usage, and user retention among companies within same or different industries
- While it currently offers many automation capabilities, it does not have the ability to analyze the different process variations and identify potential automation opportunities using ML and process discovery capabilities

Whatfix (page 2 of 2)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Whatfix offers four types of professional DAP certifications including DAP Foundation, Content Specialist, Solution Expert, and Adoption Manager for content creators, administrators, and managers
- Whatfix offers personalized recommendation of top content based on “user-similarity score”, which considers various factors such as pattern of application usage and support requirements
- It provides automatic content testing and reporting for content creators to proactively track, report, and rectify any error ahead of releasing guide(s). Testing would provide information of changes in the application that would enable the content creators to update the guides at a faster rate
- Whatfix offers content lifecycle management that enables content creators to maintain content versions so that they can revert to any older version at any time
- It provides enhanced user experience through its “Flow-on-Standby” mode which ensures uninterrupted guidance even if a guide breaks. A pop-up is triggered with a screenshot of the broken step that users can refer to and use to complete the step
- It provides content aggregation capabilities that helps end-users to search and find content across enterprise knowledge repositories without having to leave the application
- Referenced clients appreciated its overall ease of use and lauded its customer centricity and support

Limitations

- Although Whatfix has a strong focus on partner and customer training, currently, it provides trainings in only three languages – English, German, and French. Buyers looking to provide training for content creators / administrators in other languages need to evaluate its capabilities accordingly
- Trainings are provided by Whatfix’s learning and training team for customers and partners. Expanding its training partner ecosystem and additionally providing trainings in multiple languages could offer Whatfix better flexibility to train enterprises in various geographies
- Currently, Whatfix does not offer drag and drop option in creator mode. However, this functionality is a part of its future roadmap
- The creator mode does not have full in-place editor to edit/modify content and balloon options next to the element itself in an intuitive way while in the flow of creation
- Some of the referenced clients expect Whatfix to offer target deployment (deploy parts of the content post modifications rather than redeploying everything), more customizations, nudges when a user leaves a walkthrough, and more reporting/analytics capabilities

05

Enterprise sourcing considerations

- Major Contenders

- AppLearn
- AppNavi
- Apty
- Helppier
- Knowmore
- MyGuide by EdCast
- Newired
- OnScreen
- tts GmbH
- Userlane
- YesElf
- Ziplyne

AppLearn (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- AppLearn aims to make software adoption efficient for business processes and improve employee experience through a user-centric approach. Its value proposition is to measure user behavior and application effectiveness through analytics and offer platform-agnostic step-by-step guidance
- AppLearn serves clients across multiple geographies, buyer sizes, and industries. It has the capability to deploy its platform on multiple applications and primarily focuses on supporting digital adoption for employee-facing applications
- It leverages its partnership with ServiceNow to deliver knowledge into a user’s natural flow of work. It allows users to refer to materials while continuing the task at hand by automatically syncing content to Adopt Content Cloud, so that content can be served through its contextualized split screen. AppLearn is investing in creating integrations with other content repositories
- AppLearn’s key strengths are its core and advanced analytics modules, which facilitate the measurement of adoption and performance against business KPIs and outputs. These provide the ability to map user journeys in processes and provide details about workflow design. By highlighting workflow bottlenecks, stakeholders can redefine workflows that meet user needs and improve user experience
- It now offers users an OKR dashboard as a part of its advanced analytics module where enterprises can track and see the different business level KPIs in a single window

Limitations

- AppLearn is focused on employee-facing use cases and its ability to support enterprises looking to adopt a DAP for customer-facing use cases is relatively untested
- Although AppLearn fully supports mobile responsive and web- and desktop Progressive Web Application (PWA)-based applications; however, its desktop- and mobile-native ability is currently limited to Microsoft Teams application
- It currently does not offer any automation capabilities such as ability to automatically execute repetitive tasks within the underlying application and reducing the number of clicks by the users
- Although customers have the option for their tenant to be hosted in the US or EU, depending on preference or regulations, enterprises with data regulation constraints may find AppLearn’s offering to be less attractive as it does not support on-premise and private cloud-hosting models
- AppLearn currently does not have the ability to convert workflows into different formats such as videos, PDFs, and slideshows

AppLearn (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- It has introduced “discovery mode” in its analytics offerings which delivers application-wide insight into how users are interacting with all their business applications supported by the same universal extension
- It has added “experience mining” feature as a new experience overview dashboard with trend analysis, that allows stakeholders to quickly identify problem areas and drill into individual tasks. The detailed task performance view with task profiling allows stakeholders to identify the major causes of poor experience within applications, using multiple criteria such as language, location, and other business attributes
- In addition to walkthroughs, it also offers checklists for tasks, data validation, contextual help for users, tooltips, and in-app messages / pop-ups. Its Adopt technology is platform agnostic and supports various systems such as ERPs, HCMs, and CRMs without the need to deploy custom code. AppLearn allows the solutions to span multiple applications and guides users end-to-end wherein the same walkthrough can jump across more than one application
- AppLearn provides a value added “Hypercare” offering to ensure that customers get as much support as they need from its professional services team, until they are ready to take ownership of Adopt themselves
- Referenced clients have appreciated the analytics, user interface, customer support, as well as the steady improvement and expansion of functionalities AppLearn is incorporating in its DAP

Limitations

- Enterprises might face some difficulty during product upgrades as a built-in version control is currently not available, but this feature is under development
- AppLearn provides only online training programs. It does not provide classroom training programs to content creators. The sessions conducted are only for learning purposes and no certification is offered after any program completion. However, it is investing in launching certification programs
- Currently, content creators need some basic coding skills to edit and rearrange steps in the walkthroughs since a fully functional drag and drop feature is currently in development
- Buyers would like AppLearn to support a wider range of native-mobile applications along with ease of DAP deployment/implementation
- Referenced clients underscored content management and the ability to edit/remove unpublished walkthroughs as an area of improvement

AppNavi (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- AppNavi’s product vision is focused on enhancing the onboarding experience for users and helping them interact with new software and applications effectively and efficiently. It has been making continuous investments toward adding capabilities such as analytics, automation, and process mining
- The company partners with several Value-Added Resellers (VARs) network to support its clients with their pre- and post-implementation needs and has been making consistent efforts to build a direct sales channel
- While its strategy remains focused on employee-facing applications, it has made reasonable strides to expand its usage to customer-facing software during the last year
- The product offers in-app guidance through walkthroughs, tooltips, and pop-ups across multiple applications, which can also be deployed for visually impaired users with the help of screen readers and is based on the Web Content Accessibility Guidelines (WCAG) standard
- Through its recent investments, AppNavi can now identify processes that can be automated to reduce empty clicks and offers capability for automatic execution of walkthroughs, pausing only when manual intervention is needed
- The company’s strengths also include the ease of content creation for authors. It provides in-place step editing and testing capability, along with a step recorder that can detect selected elements across multiple applications as part of the same process flow

Limitations

- Headquartered in Germany, most of its clients are based in Continental Europe and, hence, its experience in serving clients in other regions such as North America, the UK, and Asia Pacific is limited vis-à-vis its peers
- Buyers looking to implement DAP for a mobile- or desktop-based application may not find AppNavi’s current capabilities to be suitable
- Though AppNavi has added analytics capabilities, enterprises seeking a DAP with features such as tracking metrics of the underlying application, usage comparison across multiple applications on the same dashboard, and providing industry benchmarks for metrics may need to analyze its ability carefully
- Currently, the product does not provide a survey feature in-house, which may be a limitation to enterprises that do not have an existing survey tool

AppNavi (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- AppNavi allows authors and administrators to create user segmentation for targeting in-app guidance for specific users and branched walkthroughs for conditional triggering. The product is multi-lingual and supports 25+ languages within the product itself via integration with third-party language translation tools
- The content management process is simplified by leveraging analytics for administrators to report issues within a walkthrough and can send automatic alerts/emails to authors to rectify such error. Additionally, it also offers built-in version control library for the content created
- AppNavi’s architecture allows for multi-tenancy deployments and smooth operation of the underlying application. Its emphasis on data privacy and security ensures that it is non-invasive and prevents it from storing any personal data of the user
- It supports on-premise and private and public cloud hosting models and can also be deployed as a code snippet within the underlying application. For web-based applications, the product is offered as a web extension that supports browsers such Google Chrome, Internet Explorer, and Microsoft Edge
- One of the key differentiators for AppNavi is the flexible commercial models offered to the clients – based on the number of users, usage-based charging per interaction, and flat price based on predefined parameters
- Referenced buyers lauded the ease-of-use of the platform, automation capability, and ability to handle complexities such as integrations, segmentation rules, and data validations

Limitations

- The training is self-offered by AppNavi via online mode and is available only in German and English, which may be a drawback for some clients
- The product currently supports conversion of in-app guidance content to PDF format only for auditing and quality management purposes and does not offer this functionality for end-users in formats such as PDF, images, videos, or text files
- Client references mentioned in-depth analytics capabilities, conversion of content to other formats, and content management as its areas of improvement
- Buyers also expect AppNavi to build a community/forum for all customers to interact with each other and engage in discussions about challenges and best practices

Apty (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Apty’s vision is geared toward measuring usage adoption rate of the underlying application regularly to implement on-demand support and guidance on web- and mobile-based applications, thus improving the overall product utilization. The company’s data-centric approach allows enterprises to understand adoption challenges across applications and process workflows
- The company continues to invest in expanding its formal partnerships with service partners for implementation, system integrations, and support and VARs for reselling Apty licenses to clients
- Its offerings include “Apty Assist” and “Apty Align”, which help enterprises train and onboard employees using features such as walkthroughs, checklists, tooltips, announcements, help widget, and data validation across multiple applications. The content can be customized based on users’ role, team, or location
- Apty has invested in making its walkthroughs more robust by focusing on strengthening its guidance through feature additions to its element detection/selection (such as shadow DOM, CSS, and XPath selectors). It allows translation of content created within walkthroughs, tooltips, and announcements to multiple languages and is investing in automatic translation capabilities using Google API
- Leveraging its data collection and advanced analytics capabilities, “Apty Adapt” recognizes user pain points without deploying walkthroughs to optimize guidance provided. It allows admins to set goals, assign target values and set timelines, and manage progress of OKRs. The administrators can also send alerts to relevant user segments, in case of a risk of failing associated with the goals

Limitations

- While Apty has a well-balance portfolio in terms of buyer size, it is highly skewed toward buyers in North America, it has less presence across Continental Europe, Asia Pacific, and Middle East & Africa. It also lacks experience in the UK and Latin America
- The majority of its clients have deployed the product on one application and its experience in serving clients deploying DAP on more applications is limited vis-à-vis its peers
- Apty has capabilities to support applications across web and mobile; however, its abilities for desktop-based applications are relatively low. Currently, it can only be deployed on HTML-based and client-owned desktop-based applications
- Currently, the product only offers need-based customized consolidated dashboard to compare analytics across multiple applications. Off-the-shelf dashboards displaying the same are not available, which may be a limitation for some clients
- Apty has not yet developed the capability to roll out surveys to collect user feedback within its application; however, it is currently under development
- While Apty offers remote maintenance and 24/7 product support, there is no product help tool for administrator and content creators

Apty (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Apty regularly tracks usage statistics such as guide completion rates, error rates and instances, time consumed, and users’ interactions to recognize frequent drop-off points and highlight friction areas for the users. These can be measured against goals set and industry benchmarks
- Apty can accelerate processes to reduce manual effort required from the users. The “Apty Automation” tool launches a conversational bot programmed to make API calls to hosting application upon predefined triggers set by administrators
- It provides a single desktop application “Apty Studio” that can be used to create content for both web- and desktop-based applications, and is available in four languages – English, German, French, and Spanish
- It is Sharable Content Object Reference Model (SCORM) compliant and can integrate with knowledge bases to display relevant content. The content can be converted into formats such as PDFs and videos
- Apty follows strict data privacy policies and has ISO and SOC2 certifications to protect customer sensitive information. The data and privacy controls can be assigned based on different roles
- It can be deployed and hosted on-premise and private and public cloud when offered as a SaaS-based platform. It also supports customers seeking a combination of different hosting models
- Buyer references quoted Apty’s functionality and features, User Interface (UI), ease of use, price point, and customer relationship management as its strengths











Limitations

- Currently, Apty offers training for administrators and content creators in three languages – English, Russian, and Spanish – which may be a deterrent for clients seeking training for a more globally diverse workforce. It also does not provide any certification programs for content creators or administrators
- Though Apty offers on-demand training for administrators and content creators, it is primarily offered in-house, which may be a deterrent for clients that work with training partners
- Apty is yet to offer a built-in version control for the content created as well as the product itself
- The company does not offer diverse commercial model options for its clients, which may be a limitation when compared to its competitors
- Although the referenced clients appreciated the branding options offered as part of the administrator and content creator controls, they emphasized the need for different workflow environment based on users, more robust branching options, greater flexibility for visual formatting, and certification programs

Helpier (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Helpier’s aim is to improve the user experience through in-app guidance and self-service functionalities. Its walkthroughs or “product tours”, dynamic tooltips, and pop-ups can be used for use cases such as improving user onboarding and training as well as reducing product marketing efforts and support costs
- The company’s strategy has been focused on building a strong partnership ecosystem to expand its reach. Currently, Helpier is leveraging PartnerStack to manage its partner program and is listed as an add-on tool on Adobe’s Technology Partner Program
- Using the step recorder and in-place editing capability, and a plethora of pre-built, customizable templates, authors can create interactive tours and tooltips across multiple pages and web-based applications. These can be segmented to target a specific audience and triggered based on the user’s interaction with an element or URL
- The product also offers “banners” to showcase relevant offers and resources to end-users, “warnings” to inform users about server updates and possible system errors, and NPS surveys to collect user feedback. In addition, it allows administrators / content creators to maintain a centralized and personalized knowledge management platform to boost employee collaboration and productivity
- The content created can be converted to the different languages, either manually by the author or automatically via integration with translation tools such as Microsoft Translator. The admin can manually configure language preference based on user’s location or allow Helpier to detect the browser language

Limitations

- The majority of Helpier’s clients are based in Continental Europe, hence, its experience of serving clients in other regions, such as North America, the UK, and Asia Pacific, is limited vis-à-vis its peers
- While Helpier has features to support both internal- and external-facing use cases, most of its clients are deploying the product for external-facing application. Its ability to serve the enterprises’ internal-facing use cases focused on employees, is relatively untested
- Currently, Helpier has the ability to support walkthroughs for only browser-based and mobile responsive browser applications. It does not offer the ability to create walkthroughs for native mobile and desktop applications
- The overall guidance functionality is sophisticated and can support cross-application functionality as well; however, it currently does not offer branching of walkthroughs
- Although it has pre-filling capability for form fields, it does not provide data validation functionality for user inputs

Helpier (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Helpier tracks key metrics such as walkthroughs played and completed, completion rate for each walkthrough played, and users that played the tour, relevant to understand user behavior and track performance of the guidance deployed. It also offers analytics for NPS surveys and feedback
- It supports integration with advanced analytics tools such as Google Analytics and Mixpanel for clients to dive deeper into the data collected. Other integrations include designing tools (Canva), calendars and forms (HubSpot, Mailchimp, Calendly, and Typeform), Bubble and Electron JS application builders, and Microsoft SharePoint, along with Helpier API
- Helpier offers flexible deployment options such as on-premise, cloud-based, and SaaS platforms for browser-based applications
- It supports various browsers such as Google Chrome, Microsoft Edge, and Mozilla Firefox. The product is available as a browser extension or can be enabled by inserting the code snippet into the website
- It provides implementation services that include content creation and maintenance, online and virtual training, and customization support. The product has an in-built help center for content creators and administrators
- Its data is stored in the EU and is protected by GDPR laws. Any user-related data store is anonymized, and sensitive data is encrypted to ensure data privacy











Limitations

- Though Helpier has basic analytics and automation features, enterprises seeking advanced capabilities such as OKR-based analytics and automated execution of walkthroughs should analyze its abilities carefully
- Currently, it can detect and track fail behavior in the content created and warn users and authors in advance; however, it does not have the ability to automatically test or schedule testing of walkthroughs or tooltips
- Helpier allows exporting walkthroughs to video/MP4 format but lacks the ability to convert them into other formats such as PDFs or slideshows
- Though Helpier provides online and offline training programs to its clients, the training is only implemented by its training team
- The company currently offers training for administrators and content creators in English and Portuguese, which may be a deterrent to enterprises having a globally distributed workforce

Knowmore (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Knowmore’s strategy is focused on offering training and on-demand support to users to help ease the burden of digital transformation for their clients. It provides a virtual learning experience with its K-Studio solution and in-application guidance via K-Now
- K-Now offers automatically contextualized content such as walkthroughs and documentation based on the user’s webpage location as part of the help widget. In addition, it also leverages dynamic tooltips for educating users just-in-time
- In addition to the walkthroughs, K-Now also offers other key features such as data validation, announcements, and pop-ups, which can be coupled with conditional triggers aiming to improve user adoption
- In 2020, Knowmore launched a stand-alone analytics solution – K-Value – as part of its suite to allow enterprises to track key metrics such as time spent, frequency of use, and adoption rate for multiple applications without deploying walkthroughs and other guidance elements. It can also be used as an add-on to K-Now
- The creator mode allows the author to create branched and segmented workflows, embed video or image within bubbles, build and design surveys to collect user feedback at the end of guidance, and manage the language translation process

Limitations

- Knowmore predominantly serves the Continental Europe markets, though it is exploring opportunities in other key geographies such as the North America
- While the company is exploring opportunities and has some customers deploying DAP on external-/customer-facing applications, its major focus remains on the internal-facing use case
- K-Now currently supports walkthroughs only on browser-based applications and is investing in developing DAP for mobile-based applications. However, it does not support desktop-based applications
- Even though Knowmore has investment plans to utilize next-generation technologies such as automation and AI, it currently does not offer use cases employing these, such as recommending walkthroughs, in-house chatbots, or automated workflows
- Currently, the content in guidance cannot be automatically converted to different languages. However, the product offers the walkthrough creators the ability to manually translate the created content to different languages

Knowmore (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- K-Now offers adoption statistics about all published content for an application and walkthroughs launched and completed. Knowmore also provides administrators a single platform for publishing and managing all workflows created for multiple applications
- The DAP product supports the ability to integrate with existing enterprise chatbot to launch relevant guidance using shared permalink. It can be also integrated with enterprises' knowledge bases and Learning Management Systems (LMS) and to launch content within the DAP platform
- It offers a set of pre-built content for major enterprise applications such as CRMs and HCMs, for quicker deployment. Additionally, the company also provides professional services such as walkthrough creation and deployment support, consulting, and specific configurations and integrations
- K-Now can be deployed on-premise or private and public cloud as a SaaS platform to provide in-app guidance for browser-based applications. It supports various browsers such as Google Chrome, Microsoft Edge, Internet Explore 11, and Mozilla Firefox
- Knowmore has a partner ecosystem for sales, implementation and deployment, and training and support. The company is also focusing on adding more VARs, SIs, ISVs, and training partners to better serve its clients
- Referenced buyers highlighted ease of deployment, flexibility and level of customizations, customer support, and cost-effectiveness of the product as its key strengths



Limitations

- While K-Value can provide rich insights into the data collected and consolidated view of metrics measured pre-go-live and prior to deploying walkthroughs, these insights and metrics are not available in K-Now. Enterprises will have to opt for K-Value as an add-on service for these advanced analytics
- Knowmore also does not provide industry benchmarks for different metrics such as feature adoption, NPS, or completion rates against other similar products or enterprises
- Currently, Knowmore has the ability to export data to feed in advanced analytics tools such as Qualtrics; however, it does not have the ability to create custom reports in-house
- Knowmore offers classroom training for content creators and administrators in-house in English and French. This may be a deterrent for enterprises preferring other European languages such as Portuguese, Spanish, and German
- Although Knowmore has plans to expand its formal partnerships, it currently does not have any technology partners in the areas of analytics, AI, and other integration vendors, to improve its DAP offering
- Referenced clients mentioned the need to improve user interface design and accessibility for both end-user as well as administrator / content creator and editor mode controls

MyGuide by EdCast (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- MyGuide aims to address the problems faced by enterprises during their digital transformation journey by providing them a unified technology, process, and people adoption platform. It offers different functionalities under six major buckets – tour, guide, assist, course, chat, and cue. Its product development strategy is primarily focused on three key areas – guidance, insights, and automation
- The company has heavily invested in developing computer vision capability to offer robust element detection for desktop-based applications, in addition to web- and mobile-based apps
- MyGuide also offers contextual help using tooltips, checklists, help widget, form validation, language translation to about 40 languages using Microsoft APIs, surveys, banners for announcements, and beacons. It supports cross-application functionality wherein the same walkthrough can jump across more than one application
- Users can leverage MyGuide’s advanced capabilities such as automation for reducing the number of clicks, automatic navigation, and executing repetitive tasks. It offers integrated chatbot for self-service and advanced search, which helps users find the guide by entering/speaking the keyword related to the workflow
- MyGuide offers bots for automatic scheduling of routine guide testing to reduce manual effort for administrators. These tests help make guides robust by providing detailed reports of guide completion or discrepancies that may require further analysis or correction

Limitations

- Its operations in Continental Europe, Latin America, and Middle East & Africa may not be as mature as their market presence in some countries in North America and Asia Pacific and, hence, its experience in serving clients in these regions is limited vis-à-vis its peers
- MyGuide predominantly serves enterprises for their employee-facing use cases and its ability to support companies that are looking to leverage walkthroughs for customer-facing applications is relatively untested
- Enterprises might face some issues if they plan to frequently update content as it is yet to offer a built-in version control for the content created
- MyGuide does not offer the ability to benchmark different metrics such as feature adoption, NPS, or completion rates against other similar products or enterprises
- Though it helps admins and content creators in learning basic configuration and advanced topics through its support portal, it does not offer an embedded product help tool for them

MyGuide by EdCast (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- The product offers ability to generate SCORM compliant material and in-app guidance content can be downloaded in seven different media formats (plain text, video, PPT, PDF, Document, HTML, GIF) that are automatically generated and kept in sync
- Walkthroughs that support conditional branching can be created to ensure that users have access to content most relevant to their page interactions and can target content to specific users through segmentation
- MyGuide’s in-built publishing workflow allows for segregation of duties via different users/roles assigned for creation, review, and publishing rights
- The product’s analytics capabilities allow track guide usage- and user-related data with step-wise breakdown to identify user drop-off points, as well as completion rates, views, search keywords, and time spent on a particular step and walkthrough
- The product has its own Learning Knowledge Cloud (LKC) platform that can be integrated with MyGuide. LKC helps in training and certifying the users, partners, employees, support staff, and resellers. It also has a MyGuide University, which is the training center for all MyGuide’s offerings
- Referenced clients highlighted the customer support, flexibility to create and export content, and user-friendliness of the platform as MyGuide’s key strengths




Limitations

- Although MyGuide has some analytics capabilities with respect to understanding user searches for help/guides and knowledge consumption analytics, there is scope to provide more advanced analytics before deploying walkthroughs. For example, it currently does not provide user behavior data based on clicks and error rates
- It does not have the ability to identify instances where user is confused and unable to proceed with the desired process. Currently, it also cannot recommend/suggest walkthroughs to users based on the events that led to the confusion or error
- Referenced clients highlighted that there are improvement opportunities in the creator mode in terms of adding more filter options to organize content better and making the creator mode easier to understand for new content creators from non-technical backgrounds
- Referenced buyers also want to see more metrics being tracked in the analytics module such as time stamp for total time spent on using a guide and user click rates on a hyperlink/video in a walkthrough
- Referenced clients feel that the guides need to be more robust and expect MyGuide to provide complete implementation support

Newired (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Newired’s aim is to deliver the value of a digital transformation investment made by enterprises with the help of on-screen guidance and support for both external- and internal-facing applications
- It continues to build partnerships for reselling and implementing DAP for its clients and training partners for onboarding administrators and content creators. Its strong network of Original Equipment Manufacturers (OEMs) helps product companies to offer their own application and Newired as a bundled package to their clients
- Newired investment plans are geared toward enhancing the robustness of the product in terms of multi-tenancy and plug-in architecture, content binding for customers’ apps for precise element detection and stable user experience, and automated security testing to ensure compliancy with security standards
- The product’s flow recorder enables walkthrough authors to execute workflow in real time and automatically captures elements and interactions. Its ability to edit content in-place and leverage libraries for rich media content enhances author experience and increases speed of content creation
- Newired “editor” for content creation and management is a stand-alone desktop application that is not dependent on browsers. It allows authors to create cross-apps and branched walkthroughs, dynamic tooltips, set rules for conditional triggering, data validation, and content language and embed surveys to assess improvements for the guidance deployed and the underlying application
- Newired is version aware and focused on developing a robust review/publish process for administrators. All published content is presented as a slideshow for previewing and signing to maintain functional safety

Limitations

- Newired has a vast experience in serving clients in Continental Europe and North America; however, it has limited presence in other geographies such as the UK and Asia Pacific
- While Newired has deployed the product on desktop-based applications for some clients, it experience is rather limited vis-à-vis its peers
- Although it supports mobile-responsive applications, it has not yet developed capabilities to offer in-app guidance for native mobile applications
- Currently, Newired does not track metrics relevant to the underlying application such as new feature adoption, which may be a deterrent to clients seeking DAP for customer-facing use cases
- While walkthroughs can be deployed across multiple applications; however, it does not provide the ability to compare usage analytics across these applications on the same dashboard. It also does not have the capability to offer industry benchmarking

Newired (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- The product can integrate with existing knowledge base to embed relevant content as part of Newired for on-demand support to the user. It also supports open API for integration with other enterprise applications
- It tracks key metrics such as completed processes and time spent for administrators to understand engagement and usage trends. It also helps identify confusion instances and rate of drop-off for each step
- It is non-intrusive and maintains data anonymity for any data collected for reporting and analysis purposes. Newired is also investing in enhancing its security capabilities to enable customers to create DAP content with strict Content Security Policy (CSP) rules
- It provides online and offline training in multiple languages for client content creators and administrators. Additionally, it also offers a formal certification program for individuals to certify as a DAP professional
- Newired’s commercial model is based on the number of end-users, inclusive of set-up and training costs. It also offers custom plans for large enterprises and OEM licenses for ISVs
- The product can be deployed on-premise – on private server and cloud, on public cloud, or on hybrid cloud. It is compatible with browsers such as IE (9, 10, and 11), Microsoft Edge, Mozilla Firefox, Google Chrome, Safari, and Opera, with the editor available as a desktop application
- Referenced buyers highlighted ease of use for end-user and content creator, simplicity, flexible deployment, and proactiveness as Newired’s key strengths











Limitations

- Though Newired has the ability to automatically trigger journeys, it has not yet developed advanced capabilities such as API-based automation and chatbots. However, it has development plans around this capability
- While the product’s feature set includes walkthroughs, tooltips, and surveys, it currently does not support the checklist feature, a set of tasks the user must complete for a successful onboarding. However, it is currently investing in developing these capabilities
- Buyers mentioned greater flexibility in terms of customization and branding options for the content creator, enhanced capabilities for desktop-based applications, and intuitiveness of the product as some of the areas of improvement for Newired

OnScreen (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- OnScreen’s vision is geared at increasing the success rate of digital transformation projects by improving users’ time to proficiency and reducing training development and support time. It is primarily focused on SAP systems and is SAP certified but has pre-built templates for other enterprise web applications such as Salesforce, Ariba, Workday, Oracle, and ServiceNow
- Within the few years that it has been active in the market, the company has been able to form some partnerships with VARs, technology vendors, and training and implementation partners. It plans to invest in developing partnerships with more mature vendors to better serve its large-sized, global clients
- Headquartered in the US, OnScreen has some experience in serving clients in North America and is expanding to other key geographies such as Continental Europe and Latin America
- The product supports walkthroughs on browser- and desktop-based applications and can offer cross-application support. It has also invested in desktop-based application capabilities and offers on-demand support resources, announcements, and auto-redirection
- It provides user segmentation based on visibility rules and tagging, ability to embed video within the walkthrough, created branched walkthroughs, insert custom code, and offers walkthrough creators the ability to convert the language of the content created. The walkthroughs created can also be exported to formats such as PDF and Word document











Limitations

- OnScreen is primarily focused on serving the employee-facing use cases and its ability to provide in-app guidance capabilities for customer-facing applications is relatively untested
- Currently, it can support in-app guidance on mobile responsive, web-based, and SAP desktop applications. It does not support native mobile applications and other desktop-based applications
- Even though OnScreen allows automatic advancing of guidance steps, it does not have advanced automation capabilities. However, it plans to invest in next generation capabilities such as process mining, predictive analytics, and automation in the long run
- While OnScreen provides a consolidated view of guidance adoption, the level of insight and data tracked is limited. There is a scope of improvement in terms of tracking drop-off points, process funnels, comparison of usage behavior across multiple enterprise applications on the same dashboard, and ability to provide industry benchmarks for different metrics
- The product currently does not provide the functionality to validate user input on the basis of the data entered or the conformance of the value entered with the format for the specific field

OnScreen (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- OnScreen allows content creators to record all the steps and elements interacted within a process in one go to create walkthroughs. Once the recording is complete, authors can customize the content of the bubbles and update its aesthetics. With this capability, enterprises can reduce the time to create additional content
- The product’s analytics offer decision makers and administrators the ability to view the most-used guides, average completion rate per user, and a list of inactive users and unused guides. It also offers the ability to download the data collected in a spreadsheet format
- OnScreen offers professional services such as business process discovery and mapping, walkthrough creation, maintenance and translation services, project management, and training. Furthermore, it helps its clients build DAP CoE as part of its customer success model to build and scale DAP adoption
- It offers online training in multiple languages in-house or through partners to content creators and administrators. It also has a certification program for those who have completed the training
- Currently, the product is offered as a browser extension for web-based applications and is available on major browsers such as Google Chrome, Microsoft Edge, and Mozilla Firefox. The product leverages Microsoft Azure’s cloud security to protect user-related data and is GDPR compliant
- Referenced clients have indicated high overall satisfaction, especially with the product’s ease of use and deployment, customer support and application expertise, and proactiveness











Limitations

- Currently, the product does not offer authors the ability to convert the existing content to other languages automatically. This is achieved by manually converting the content to the required languages
- While the content creators can include the documentation link within the walkthrough, it does not support integration with LMS or knowledge base to display relevant content in the bubble
- OnScreen’s feature set does not support the checklist feature, a set of tasks the user must complete for a successful onboarding, and surveys to collect user feedback
- Currently, OnScreen can be deployed as a cloud-based, SaaS offering and does not support on-premise as a deployment option
- The client references would appreciate if OnScreen would provide more customization options and enhance its language translation functionalities, along with improving its implementation services in terms of timeline

tts GmbH (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- tts GmbH aims to offer a holistic digital adoption solution to users which spans simultaneously along the lines of learning and guidance. It offers tts performance suite with “five moment of need” support which helps enterprises create digital content to support the employees and provide them guidance to be more productive when they use the tools for executing business processes
- Its market presence is in Continental Europe – especially Germany. It has invested significantly in its partnership ecosystem and is expanding in other major geographies. It has a proven expertise of working with large clients (more than 10,000 employees)
- tts performance suite can be deployed as a desktop widget that provides users one recognizable access point through its "Orange" icon. This software analyzes user location within the application and shows contextual help in the form of side-by-side guidance. Additionally, it now offers the announcement feature to its customers to send push notifications to the user's desktop
- It has a content management system portal where either content can be created and curated or enterprise LMS content can be linked with the portal. Users can directly access various types of content such as self-learning units, concepts and processes, and e-learning courses)
- It offers different types of product lines for enterprises depending on their different content creation needs – for high end / heavy content creation and lite or quick content creation









Limitations

- Though it has major presence in Continental Europe and some presence in other regions such as North America and the UK, tts GmbH has limited presence in Asia Pacific vis-à-vis its peers
- While it supports mobile responsive, web-, and desktop-based applications, it currently cannot support native mobile/tablet applications
- Tts GmbH predominantly serves enterprises for their employee-facing use cases and its ability to support companies that are looking to leverage walkthroughs for customer-facing applications is relatively untested
- Although tts performance suite has some analytics capabilities with respect to understanding user searches for help/guides and knowledge consumption analytics and can provide consolidated dashboards to compare usage of different applications, there is scope to provide more advanced analytics before deploying walkthroughs. For example, it currently does not provide user behavior data based on clicks, user drop-off points, and error rates
- While the product collects some content feedback from users through a five-level rating scale, it does not offer the ability to create general surveys, gather and generate dashboards and reports on metrics such as NPS, or integrations with third-party surveys

tts GmbH (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- tts performance suite provides different logins for different roles (authors, key users, knowledge manager etc.) and has robust workflow and approval systems. It offers deployment in view only formats to allow knowledge to be organized at course, process, and content level structuring. Courses can be easily created, curated, and exported via SCORM
- It has a step recorder feature in editor mode and a guidance gets recorded in three modes simultaneously – presentation, video, and document. The order of the steps can be changed by drag and drop and it is possible to create versions of existing documents. The product supports language translation by exporting and importing content created as Word files or in XLIFF format for translation
- tts GmbH follows strict data privacy policies, is GDPR compliant, and has ISO and IEC certifications to protect customer sensitive information. The data and privacy controls can be assigned based on different roles
- It is building a digital "tts University" to offer training and standard learning content for any role in customer organizations or in partner organizations. Their customer base can benefit from online and virtual classroom training and receive consistent updates on products and services or best practices
- Buyers have appreciated its context recognition feature, adaptability to changing business scenarios, social learning component, windows integration, and willingness to discuss use cases and roadmap with clients

Limitations

- Clients looking to reduce data entry errors in fields/forms in certain processes should carefully analyze its capabilities to support this use case
- Enterprises might face some difficulty during product upgrades as a built-in version control is not available for the product. However, upgrades of the product are carried out in conjunction with the customer when new releases are available. These upgrades are planned and implemented in such a way as to minimize any impact on users of the software
- tts GmbH provides online training programs through its tts university. However, it does not provide classroom training programs to content creators. The sessions conducted are only for learning purposes and no certification is offered after any program completion
- Buyers would like to have more flexibility, more integrations (such as API to access the info we have created through other tools), ease of use for content creators, and automatic triggers for update reviews

Userlane (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Userlane’s vision is to enable enterprises to enhance software onboarding, training, and support experience for end-users as well as the content creators. It focuses on speed and ease of implementation and deriving maximum ROI from a digital transformation project
- It has a well-balanced client portfolio mix, with customers across multiple geographies (such as North America, the UK and Rest of Europe, Asia Pacific, Latin America, and Middle East & Africa) and buyer sizes. It also has experience in serving both the internal- and external-facing applications
- Userlane continues to build its partner community – network partners for offering Userlane to the partners’ existing customer base, consulting partners for end-to-end implementation, and resellers for expanding its reach. Its current partners include Microsoft, SAP, ORBIS, Sopra Steria, Kainos, Communrado, and Wahler HR, among others
- The product has a step recording functionality that enables walkthrough authors to execute a workflow in real time and create walkthrough with relevant details captured. It also offers an in-place editor to edit/modify content and balloon options next to the element itself, in an intuitive way while in the flow of creation. These walkthroughs can also be exported into PDFs for quick documentation purposes
- Authors can set rules for different “chapters,” a separate environment for a set of guides along with user and page segmentation options. Userlane offers administrators the ability to fully customize the overlay to adapt to the brand of the underlying application or the organization

Limitations

- Userlane can only be deployed for web-based applications, which may be a deterrent for clients seeking multi-platform (mobile, desktop, tablet) guidance and support for the users
- It does not have the ability to create branched walkthroughs for complex workflows; however, it is investing in developing this capability
- Although Userlane integrates with major third-party survey vendors and provides the ability to launch NPS, surveys, and feedback forms, it does not offer an in-house survey tool
- While Userlane has plans to add more features, such as the ability to identify opportunities to deploy guidance and beacons that enhance the content creation and end-user experience, it is yet to focus on developing automation capabilities
- Currently, Userlane lacks the ability to integrate with existing knowledge bases to display relevant content to users

Userlane (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- In addition to walkthroughs, it includes features such as checklists (a task list for end-users), announcements (for push important notifications), and ability to connect with helpdesk and support documentation as part of the help widget
- Userlane has invested heavily in revamping the analytics offered within the product. The dashboard now provides an insight about the performance of guides and other features – usage of guides in terms of unique users and guide started. For senior stakeholders and decision makers, an overview report with completion rate and interactions is included as well
- It also provides a step-wise breakdown to understand exit and error rates. Based on the errors detected and threshold set, the system alerts the author/administrator by sending an email about the error instance and stage
- Userlane offers flexible deployment options and can support implementation on both, on-premise and SaaS models. It also has the option of multi-region hosting for the US and EU regions for customers to comply with international data security standards and is ISO certified to protect customer sensitive data
- It provides professional services such as implementation, content creation, training, and consulting services, along with offering pre-built packages to its clients
- The referenced buyers lauded the product’s depth of functionality, ease of use, and simplicity and highlighted customer support as a key strength

Limitations

- Although Userlane allows administrators to download the data collected for a deeper analyzes using BI tools, it does not have the capability to view usage analytics across multiple applications as part of the same dashboard
- While it plans to further develop its analytics tool to track usage of the underlying application pre- and post-deployment, it currently does not have this capability
- Userlane offers training in only English and German languages, which may be a deterrent to the global clients
- Clients referenced expect Userlane to develop more expertise in automatic content translation and error detection during content creation. Some of the buyers also mentioned proactiveness as one of the areas of improvement

YesElf (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- YesElf’s digital adoption offering caters to clients across all buyer sizes from small- to large-sized enterprises. It serves both internal- and external-facing use cases and is focused on analyzing user behavior in real time to optimize the guidance provided
- The company continues to invest in developing formal partnerships with resellers, implementation partners, ISVs, and consultants to assist in processes from lead identification to setting up DAP. It also has established partnerships with technology vendors that help it to enhance its DAP offering
- One of YesElf’s key differentiators is its ability to identify instances of confusion in a user’s journey by tracking interactions such as empty clicks and mouse movements to trigger its guidance elements. Harnessing the power of next-generation technologies such as ML and AI, its recommendation engine suggests relevant walkthroughs to users in real-time
- The product is capable of tracking key metrics before deploying in-application guidance, as a part of which it provides insights to business application and feature usage. This provides clients feedback about the current level of adoption and usage of software and gives them an opportunity to measure Rol and KPIs
- Its analytics dashboard offers reports regarding activity time, audience, and sessions. In addition, it leverages process funnels to provide step-wise insights and OKRs to measure operation effectiveness and engagement

Limitations

- While YesElf has experience in serving clients in Continental Europe, it lacks clientele in other key geographies, which may be a deterrent to enterprises in North America, the UK, and Asia Pacific
- YesElf’s strategy is more focused on serving the internal-facing use cases and companies looking to leverage it for external-facing applications should carefully analyze its capabilities
- Currently, YesElf can support in-app guidance on mobile responsive and web-based applications, its capabilities are limited for desktop-based applications and does not support native mobile applications
- While the product has capabilities to measure confusion instances/rates, error rates, and overall progress for each enterprise application separately, it currently does not provide the ability to compare usage across multiple applications within the same dashboard. However, YesElf has this feature on its roadmap
- YesElf does not support automatic language translation for administrators to convert the existing walkthroughs to other languages and this capability is limited at a manual level

YesElf (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- To ease the process of content creation and maintenance for authors, YesElf now supports automatic walkthrough creation by recording and aggregating behavior of multiple users and application experts, which can be considered as one of its key strengths. It has also invested in improving the versioning and publishing process for administrators and authors
- YesElf employs a robust element detection technique defined by multiple selectors to ensure that the guidance provided is stable and less prone to failure. Further, automatic testing can be scheduled to proactively track, report, and rectify any error
- It provides in-app guidance through features such as walkthroughs, dynamic tooltips, knowledge base integration, checklists, notification/banner, and feedback. Other advanced capabilities include data validation, branched guidance, and ability to creating logics for audience segmentation and personalization
- As part of its automation capabilities, YesElf allows authors to define actions for the user such as clicks, redirects, typing inputs, and preselecting values to automatically proceed within a walkthrough. Walkthroughs can also be called via YesElf's API
- YesElf offers pre-built packages for both web-based applications such as Salesforce, SAP Concur, Workday, and Microsoft Dynamics 365 as well as Microsoft Teams' desktop application
- Reference buyers lauded the product's confusion detection functionality, level of customizations, ease of use and deployment, and cost-effectiveness, and appreciated YesElf's customer support











Limitations

- YesElf provides classroom training and relevant documentation to its clients, the training is only implemented by its training team and does not offer a certification program and online training
- Currently, the company offers training in English, which may be a deterrent to enterprises having a globally distributed workforce
- Referenced clients highlighted implementation planning, support for native-mobile applications, and multi-language documentation for the author and administrator as areas of improvement

Ziplyne (page 1 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Ziplyne aims to increase user adoption, customer onboarding as well as employee retention and productivity using its in-app guidance and walkthroughs
- While enabling the adoption of enterprise-based applications remains its key strength, it can cater to the needs of buyers looking to leverage guidance for customer-facing apps as well. Ziplyne also supports custom mobile applications on both iOS and Android through the mobile Software Development Kits (SDKs)
- Ziplyne provides contextual help for users and interactive walkthroughs that can be continued across applications. In addition to the walkthroughs, Ziplyne also offers other key features such as checklists for tasks, tooltips, notifications, in-app surveys, and pop-ups
- One of its key differentiators is that the guides can readjust automatically in case an element / element ID and/or page layout changes. If an element is missing, it can skip steps and move to the next available one
- Ziplyne has heavily invested in developing an integrated portal for administrators where they can view all the guides, set user segmentation rules, manage language translation through Google translator, integrate with third-party apps, assign role-based controls, and easily transfer the content created across multiple environments using the bulk migration capability for guides
- It offers internal diagnostic tools to test existing guides manually and proactively identify any issues that may occur during the process

Limitations

- While it has a significant presence in North America, Ziplyne’s experience in serving clients in other regions such as the UK and Rest of Europe, Asia Pacific, Latin America, and Middle East & Africa Pacific is limited vis-à-vis its peers
- Currently, it does not support the desktop-based applications and though Ziplyne provides SDKs and wrappers to support the creation of walkthroughs for native mobile applications, it does not offer the product as a completely SaaS-based model for native mobile applications
- Clients looking to reduce data entry errors in fields/forms in certain processes should carefully analyze its capabilities to support this use case
- It currently offers an ability to export only into Excel. Ziplyne currently does not support the ability to convert the created walkthroughs in other formats such as videos, pdfs, or slideshows. However, these are being developed
- Ziplyne currently does not have the ability to start a walkthrough from a random step (not only the first step onward)

Ziplyne (page 2 of 2)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- It provides content creators controls such as embedding content in formats such as videos, images, and audios, creating branched walkthroughs, rearranging steps using drag and drop, and accessing walkthrough version library
- The product supports walkthroughs on various browsers such as Google Chrome, Microsoft Edge, and Firefox. Ziptyne can be deployed and hosted on-premise and both private and public cloud when offered as a SaaS-based platform. It also supports customers seeking a combination of different hosting models
- Ziptyne can offer flexible pricing models based on the client's requirements. It also provides professional services such as guides creation and testing, business presentations for stakeholders, and guides strategy sessions
- It provides both online and offline trainings and a formal certification program in multiple languages that allows client admins, resellers, system integrators, users, and others to get trained by the Ziptyne experts, go through assessments, and become a certified professional. Additionally, it has invested in spreading awareness about DAP within its client's organizations through dedicated websites
- Buyers have appreciated its ease of use and deployment, ongoing support, breadth of services provided, and its platform maturity over the past few years

Limitations

- It currently does not offer any automation capabilities such as ability to automatically execute repetitive tasks within the underlying application, reducing the number of clicks by the users. Clients looking to reduce the time taken for completing a task through bots might find this solution less appealing
- Although Ziptyne offers analytics around walkthrough usage and step-wise tracking, there is scope to provide advanced analytics such as comparing usage analytics across multiple applications in a single view and pre-walkthrough deployment analytics. For example, it does not provide user behavior data based on clicks, user drop-off points, and error rates
- Referenced clients would also like to see automation, ability to provide support in all browsers and domains, more customization options, user issue reporting, and user tracking

05











Enterprise sourcing considerations

- Aspirants
-
- Aidaxis
 - HelpHero
 - HintEd
 - Pointzi

Aidaxis (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Aidaxis envisions to offer a robust and customized digital adoption tool for its clients. It aims to provide personalized and customized solutions for end users with focus on agility and adaptability of the software. It offers three modes of support to its users – guided, step-by-step guidance, and proactivity
- While enabling the adoption of browser-based applications is its key strength, it can support walkthroughs on both browser-based and desktop-based applications. It can cater to the needs of buyers looking to leverage guidance for enterprise-facing apps or customer-facing apps
- The company is continuously investing in making its element detection more sophisticated to support various applications and/or interface changes to ensure that walkthroughs created can be accessed post the changes
- It provides interactive walkthroughs that can be started from any point of the process and users can switch applications in between walkthroughs and still get contextual help. In addition to the walkthroughs, Aidaxis also offers other key features such as contextual help widget, tooltips, and pop-ups for notifications
- The product offers an easy-to-use assistance editor with step recorder and drag and drop options of steps, which non-technical people can use to create content quickly. It aims to decentralize the walkthrough creation and ease the approval processes











Limitations

- Aidaxis' operations in other geographies may not be as mature as their market presence in some countries in Continental Europe and hence, its experience in serving clients in regions such as North America, the UK, and Asia Pacific is limited vis-à-vis its peers
- While it has invested in developing capabilities in desktop and browser-based applications space, currently it cannot support mobile-based applications
- While clients have deployed the product on up to five applications, its experience in serving clients deploying DAP on more applications is untested so far
- The product currently does not offer checklists for tasks completed and data validation for inputs. Clients looking to reduce data entry errors in fields/forms in certain processes should carefully analyze its capabilities to support this use case
- Aidaxis does not have the ability to create general surveys or gather and generate dashboards and reports on metrics such as NPS or integrations with third party surveys
- The DAP does not have integration with any knowledge bases (such as LMS, Zendesk, and SharePoint) which might prove to be a deterrent for enterprises looking for integrating their existing LMS with the solution

Aidaxis (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- The content created can be manually converted to multiple languages by the author. The admin can automatically configure language preference based on users' preferences
- Aidaxis provides usage rate and assistance analysis with the help of Tableau. It allows the company to offer both flexible dashboards and specific dashboards, and the capability to get data from other applications to make cross analysis (for example, with support team app and LMS data). Aidaxis analytics can also be integrated with the BI software of the customer
- It provides online and offline training programs for its customers. Offered courses focus on the walkthrough creation process, guiding an end-user through a business process, and some of the enterprise best practices
- Referenced clients appreciated Aidaxis for customizing the DAP according to customer needs, providing flexibility, ability to deploy the software in different environments, ease of use, and proactive relationship management skills, especially the ongoing customer support











Limitations

- Enterprises looking for a continuous product support might find the solution less appealing as they do not have a 24/7 product support currently and there is no embedded product help tool for admins / content creators
- Though it provides training programs for its customers, the sessions conducted are only for learning purposes and no certification is offered after any program completion
- Although Aidaxis has some analytics capabilities, there is scope to provide more advanced analytics before deploying walkthroughs. For example, it currently does not provide user behavior data based on clicks, user drop-off points, and error rates
- Referenced clients also expect Aidaxis to provide some features such as integration with online support systems to grasp the attention of users and bring in some knowledge transfer abilities through integration with knowledge bases for the customers

HelpHero (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- HelpHero aims to provide efficient and effective onboarding experience to users during a digital adoption journey. Its main emphasis is on external-facing web-based application use cases to help product companies speed up user adoption for new launches and features
- The product offers guidance and learning on-the-go through features such as walkthroughs or “tours” embedded with videos, images, or surveys, self-help widget for on-demand content, and checklists for new users. The content created can be personalized and targeted toward a specific user group
- Content creator can create branched walkthroughs to ensure that the user has access to content most relevant to their interaction with the page. The author also has the ability to configure a tour to run across multiple pages or URLs
- HelpHero’s powerful URL matching engine allows the content creator to match against dynamic URL and different domains to trigger walkthroughs when a user lands on a particular page. It also has the ability to automatically start walkthroughs each time a user visits the page
- Its analytics tracks key metrics of the DAP such as completion rates, number of tours started vs. completed, step-wise breakdown, and drop-off points of the walkthroughs, thus, helping administrators measure and optimize performance











Limitations

- The majority of HelpHero’s clients are leveraging the product for external-facing applications and clients seeking DAP for internal-facing applications should consider its capabilities carefully
- While it supports mobile- and tablet-responsive applications, it is yet to develop the product to offer guidance for native-mobile and desktop-based applications
- HelpHero’s client base is highly skewed toward Small or Medium-sized Business (SMB) segment that may be a deterrent to large-sized clients
- Although HelpHero offers branching and user segmentation controls for content creators, it lacks add-on features such as tooltips, data validation, and an in-house survey tool
- Its value proposition is strong for clients focused on improving the onboarding experience with the help of on-screen guidance; however, clients seeking more sophisticated product with capabilities such as advanced analytics and automation may not find HelpHero’s current offerings to be suitable

HelpHero (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- The product offers integration with Intercom for all support-related conversations with the end user. Using the Intercom messenger, the support staff can share links to relevant walkthroughs, thus, enhancing overall user experience and reducing time spent
- It can be deployed for web-based and mobile-responsive applications and supports iframe. It supports a wide range of browsers and versions including Google Chrome, Mozilla Firefox, Safari, Microsoft Edge, and Internet Explorer (version 9 and above)
- HelpHero is compatible with HTML-based application. It supports different frameworks such as AngularJS, React, and Vue on the client-side and PHP, ASP.NET, etc., on the server rendered
- It also provides customization options such as custom theming, CSS, and buttons for administrators. In addition, the HelpHero layer can be fully customized to the branding of the underlying application
- HelpHero uses industry-standard TLS (Transport Layer Security) to protect all user-related data. The data is encrypted prior to storing on its servers. It also performs regular security testing and maintenance activities in-house
- The company offers customer support through email, chat, and call, along with documentation provided through the website











Limitations

- While HelpHero offers tiered pricing based on the number of Monthly Active Users (MAU) – both monthly and annually – and custom plans for enterprises, it does not offer a flexible-usage-based commercial model
- Currently, it does not offer any professional or consulting and training services for its clients, which may be a deterrent for clients seeking similar services when partnering with a vendor
- Additionally, HelpHero lacks the ability to offer remote maintenance, embedded product help tool, and 24/7 product support for administrators and content creators
- HelpHero's primary focus is custom-developed applications, hence, it does not offer any pre-built packages for commonly-used underlying applications

HintEd (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- HintEd provides user support, onboarding, and training to SMBs (<10,000 employees) for internal applications. It started its operations about 18 months ago and has a vision of introducing advanced analytics, cross-app guidance, automation, and contextual help to enterprise users to help them perform their work tasks faster
- It has a good market presence in Continental Europe, especially Russia, and is planning to expand to other geographies
- It can support web-based, PWA-based mobile, and Windows applications (works with Windows 7 and higher), which helps users have a multi-platform experience. HintEd supports walkthroughs on all major browsers such as Google Chrome, Chrome, Opera, Firefox, IE 10+, and Yandex
- HintEd has a robust element detection mechanism and records different element selectors for web applications as well as for Windows applications, thus bringing more stability to walkthroughs even when certain elements of the application changes, such as positions of various elements
- It provides cloud, hybrid (on-premise and cloud), and full on-premise hosting options to its clients in line with the privacy requirements of Russia and other countries
- In addition to the walkthroughs, HintEd also offers other key features such as checklists, tooltips, and self-help widget for web applications with the list of available walkthroughs











Limitations

- HintEd has more expertise in serving SMBs and is highly skewed toward buyers in Continental Europe. Clients seeking to deploy DAP in other geographies should consider its capabilities carefully
- While clients have deployed the product on up to five applications, its experience in serving clients deploying DAP on more applications is untested so far
- While it can support applications across web, desktop, and PWA-based mobile, it does not have capabilities to support applications on native mobile / tablets
- It currently does not have consolidated or customized dashboards to compare the usage and adoption of various applications (such as Salesforce and Workday) across the enterprise, which may be a limitation for some clients
- HintEd offers product support only during working hours, there is no 24/7 support or product help tool for admins and content creators
- It currently does not offer in-app messages (announcements, banners), and data validation for inputs into forms/fields
- While HintEd provides walkthroughs for processes in a single application, it does not currently support walkthroughs for workflows that span across multiple applications

HintEd (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- HintEd supports creation of automation triggers via walkthroughs editor. It provides options to choose from multiple trigger events, which allows creating context conditions for walkthroughs
- It allows creating step-by-step guides and tooltips through single no-code editor. HintEd has a step recorder for content creation and allows editors to rearrange steps with drag and drop options. It supports creating user groups and assigning walkthroughs for these groups in the admin dashboard
- The product can be exported into SCORM compliant LMS to enable users to access the created content within the LMS
- HintEd tracks usage statistics such as scenarios played, finished, or stopped. The data is available via admin dashboard and can be also downloaded in .csv format
- Referenced clients have appreciated HintEd's fast and flexible content creation, ease of implementation, interactive guides as well as the ongoing support provided to the customers

Limitations

- Although HintEd has some usage analytics capabilities, there is scope to provide more advanced analytics before deploying walkthroughs. For example, it currently does not provide user behavior data based on clicks and user error rates
- HintEd does not have the ability to create general surveys, gather and generate dashboards and reports on metrics such as NPS or integrations with third party surveys
- Enterprises might face some difficulty to do content updates as a built-in version control is currently not available for the content library
- It currently does not offer any automation capabilities such as ability to automatically execute repetitive tasks within the underlying application, reducing the number of clicks by the users
- The product currently does not offer conversion of in-app guidance content into formats such as PDF, slideshows, and videos
- Buyers would like to see integrations with the LMS systems, more analytics, support for mobile and older versions of desktop applications, and automation

Pointzi (page 1 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- Pointzi’s focus is to improve the user experience across key use cases such as onboarding, feature discovery, and user feedback. It has deep expertise in providing support on native mobile applications and continues to develop capabilities for web-based applications as well
- It currently supports multiple platforms ranging from web-based applications via plug-ins and JavaScript code implementation and Android- and iOS-based applications with the help of React Native, Cordova, Capacitor, and Ionic
- The product offers authors various customization options such as templates and advanced styling for walkthroughs, tooltips, and modals/announcements. It also provides the option for authors to add resources such as videos, images, and documents to the guidance
- It offers the content creators the ability to deploy walkthroughs that span multiple web pages. In case an app supports a URL convention, guidance can be provided on multiple mobile-based applications
- Pointzi provides various segmentation logics for administrators to deliver targeted walkthroughs to various user groups for better experience. The product has the ability to launch guidance based on parameters such as previous interactions and time spent

Limitations

- While Pointzi is capable of offering in-app guidance support for employee-facing applications, its primary focus continues to be on the customer-facing side, which may be a deterrent to clients seeking DAP for internal usage. However, they have recently invested in creating a solution for internal usage
- A majority of Pointzi’s client base consists of small-sized buyers and its experience in serving medium- and large-sized clients is relatively low
- Most of its DAP deployments have been for mobile-based applications and clients looking to deploy it on web-based applications should analyze its capabilities carefully
- While Pointzi is considering formalizing partnerships with resellers, it has not yet established an extensive partnership ecosystem
- Although the product has a contextualized FAQ list, it lacks the checklist feature for onboarding new users. It also does not support content evaluation as part of data validation and can only check if a response has been added to a field
- Pointzi can offer API-based triggering on a custom basis, but it currently does not offer any other advanced capabilities leveraging automation, AI, and NLP

Pointzi (page 2 of 2)

Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Product capability	Analytics & reporting	Implementation & support	Engagement & commercial model	Overall
									

Strengths

- The product’s analytics offers administrators and decision makers the ability to view the performance of guides such as completion rates and drop-off points of the walkthroughs and user-related metrics such as number of interactions and time spent
- It offers administrators the ability to view reports for web- and mobile-based applications as part of the same dashboard and can be filtered if needed. In addition, the data collected can be downloaded as a CSV file
- The product can also be integrated with third-party analytics tools such as Amplitude, Segment.io, Mixpanel, and other tools with the help of webhooks
- Pointzi improved its architecture to allow for multi-tenancy deployments. It does not capture any field data and user-input data to maintain user privacy and provide a secure environment for user interaction. The customer may internally collect some user data for audience segmentation and triggering purposes
- It offers full-length documentation for content creators and administrators in addition to the training, consulting, and developer support services

Limitations

- Clients seeking flexible deployment and hosting models may need to evaluate Pointzi’s capability carefully as it only supports the public cloud-based option and does not offer the private cloud and on-premise model yet
- The company currently provides online training programs in-house. However, it does not provide classroom training programs or a certification course to content creators and administrators
- The training offered is in only English, which may be a deterrent to clients looking for a DAP solution for users across multiple geographies
- While Pointzi provides sample templates and walkthroughs to content creators, it currently does not offer any pre-built packages to fast-track DAP deployments on widely used applications
- Pointzi is yet to develop a robust customer support system with remote maintenance and 24/7 support options for content creators and administrators

06

Appendix

- Glossary
 - Research calendar
-

Glossary of key terms used in this report (page 2 of 2)

Administrator	Responsible for initial customization and personalization settings to suit the underlying software's appearance, for testing or previewing the walkthrough and publishing it, and for assigning user-based roles. Responsible for creating user segments and the content specific to a particular segment
Balloon	This forces the user to interact with the underlying application either directly (by clicking on the element or engaging with the software) or indirectly (by engaging only with the balloon)
Dynamic tooltips	Dynamic tooltips highlights specific items on the page to attract user's attention
Checklist	A list that showcases important tasks that need to be fulfilled by the users and indicates the progress
CoE	Center of Excellence; an entity responsible for providing shared resources such as best practices and training support
Content creator / walkthrough creator	Also known as the walkthrough author or editor. Responsible for creating, editing, and maintaining the guidance content such as walkthroughs, tooltips, and pop-ups
Customer-facing application	Applications that are rolled out by product companies, SaaS companies, or by enterprises that are used by external users such as customers or website visitors etc.
Employee-facing application	Applications used internally in an organization to assist the employees in their day-to-day tasks
End user	The one that interacts with the underlying software with the help of the overlaying DAP technology and completes a process or workflow
GDPR	General Data Protection Regulation; a regulation in the European Union (EU) and the European Economic Area (EEA) that requires businesses to protect the personal data and privacy of EU citizens for transactions that occur within EU member states
ISV	Independent Software Vendor; vendor that develops, markets, and sells software in a marketplace
NPS	Net Promoter Score; an index that measures the willingness of customers to recommend a product or service to others
OEM	Original Equipment Manufacturer; an OEM provides the components in another company's product, working closely with the seller (VAR) of the finished product
OKR	Objectives and Key Results; a goal-based system used to define and drive outcomes toward goals
Pop-up	It can be used for making company-wide announcements/news or to notify or alert users about new/upcoming features

Glossary of key terms used in this report (page 2 of 2)

SCORM	Sharable Content Object Reference Model; a collection of standards and specifications for web-based electronic educational technology
SI	System Integrator; vendor that focuses on combining and implementing technological applications to meet the needs of an organization
Tooltip	It provides additional context/information about the element or button. It can also be used to launch walkthroughs
Walkthrough	Walkthrough is a combination of balloons, help widget, and tooltips that provides in-application step-by-step guidance to the users
Widget	A window that includes a list of FAQ items for quick access or a list of walkthroughs specific to that page. It can also be employed to display relevant content from a knowledge base
XLIFF	An XML-based format used to standardize the way data (language) is translated from default/primary to a localized/secondary data (language)
VAR	Value-Added Reseller; adds value to the product received from OEM and sells it in the marketplace as a finished product

Research calendar

Human Resources Outsourcing (HRO)

Published
 Planned
 Current release

Flagship HRO reports

	Release date
Multi-process Human Resources Outsourcing (MPHRO) Services – Service Provider Compendium 2021	February 2021
Multi-process Human Resources Outsourcing (MPHRO) – State of the Market Report 2021	February 2021
Rewards and Recognition (R&R) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2021	March 2021
Rewards and Recognition (R&R) Solutions State of the Market Report 2021: The Era for Modernizing Employee Engagement	June 2021
Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2021	June 2021
Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2021	August 2021
Learning Services Provider Profile Compendium 2021	Q3 2021
Digital Adoption Platform (DAP) Products Provider Profile Compendium 2021	Q3 2021
Multi-country Payroll (MCP) Solutions PEAK Matrix® Assessment 2021	Q3 2021
Digital Adoption Platform (DAP) Products – State of the Market Report 2021	Q4 2021
Multi-country Payroll (MCP) Solutions Annual Report 2021	Q4 2021
Multi-country Payroll (MCP) Solutions Service Provider Profile Compendium 2021	Q4 2021

Thematic HRO reports

	Release date
Employment Outsourcing Models	March 2021
Employee Experience Management (EXM) Platforms	June 2021
Payroll 4.0: A New Era for Global Payroll	July 2021
Human Resource Outsourcing (HRO) 4.0: Reinventing the HR Function	Q3 2021

Note: For a list of all of our published HRO reports, please refer to our [website page](#)

Research calendar

Service Optimization Technologies (SOT)

Published
 Planned
 Current release

Flagship SOT reports

	Release date
Intelligent Process Automation (IPA) – Solution Provider Landscape with Solutions PEAK Matrix® Assessment 2021	March 2021
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	April 2021
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	May 2021
Intelligent Document Processing (IDP) – Technology Vendor Compendium 2021	June 2021
Intelligent Document Processing (IDP) State of the Market Report 2021 – Key to unlocking value in documents	June 2021
Intelligent Process Automation (IPA) – State of the Market Report 2021	June 2021
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	August 2021
Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2021	August 2021
Conversational AI – State of the Market Report 2021	Q3 2021
Digital Adoption Platform (DAP) Products Provider Profile Compendium 2021	Q3 2021
Digital Adoption Platform (DAP) Products – State of the Market Report 2021	Q4 2021

Thematic SOT reports

	Release date
AI Start-ups Redefining Business Processes: Top 30 Trailblazers	December 2020
Understanding Cloud-native RPA	January 2021
Mine Your Journey to Digital Excellence	March 2021
Intelligent Document Processing (IDP) Playbook 2021	June 2021
Process Mining Playbook 2021	June 2021

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