Everest Group®

Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2023

September 2023

Copyright © 2023 Everest Global, Inc.
*This document has been licensed to **WalkMe***

Contents

1. **Introduction and overview** **4**
   - Research methodology 5
   - Background and scope of the research 7
   - Understanding DAPs 8
2. **Summary of key messages** **11**
3. **DAP PEAK Matrix®** **13**
   - Products PEAK Matrix evaluation dimensions 15
   - DAP PEAK Matrix 2023 17
   - Characteristics of Leaders, Major Contenders, and Aspirants 18
   - Distinguished features of Star Performers 19
   - Technology provider capability summary dashboard 21
4. **DAP market – competitive landscape** **25**
5. **Enterprise sourcing considerations** **30**
   - Leaders 30
     - Pendo 31
     - WalkMe 33
     - Whatfix 35
   - Major Contenders 37
     - AppLearn 38
     - AppNavi 40
     - Apty 42
     - HintEd 44

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

Sharath Hari N, Vice President

Anwesha Chakraborty, Senior Analyst

Era Singh, Senior Analyst

Everest Group®

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Contents

- Major Contenders (continued)
  - Improved Apps 46
  - Knowmore 48
  - Lemon Learning 50
  - MyGuide by Cornerstone 52
  - myMeta Software 54
  - Newired 56
  - SAP Enable Now 58
  - Stonly 60
  - Toonimo 62
  - tts GmbH 64
  - Userlane 66
  - Ziplyne 68
- Aspirants 70
  - Aidaxis 71
  - Gyde 73
  - Shortways 75
  - Spekit 77

6. Appendix 79

Glossary 80

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

01

Introduction and overview

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

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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

01

Robust definitions and frameworks

Function specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

Primary sources of information

Annual contractual and operational RFIs, 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 providers

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

Year-round tracking of 23+ DAP software 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, providers, technology providers, and industry associations

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

This report is based on multiple sources of information

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

Demonstrations and interactions with technology providers and other industry stakeholders
- Detailed demos and interviews with DAP technology providers for a comprehensive view of the products
- Interviews with technology providers' reference clients
- Executive-level discussions with technology providers as well as service providers that cover:
  - Current state of the market
  - Opportunities and challenges
  - Expected direction of movement in the industry
  - Technology provider's / service provider's vision and roadmap
- Executive-level discussions with industry enablers / specialist system integrators to get the buyer perspective, and to reaffirm the findings from other sources
- On-site as well as conference meetings with enterprise DAP buyers to understand:
  - Vision and objectives
  - Buying criteria
  - Apprehensions and challenges
  - Outcomes achieved
  - Future direction

Proprietary database of RPA and AI capabilities of ~100 leading providers and 50+ BPS providers complements the research
The database tracks the following capability elements for each technology/service provider:
- Clients with automation deployments, scale and scope of deployments, cost savings, and case studies
- Automation client portfolio across buyer sizes, geographies, industries, and BPS segments
- Vision and strategy, top automation solutions, their value propositions, and RPA and AI features
- Technology partnerships and collaborations with academic institutes

Providers assessed[1]

Aidaxis, AppLearn, AppNavi, apty, Gyde, HintEd, IMPROVEDAPPS, knowmore, Lemon Learning, myGuide, myMeta, NEWIRED, pendo, SAP Enable Now, shortways, stonly, Spekit, tts digital adoption solutions, Toonimo, userlane, walkme, whatfix, Ziplyne

1 Assessment for Gyde, Lemon Learning, and Spekit exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with DAP buyers

The source of all content is Everest Group unless otherwise specified

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract-specific will only be presented back to the industry in an aggregated fashion

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Background and scope of the research

The way we work is changing with technology advancing at a rapid pace. In order to remain competitive, evolving into a digital-first business is becoming imperative for enterprises across all industries. However, value realization from digital transformation initiatives can be significantly delayed if the users are not adequately trained and equipped to use new technologies effectively. To overcome these challenges and ensure business continuity and success in the digital workplace, Digital Adoption Platforms (DAP) provide in-application guidance to facilitate seamless adoption and learning of new technologies. DAPs have played a key role in helping organizations to not only achieve benefits such as accelerated digital transformation, user onboarding and training, and change management, but have also opened avenues to cater to broader business use cases such as optimized software spending, data integrity, enterprise-wide search, and enhanced customer and employee experience.

The DAP technology landscape is rapidly evolving, with an expanding set of features and functionalities, deployment options, partner ecosystems, and commercial models. DAP providers are investing in advanced analytics to provide visibility into user behavior and application usage, as well as automating repetitive tasks to drive user productivity. Therefore, as the DAP market continues to mature, it is crucial for organizations to select the right enterprise-grade DAP solution to realize the expected benefits.

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

- Overview of DAP software products
- Everest Group's DAP PEAK Matrix® evaluation, a comparative assessment of 23 DAP technology providers
- Competitive landscape of the DAP technology provider market
- Remarks on key strengths and limitations of each DAP technology provider

Scope of this report

Assessment
Assessing the DAP software available in the market for independent licensing; operational and product information as of Q1 2023

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

Technology providers
Covers 23 DAP technology providers including Aidaxis, AppLearn, AppNavi, Apty, Gyde, HintEd, Improved Apps, Knowmore, Lemon Learning, MyGuide by Cornerstone, myMeta Software, Newired, Pendo, SAP Enable Now, Shortways, Stonly, Spekit, Toonimo, tts GmbH, Userlane, WalkMe, Whatfix, and Ziplyne

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Understanding DAPs (page 1 of 3)

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

NOT EXHUASTIVE

Users

- Employees/partners
- Customers
- Administrators and walkthrough authors
- Product and business leaders

DAP

Ancillary

- Surveys and user feedback
- Announcements and news
- Knowledge management
- Advanced analytics
- Automation

Core

- In-application guidance
- Basic analytics

Application type

- Browser-based applications
- Native mobile / tablet applications
- Desktop applications

Underlying applications

- Employee-/partner-facing
- Customer-facing

Key benefits

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

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Understanding DAPs (page 2 of 3)

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

In-app guidance

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

Analytics

- **Basic analytics**: It offers insights across user interactions with DAP content
- **Advanced analytics**: It allows enterprises to understand user behavior and areas of digital friction pre-DAP implementation and overall digital adoption

Automation

It offers automated walkthroughs and gets user inputs only when necessary, thereby minimizing the number of empty clicks by users and increasing productivity.

Surveys and user feedback

It has the 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

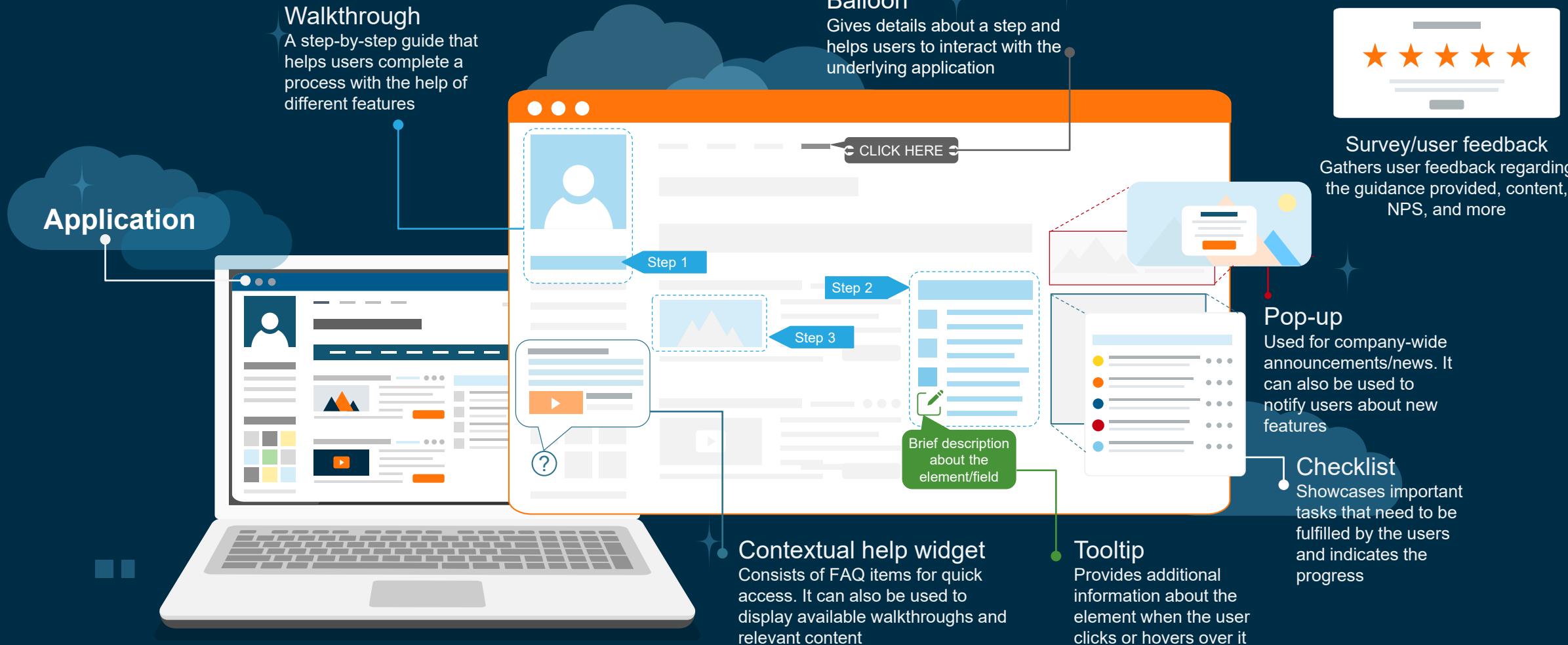
It provides the ability to convert the walkthroughs to other formats such as PDFs and slideshows. It also enables users to access the relevant information from the self-help widgets and centralized knowledge portals.

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Understanding DAPs (page 3 of 3)

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

ILLUSTRATIVE



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, and more

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

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

02

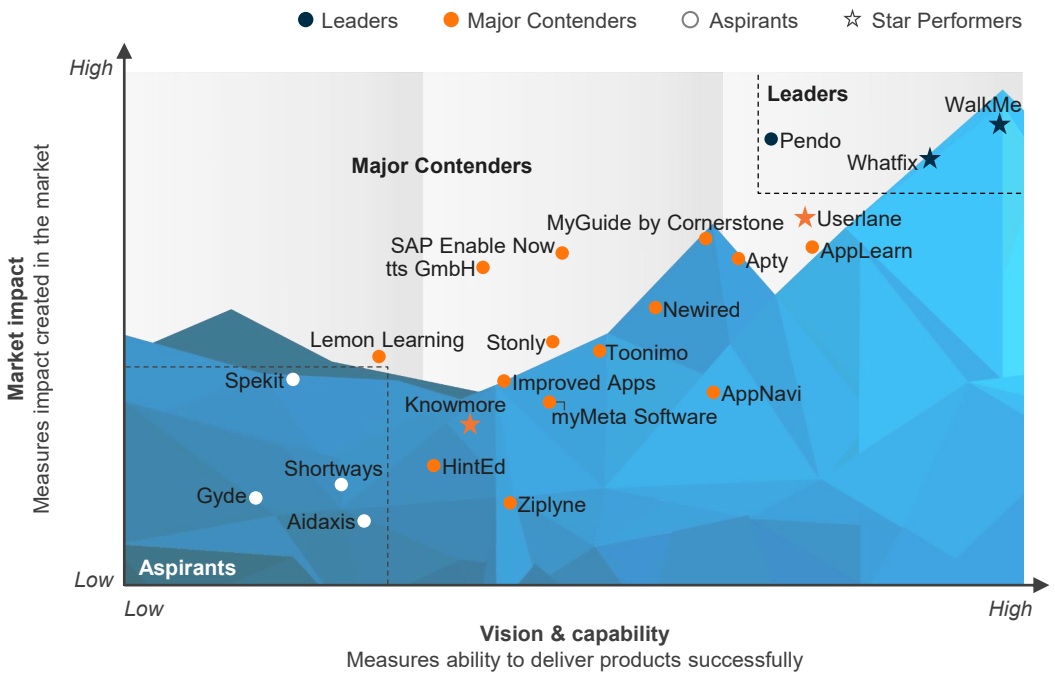
Summary of key messages

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Summary of key messages

- The Products PEAK Matrix® is a proprietary framework used to assess the market impact and overall vision and capability of technology providers
- Everest Group classifies 23 DAP technology providers on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
  - **Leaders:** Pendo, WalkMe, and Whatfix
  - **Major Contenders:** AppLearn, AppNavi, Apty, HintEd, Improved Apps, Knowmore, Lemon Learning, MyGuide by Cornerstone, myMeta Software, Newired, SAP Enable Now, Stonly, Toonimo, tts GmbH, Userlane, and Ziplyne
  - **Aspirants:** Aidaxis, Gyde, Shortways, and Spekit
- Based on the Year-on-Year (YoY) movement of different DAP providers on the PEAK Matrix®, Everest Group identified four providers as the 2023 DAP Market Star Performers – Knowmore, Userlane, WalkMe, and Whatfix
- WalkMe, Pendo, and Whatfix account for more than 60% of the annual DAP revenue
- WalkMe emerged as the top contributor of net new revenue added to the market; Pendo, Whatfix, and Userlane have also made significant contribution

Everest Group Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2023[1]



1 Assessment for Gyde, Lemon Learning, and Spekit exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with DAP buyers

Note: Star Performers are selected based on a relative comparison of providers' performance on the market impact and vision and capability dimensions in the previous and latest PEAK Matrix® assessments. Providers with the highest YoY 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 (2023)

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

03

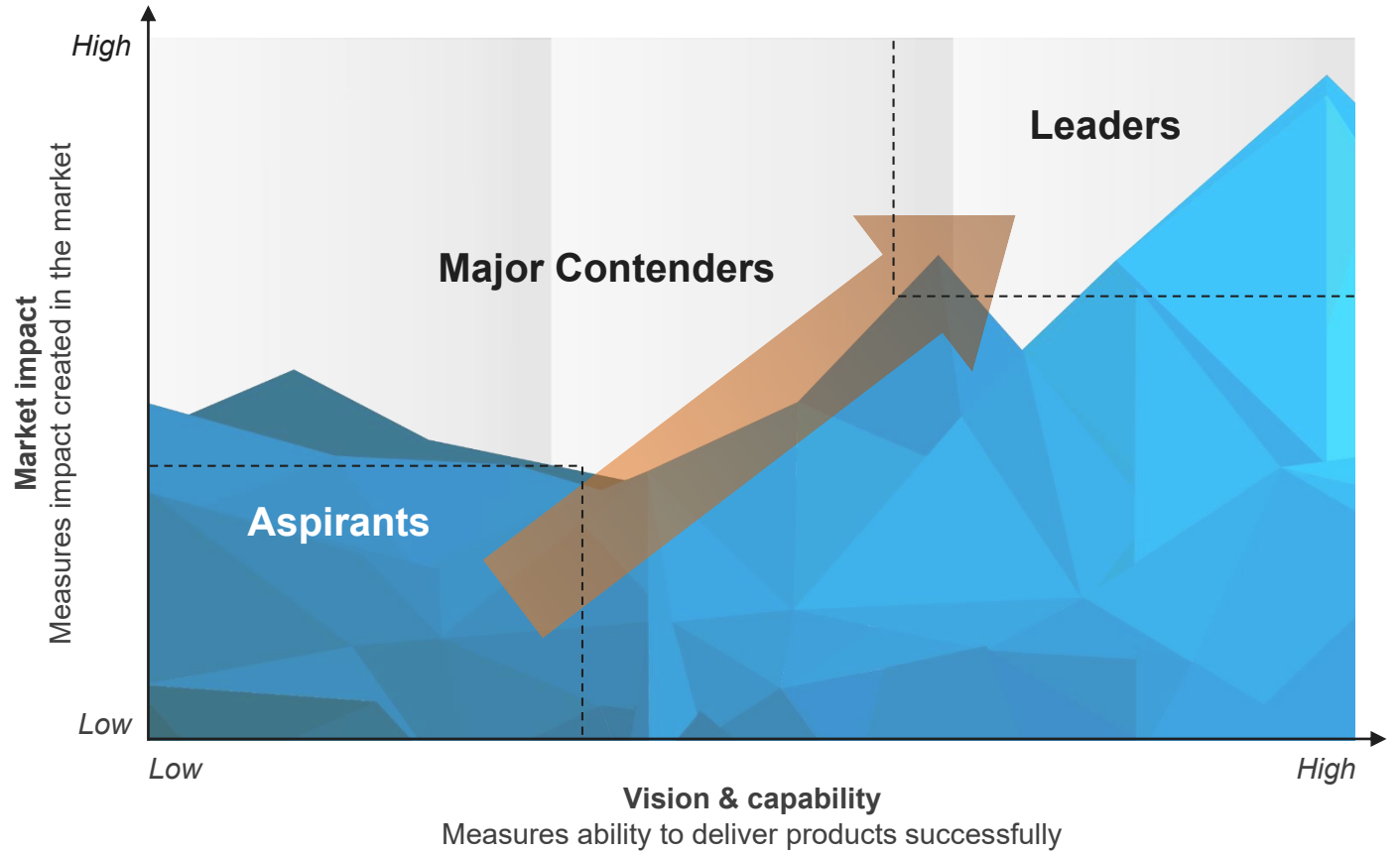
DAP PEAK Matrix® characteristics

- Products PEAK Matrix evaluation dimensions
- DAP PEAK Matrix 2023
- Characteristics of Leaders, Major Contenders, and Aspirants
- Distinguished features of Star Performers
- Technology provider capability summary dashboard

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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

Everest Group PEAK Matrix



Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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

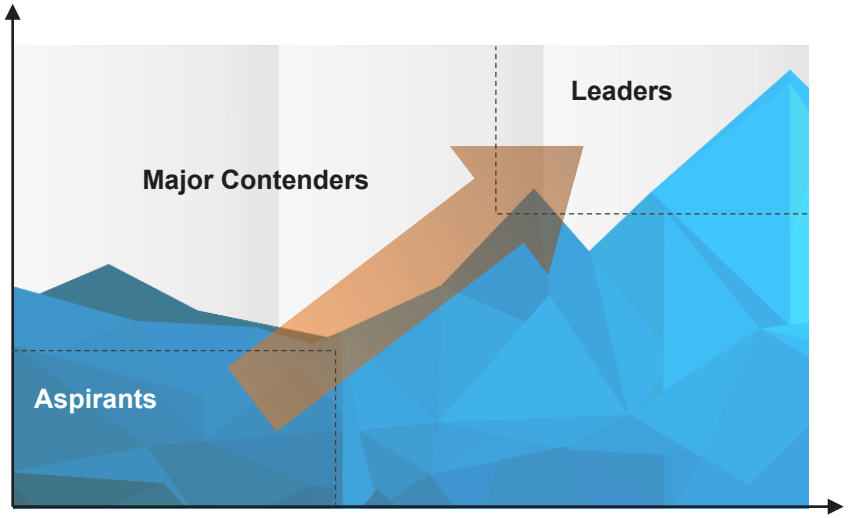
Portfolio mix

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

Market impact



Vision & capability

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

Vision and strategy

Vision for the client and itself; key investments, future roadmap, and strategy

Product capability

Technical sophistication and breadth/depth across the product, including customizability, data security, and compliance

Analytics and reporting

Breadth/depth of analytics including usage analytics, user behavior tracking, and workflow analytics

Implementation and support

Deployment options, training and certification, product maintenance, support services, and partnership ecosystem

Engagement and commercial model

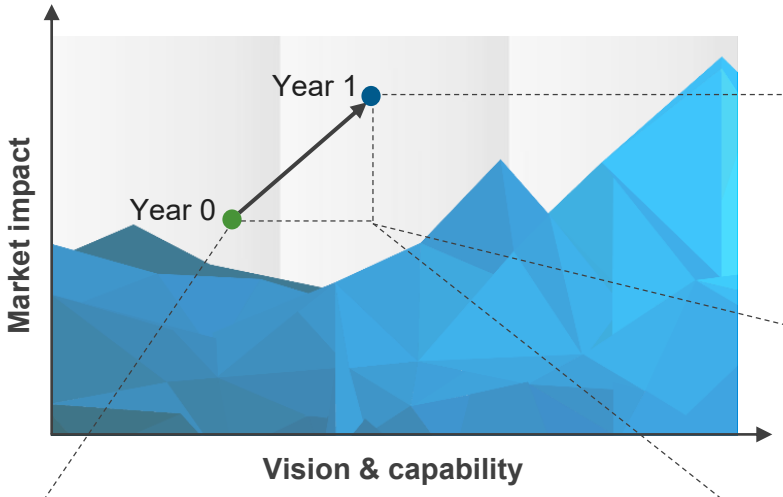
Progressiveness, effectiveness, and flexibility of engagement and commercial models

Everest Group® Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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



In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:

- Yearly YoY revenue growth
- # of new licenses and extensions
- Value of license signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each provider's performance across a number of parameters including:

- Innovation
- Increase in product scope and functionality
- Expansion of product associated consulting, training, support, and maintenance capabilities
- Technology/domain specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:

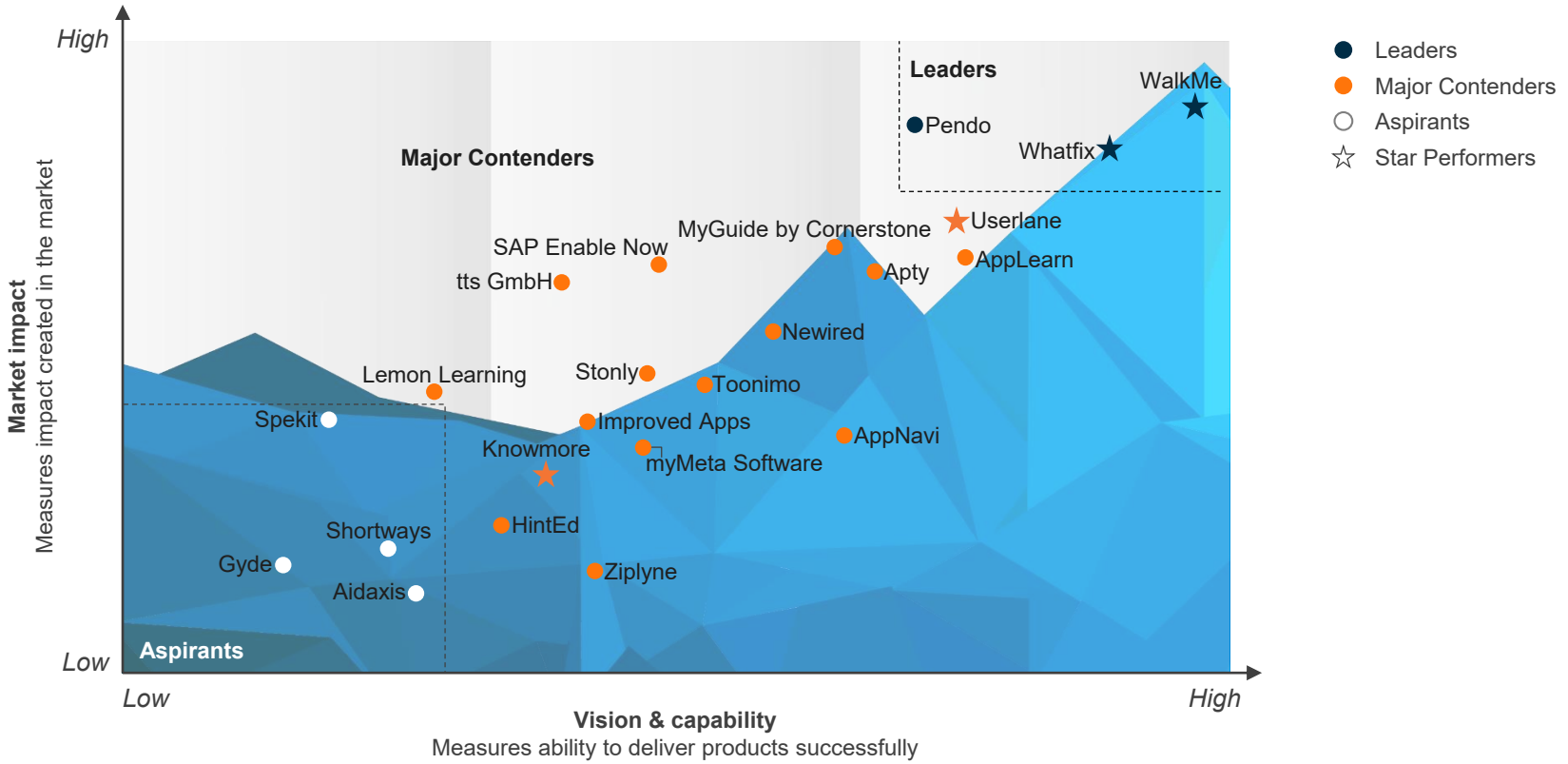
- The maximum number of top-quartile performance improvements across all of the above parameters AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

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

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Everest Group PEAK Matrix®
Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2023

Everest Group Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2023[1]



1 Assessment for Gyde, Lemon Learning, and Spekit exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with DAP buyers
Note: Star Performers are selected based on a relative comparison of providers' performance on the market impact and vision and capability dimensions in the previous and latest PEAK Matrix® assessments. Providers with the highest YoY 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 (2023)

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Digital Adoption Platforms (DAP) PEAK Matrix® characteristics

Leaders

Pendo, WalkMe, and Whatfix

- Leaders continue to maintain their stronghold in the market and further penetrate major geographies, industries, and buyer size segments by both the acquisition of new clients as well as the scaling of the existing deployments in enterprises. They are aiming to explore untapped market opportunities through partner sales channels
- By adopting a multi-product strategy, Leaders have created a robust product roadmap centered around making DAP a next-generation solution by infusing AI and bringing in advanced capabilities such as enterprise search, robust element detection, process discovery, automation, and pre-built templates for key business applications and industry-specific solutions
- With the growing complexity of their offerings, Leaders are overhauling their commercial models to make them modular and scalable and investing heavily in offering superior professional services, customer success, and value realization and CoE frameworks to their clients

Major Contenders

AppLearn, AppNavi, Apty, HintEd, Improved Apps, Knowmore, Lemon Learning, MyGuide by Cornerstone, myMeta Software, Newired, SAP Enable Now, Stonly, Toonimo, tts GmbH, Userlane, and Ziplyne

- Major Contenders are expanding their presence across industries, geographies, and buyer size segments. Following the Leaders, Major Contenders are also investing to bring in newer capabilities such as analytics to track user behavior, application usage, and drop-off points; create robust knowledge management capabilities; enable automated language translation; facilitate cross-application guidance; create native surveys; and enable better content creation and publication experience
- A few Major Contenders are differentiating themselves by investing in more automation, strengthening user segmentation and targeting capabilities, building the ability to modify the workflow and simplify the UI/UX of underlying applications, and adopting a template-based approach to ensure consistency in the look and feel of the DAP content

Aspirants

Aidaxis, Gyde, Shortways, and Spekit

- Most Aspirants presently focus on a specific use case or geography with further scope to improve their overall thought leadership and vision for the market. While they have been successful in forging some partnerships, they are yet to establish a solid partnership ecosystem to increase their reach and capabilities
- Aspirants continue to invest in strengthening their in-app guidance and out-of-the-box basic analytics. They are bringing in more customization options for content creators and have limited use cases of employing technologies such as AI, ML, and automation

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Everest Group has identified four technology providers as the 2023 Star Performers (page 1 of 2)

DAP technology Star Performers	Distinguishing features of market success in 2023	Distinguishing features of capability advancements in 2023	Change in PEAK Matrix® positioning for Digital Adoption Platform
knowmore	• Received high buyer satisfaction / value delivered scores for 2022 • Enhanced its presence in key industries such as BFSI, retail, and public sector, while maintaining its presence in telecom and manufacturing industries	• Invested heavily in enhancing the robustness of walkthroughs by offering multiple levels of content validity checks, such as a dashboard to display broken content, color-coded check marks, and an advanced rules controller • Strengthened its commitment to accessibility by securing RGAA certification, a recognized web accessibility standard in France • Enhanced its UI/UX and improved editing with broadcast status dashboard, integrated localization, offline edition, and ability to produce e-learning and DAP content in one go	Moved from **Aspirants** to **Major Contenders**
userlane	• Significantly expanded its outreach to multiple geographies – the UK and the US • Received one of the highest buyer satisfaction / value delivered scores for 2022 • Ranked among the top 20% of providers in terms of net new revenue growth	• Brought in HEART analytics to help buyers monitor value realization across enterprise applications, and made significant improvements to its data visualization capabilities with multi- and cross-app dashboards • Invested in AI-based data validation where clients can use regular expression and natural language to create validation rules • Started offering the flexibility to deploy its product on any cloud infrastructure such as Microsoft Azure, AWS, Google, and Oracle with multiple hosting regions • Redesigned its editor to ease content creation further and added several additional content types	Strengthened its **Major Contenders** positioning

Source: Everest Group (2023)

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Everest Group has identified four technology providers as the 2023 Star Performers (page 2 of 2)

DAP technology Star Performers	Distinguishing features of market success in 2023	Distinguishing features of capability advancements in 2023	Change in PEAK Matrix® positioning for Digital Adoption Platform
walkme	• Received higher buyer satisfaction / value delivered scores than 90% of the providers evaluated for 2022 • Experienced the highest net new revenue growth • Sustained a well-diversified client portfolio spanning various geographies, industries, and enterprise application coverage	• Became the first DAP provider to be FedRAMP certified • Started offering WalkMe Discovery to provide buyers visibility into software across their organization to support them in optimizing software spend • Enhanced its distinctive offering, UI Intelligence, by incorporating additional functionalities • Continued to broaden its network of strategic partnerships, reinforcing its capabilities and extending its global reach • Invested in integrating more enterprise applications with Workstation and added personalization tools	Strengthened its **Leaders** positioning
whatfix	• Registered a strong YoY growth in DAP revenue and number of clients in 2022 • Continued to maintain a diversified portfolio of clients across all major geographies and industries • Improved its overall customer satisfaction and value delivered to customers	• Achieved one of the highest growths in the number of partnerships and launched a new partner program called Rise 2 Excellence (R2E) • Launched Product Analytics to enable organizations to track, visualize, and analyze user engagement and behavior data • Revamped its pricing and packaging model to enable better scalability and flexibility for enterprises • Enhanced desktop and mobile capabilities and increased focus on internationalization to cater to a diverse workforce	Strengthened its **Leaders** positioning

Source: Everest Group (2023)

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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

Leaders

Measure of capability: Low High

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

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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

Major Contenders (page 1 of 2)

Measure of capability: Low High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall
AppLearn										
AppNavi										
Apty										
HintEd										
Improved Apps										
Knowmore										
Lemon Learning										
MyGuide by Cornerstone										
myMeta Software										

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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

Major Contenders (page 2 of 2)

Measure of capability: Low High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall
Newired										
SAP Enable Now										
Stonly										
Toonimo										
tts GmbH										
Userlane										
Ziplyne										

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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

Aspirants

Measure of capability: Low High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall
Aidaxis										
Gyde										
Shortways										
Spekit										

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

04

DAP market – competitive landscape

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Overall market share – annual realized license revenue

WalkMe, Pendo, and Whatfix account for more than 60% of the annual DAP revenue

Providers' DAP market share by annual realized license revenue; 2022
(Providers are listed in alphabetical order within each category)

>40%	walkme
>20%	pendo
5-10%	whatfix
1-5%	AppLearn, apty, myGuide, SAP Enable Now, tts digital adoption solutions, userlane
<1%	Aidaxis, AppNavi, GYDE, HintED, IMPROVEDAPPS, knowmore, Lemon Learning, myMeta, NEWIRED, shortways, Spekit, stonly, Toonimo, Ziplyne

Note: Market share is calculated based on the overall market size
Source: Everest Group (2023)

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Overall market share – net new revenue

WalkMe emerged as the top contributor of net new revenue added to the market; Pendo, Whatfix, and Userlane have also made significant contribution

Providers' DAP market share by net new revenue; 2022
(Providers are listed in alphabetical order within each category)

>30%	WalkMe
>15%	Pendo, Whatfix
4-10%	Userlane
2-4%	AppLearn, Apty, myGuide
<2%	Aidaxis, AppNavi, Gyde, HintED, IMPROVEDAPPS, knowmore, Lemon Learning, myMeta, NEWIRED, SAP Enable Now, shortways, Spekit, stonly, Toonimo, tts digital adoption solutions, Ziplyne

Source: Everest Group (2023)

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Industry diversity

Pendo, WalkMe, and Whatfix are among the leading players across major industries; Userlane, AppLearn, and MyGuide by Cornerstone are the other providers with a high market share across industries

Providers with the largest share of DAP annual license revenue in the top five industry verticals; 2022
Top five providers with respect to DAP license revenue (in alphabetical order)

BFSI	Healthcare and pharmaceutical	Hi-tech
AppLearn, myGuide, pendo, walkme, whatfix	myGuide, pendo, userlane, walkme, whatfix	apty, myGuide, pendo, walkme, whatfix

Manufacturing	Professional services
AppLearn, pendo, userlane, walkme, whatfix	pendo, tts digital adoption solutions, userlane, walkme, whatfix

Source: Everest Group (2023)

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Major geographies

WalkMe, Whatfix, and Pendo have a strong presence across major geographies; Apty, AppLearn, and Userlane are other dominant providers in some geographies

Providers' share of DAP license revenue in major geographies; 2022
Top providers with respect to DAP license revenue (in alphabetical order)

North America	Latin America	United Kingdom	Middle East & Africa	Continental Europe	Asia Pacific
apty	pendo	AppLearn	AppLearn	tts digital adoption solutions	apty
myGuide	stonly	pendo	pendo	userlane	myGuide
pendo	userlane	userlane	userlane	pendo	pendo
walkme	walkme	walkme	walkme	walkme	walkme
whatfix	whatfix	whatfix		whatfix	whatfix

Source: Everest Group (2023)

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

05

Enterprise sourcing considerations

- Leaders
  - Pendo
  - WalkMe
  - Whatfix

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Pendo (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall
●	◕	◕	◕	◕	◕	●	◕	◕	◕

Strengths

- Pendo has one of the most mature DAP product portfolios for the customer-facing use cases for its buyers. Such buyers form a large part of its clientele. The provider has invested in developing its capabilities for employee-facing use cases and has a robust AI-driven product roadmap
- One of the main differentiators is the breadth and sophistication of the analytics that it offers. It continues to enhance its analytics and offers a portfolio overview tab, which enables its clients to have a comprehensive overview of their applications and how they are being used
- The provider has brought in a dashboard that allows clients to track users' license utilization over time to identify usage patterns and make optimization decisions
- It offers workflow and process analytics (without deploying walkthroughs) to identify inefficiencies as users navigate within and across apps to complete processes, which can then be used to segment users for targeted support
- Pendo has enhanced its content creation experience and management and offers the ability for administrators to categorize walkthrough portfolios better, enable automatic recommendation of the walkthrough layout, and enhance the ability to add descriptions and notes to walkthroughs
- It also offers authors the flexibility to partially edit/modify content next to the element itself in an intuitive way in the flow of creation
- To segment users faster, Pendo has introduced nested segments, which allow clients to quickly add to the existing segments, thus eliminating the need to recreate segments from scratch
- It has recently developed cross-app walkthroughs to deliver contextual in-app assistance across various applications as part of its efforts to improve user experience and make it more seamless
- Pendo has one of the most extensive certifications for data security and compliance to protect customer-sensitive data, including CSA STAR - Level 1, GDPR, HIPAA, and SOC
- Pendo offers its clients the opportunity to gather detailed quantitative and qualitative feedback from its users through NPS surveys, various polls (such as open text, yes/no, number scale, and multiple choice), and a dedicated feedback portal
- In addition to assisting with web-based applications, Pendo has the capability to provide support for mobile applications that are native to iOS and Android platforms, including those developed using Xamarin and React Native
- Pendo offers an integration hub with third-party integrations with knowledge bases, live chats, and business intelligence tools for seamless data exchange and more detailed insights
- Referenced clients commended its improvements and user-driven roadmap. They appreciated its ease of deployment, customer and technical service, and flexibility and control of use for administrators

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Pendo (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall
●	◕	◕	◕	◕	◕	●	◑	◕	◕

Limitations

- Pendo's partnership ecosystem primarily consists of technology, marketplace, and integrations partners. It does not have a robust System Integrator (SIs) partnership ecosystem to support its implementations and training
- Its experience in serving clients deploying DAP on >10 applications is limited and its strategic support and consulting abilities, such as CoE support and value realization frameworks, are not yet fully developed. Hence, buyers looking for such support need to closely analyze its offerings
- Pendo's experience in supporting clients with industry-specific tools is relatively untested. Additionally, enterprises seeking to expedite their DAP initiatives on industry-specific or third-party software may not find its offerings to be appealing as its pre-built templates are currently limited
- Currently, it does not have a data validation feature available to ensure form-filling accuracy and adherence to company-specific policies. However, the provider has plans to incorporate this capability into its product in the future
- At present, the provider offers manual language translations for walkthroughs by allowing the import and export of XLIFF files. However, automatic translations are not available, which can be a time-consuming task for content creators
- Potential customers who require version control to manage changes effectively may want to thoroughly assess the provider, as Pendo does not provide built-in version control for content library and product. However, it offers a guide history, which has details such as the last modified date and time, walkthrough status at the time of the change, and the user who made the change
- Though Pendo is compliant with the WCAG 2.1 level AA, referenced clients would like to see more accessibility advancements, especially for screen readers. They also want the provider to offer more content styling options as well as consistency in UI across multiple apps and subscriptions in an enterprise
- Buyers also need mobile DAPs and integrations to work more easily, and they expect automatic notifications to be sent to administrators when a walkthrough stops working

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

WalkMe (page 1 of 2)
Everest Group assessment – Leader and Star Performer

Measure of capability: Low High

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

Strengths

- WalkMe leads the DAP market in terms of revenue, clients, and partners. It has proven expertise in supporting large deployments with its frameworks, thought leadership, and CoE capabilities
- It has a strong vision and roadmap and is continuously innovating to infuse AI and generative AI in DAP and make DAP an intelligent unified layer, for connecting, automating, and simplifying interactions across software systems and workflows
- It is one of the few providers that offers an extensive personalized user experience using segmentation based on user behavior and actions, attributes, or proficiency levels (first-time/active/returning after a long-time user)
- It offers Workstation, a centralized hub deployed on the desktop that simplifies information discovery, employee workflows, communication, and application usage for users. Furthermore, it brings an AI-powered enterprise search to collate resources from multiple places in one location
- WalkMe stands out in the DAP market by providing sophisticated automation capabilities. It offers ActionBot, a conversational interface that assists users in completing tasks automatically, and is actively working to improve this feature even further by integrating AI technology
- To simplify content creation and deployment, it offers an extensive library of pre-built templates, developed by its own team and partners, and WalkMe Share to facilitate creators' collaboration for content approval and management through seamless sharing of slideshows and videos
- Among the key differentiators are the product's advanced analytics and dashboarding capabilities, which are also highlighted by referenced clients. Among other things, it offers:
  - WalkMe Discovery, an enterprise-level dashboard that gives C-level executives visibility into the enterprise tech stack and the inefficiencies in software investment and adoption
  - UI Intelligence tool to understand users' interaction with applications. It identifies important elements in the UI of any web app and captures and aggregates data in a heat map
  - Digital Experience Analytics (DXA), session playbacks, and funnels to analyze a user's journey with WalkMe by capturing interactions such as clicks, inputs, and form submissions
  - Digital adoption projects dashboard to view the progress of digital adoption initiatives
- It has a focus on enterprise security and the most comprehensive set of certifications in the DAP space including SOC, GDPR, HIPAA, and ISO, and has recently been FedRAMP certified
- Enterprises looking to offer their employees a unified experience throughout their journeys across multiple applications on the web, mobile, and desktop will find WalkMe's product to be suitable
- WalkMe Shield, its automated testing solution, helps free up administration time by proactively identifying any changes in the underlying application and offering a bulk replacement mechanism
- Referenced clients have highlighted the product's ease of use for both administrators and end-users and its customer support as key areas of strength

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

WalkMe (page 2 of 2)
Everest Group assessment – Leader and Star Performer

Measure of capability: Low High

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

Limitations

- Buyers with <500 employees should conduct further due diligence on WalkMe as its focus and current clientele is primarily composed of enterprises above this size range
- While WalkMe has one of the most mature products available in the market, a few DAP clients have indicated that the pricing of the product is on the higher side and can be cost-prohibitive when scaling up the program, especially for cost-sensitive buyers. However, WalkMe is currently working on a revamped pricing and packaging strategy to address these concerns
- While the provider offers many out-of-the-box customization options, referenced clients have indicated that content creators need to have some understanding of HTML and CSS to customize content elements. WalkMe is currently making efforts to integrate generative AI technology in order to simplify the content creation process further
- It does not currently provide a feature that allows clients to give users a realistic experience using pre-loaded sample data and simulated scenarios. This capability is particularly useful for industries with strict regulations, as it allows clients to offer users a controlled environment to optimize processes and reduce risks before they are put into the actual software
- While WalkMe offers extensive training and certification courses, clients expect WalkMe to provide additional training specific to content creation in different complex environments
- While WalkMe has extensive pre-built templates to offer clients the ease and speed of content creation, it can further expand into bringing such templates for industry-specific applications

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Whatfix (page 1 of 2)
Everest Group assessment – Leader and Star Performer

Measure of capability: Low High

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

Strengths

- With a strong vision and product roadmap centered around AI and user experience, Whatfix has emerged as one of the fastest-growing DAP providers in the market in this PEAK assessment
- One of its key strengths is its suite of analytics offerings, which includes product analytics to track application utilization and user drop-off points, guidance analytics to gauge content engagement, and the recently launched Enterprise Insights to gain visibility into license utilization and adoption
- Whatfix has demonstrated expertise in serving clients on desktop applications such as Microsoft Teams, SAP, Oracle, and custom apps, as well as virtual desktop applications running on Citrix
- It is one of the few providers that offer extensive mobile capabilities, including in-app guidance and help, usage analytics, and custom surveys. Enterprises in industries such as manufacturing, retail, and logistics with deskless workers will particularly find these features appealing
- The provider offers robust content life cycle management to its clients with clearly defined stages for managing and publishing content and facilitating collaboration among authors/administrators
- Whatfix's deep enterprise search capability is one of its key strengths, which enables easy retrieval of the relevant information by users from the content aggregated across knowledge bases / LMSs
- It is one of the few providers who showcased credible PoCs by leveraging generative AI to augment its product capabilities such as the summarizing of answers to user queries and auto-completing of text fields
- The company has recently revamped its pricing and packaging model to enable better scalability and flexibility to enterprises and added more options to choose from as per their requirements
- Whatfix has a strong focus on internationalization with the ability to auto-translate content in a wide range of languages, serving the needs of global enterprises
- It offers pre-built templates for key applications such as Workday, SAP, and Salesforce for faster deployment. Enterprises in the P&C insurance sector looking to support their employees on Duck Creek or Guidewire software will particularly find its pre-built industry solutions to be attractive
- As a part of its GTM strategy, it has been heavily investing in expanding its partnership ecosystem and launched a new partner program called Rise 2 Excellence (R2E) to empower its partners and provide them with improved enablement options
- In addition to supporting SaaS deployments, Whatfix has provisions for on-premises and hybrid hosting options to give flexibility to its clients who might have corporate data privacy concerns
- Referenced clients have praised Whatfix's customer support and responsiveness. They spoke highly of its Digital Adoption Assistants (DAA) and its willingness to work together on a solution
- They have also highlighted the intuitiveness and ease of use of the product for end-users, easy content creation, pricing, and commitment to innovation as its key strengths

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Whatfix (page 2 of 2)

Everest Group assessment – Leader and Star Performer

Measure of capability: Low High

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

Limitations

- While appreciating Whatfix's ability to consistently deliver new and innovative features, some referenced clients have highlighted the need to maintain up-to-date product documentation and online support articles to reflect these recent functionalities
- Whatfix allows the automated bulk testing of walkthroughs to proactively identify any changes in the underlying application. However, there is potential to further enhance this capability by allowing bulk find and replace or editing of walkthroughs in case an element within an application undergoes a change and is present in multiple walkthroughs
- While the provider offers smart cohorts to intelligently segment users based on in-application behavior, referenced clients have suggested some room for improvement to easily segment and strategically deliver content to users
- Although Whatfix provides a wide range of features for desktop applications, it currently does not offer support for macOS, and this is still on its roadmap
- Referenced clients would like Whatfix to develop the ability to create courses or mini quizzes within task lists and provide more upfront disclosure of technical requirements during the onboarding process
- Although buyers appreciated the supportive role of Whatfix's DAAs in content creation, some have suggested the importance of simplifying advanced customizations to make them more codeless, thereby enabling clients to manage the content creation themselves

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

05

Enterprise sourcing considerations

- Major Contenders
  - AppLearn
  - AppNavi
  - Apty
  - HintEd
  - Improved Apps
  - Knowmore
  - Lemon Learning
  - MyGuide by Cornerstone
  - myMeta Software
  - Newired
  - SAP Enable Now
  - Stonly
  - Toonimo
  - tts GmbH
  - Userlane
  - Ziplyne

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- AppLearn has one of the most mature analytical capabilities in the DAP space. The provider offers core analytics to track its platform usage and advanced analytical capabilities to identify user adoption and support gaps before deploying in-application walkthroughs
- It offers an Objectives and Key Results (OKR) dashboard to track the different business-level KPIs in a single window and has recently brought in a business matrix dashboard that presents key business processes and their respective steps and helps identify areas for improvement
- The provider has a focus on enhancing its professional services offering to drive value for its clients and offers Hypercare, a package to support organizations through the entire deployment, go-live, and optimization of the Adopt platform
- AppLearn has recently launched a CoE setup and consulting capability to assist its clients in expanding their DAP implementations
- Its enhancements are aimed at making the DAP user-centric and for delivering personalized support. It has brought in a guidance switch to enable users to switch on or off automatic help. Additionally, it offers journeys as a collection of walkthroughs to ramp up the knowledge of users
- It is one of the few providers offering enterprise benchmarks comparing the median and best time taken to complete different steps in a business process and for calculating opportunity hours
- AppLearn has the ability to detect confused users in real time by analyzing their mouse and keyboard interactions. It can offer contextual support to users based on several factors such as experience, behavior deviation, department, and digital skills
- For flexibility in the mode of content delivery, it allows walkthroughs to be recorded and saved in a Word document and then exported to different file formats including PDF
- It offers conformity with the WCAG 2.1 AA standard. The user interface has been adjusted for people with disabilities, by ensuring compatibility with assistive technologies and by implementing features such as alternative text descriptions, keyboard navigation, and clear and concise language
- AppLearn has recently launched a certification program for administrators and analytics professionals, which is helpful in expanding the DAP community
- The provider has a well-established partner ecosystem for reselling, implementation, and technology, and its acquisition of YesElf has also contributed to its partner expansion
- Referenced clients have commended its customer support, promptness in responding to inquiries, and attentiveness to as well as implementation of client feedback. Additionally, the product's user-friendliness for end-users has been identified as a key strength

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- While AppLearn has a good presence in other geographies, it has the potential to further expand its portfolio in the Asia Pacific region to capture more market share
- Clients looking for support on desktop and native mobile applications might not find AppLearn's offerings to be suitable as AppLearn can currently support only PWA-based applications and Microsoft Teams on desktops and mobiles
- Its data is hosted in AWS and although customers have the option for their tenant to be hosted in the US or EU, enterprises with data regulation constraints might need to investigate its offerings further as it does not have a focus on offering on-premises and private cloud-hosting models
- At present, the provider does not offer authors the flexibility to edit/modify content and balloon options next to the element itself in an intuitive way in the flow of creation
- Although the provider has a focus to deliver knowledge to its users in the flow of work through its Adopt Split Screen module, it has out-of-the-box integration abilities only with ServiceNow currently. However, it can build custom integrations with other content repositories with APIs and is investing to bring in more out-of-the-box integrations
- AppLearn does not currently offer automatic translation capabilities, which can result in additional time being spent on creating content in multiple languages. This has also been identified as an area for improvement by clients
- While AppLearn has extensive pre-built templates to offer clients the ease and speed of content creation, it can further expand into bringing such templates for industry-specific applications
- Referenced clients have cited the need for easier configuration of content by offering an option to copy-paste content from testing to the production environment and increasing the number of attributes for better-targeted user support
- Although clients have found the analytics provided by AppLearn to be comprehensive, they would appreciate improved data extraction capabilities and more user-friendly dashboarding. These enhancements would aid in storytelling and enable clients to interpret the data more easily

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- One of AppNavi's key strengths is its focus on user behavior mining, which provides visibility into applications' usage and allows enterprises to rationalize their software portfolio
- AppNavi aims to ease the work for content creators by generating the best possible path taken by users to complete tasks within an application. The authors only need to verify the generated path's accuracy and make adjustments, if necessary, instead of recording the whole step-by-step process
- Its step recorder and in-place editing capability empowers authors to easily create interactive walkthroughs and tooltips across multiple pages and web-based applications. These can be segmented to target a specific audience and triggered based on user behavior and interaction with an element to offer personalized user support
- AppNavi has brought in a new dashboard for its clients that presents a consolidated view of user adoption across various applications. In case they have any custom reporting requirements, it also provides access to data in third-party tools such as PowerBI
- It provides a robust content life cycle management by offering its clients multiple environments to create and test walkthroughs before publishing them. It decentralizes the content creation process with its permission management capability, allowing different roles to contribute to the process
- The provider has a focus on making its walkthroughs more robust and reliable and is continuously investing to strengthen its element detection/selection algorithm to make element search more accurate
- AppNavi has introduced a customer-wide styling engine to bring consistency in the look and feel of DAP content across the organization. This engine empowers clients to easily define elements such as font style, size, and color, and ensure a unified visual experience across all applications
- As a part of its go-to-market strategy, AppNavi collaborates closely with its partners to demonstrate the advantages of digital adoption to its clients through business case examples and aligns with them to showcase how DAP can solve broader problems such as software asset management and employee experience
- It has also partnered with DeepL to support the automatic translation of content created within walkthroughs, tooltips, and announcements to about 29 languages
- Referenced buyers praised AppNavi for ease of use, customer service, and quick implementation
- Referenced buyers also noted a reduction in web-based training and change management costs and the faster adoption of new tools as some of the benefits realized after implementing AppNavi

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Most of AppNavi's clients are based in Continental Europe, especially Germany; hence, its experience in serving clients in other regions is relatively untested vis-à-vis its peers
- AppNavi primarily targets midsize and large enterprise clients, and hence, small businesses should assess its offerings accordingly before onboarding it as their DAP provider
- Enterprises on a lookout for a DAP for mobile- or desktop-based applications may not find its offering to be compelling as it currently only supports web-based and mobile-responsive applications
- While AppNavi is focused on providing comprehensive reporting and analytics dashboards, there is scope to further enhance the visualization options offered based on user behavior mining and track metrics such as empty clicks and inactivity periods, user searches, and industry benchmarks
- It offers training for administrators and content creators only in English and German, which may be a deterrent for clients seeking training for a more globally diverse workforce
- AppNavi currently does not offer the ability to rectify elements/issues simultaneously across multiple walkthroughs in case any element within an application undergoes a change. Users must manually update each walkthrough, which can be a time-consuming process
- It does not have the ability to provide cross-application analytics. Clients looking to understand how users engage with the business processes that involve more than one application and identify their areas of friction might need to investigate AppNavi's capabilities further
- Even though the provider undertakes rigorous security assessments and is GDPR compliant, securing certifications for data protection and compliance such as SOC2 Type 2 could further enhance its value proposition
- Referenced clients expect AppNavi to further simplify the process of creating walkthroughs and enhance its overall dashboarding and analytics capabilities

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Apty is one of the few providers with an enterprise-focused approach that envisions to improve business process engagement by increasing compliance and scaling adoption through its product
- The provider aims to offer its clients a best practice approach to enable, enforce, and accelerate the adoption of enterprise software and improve business impact. It is bringing in its Aptymize methodology, which is a structured program for successful enterprise deployments
- In line with its aim to improve compliance, Apty enables buyers to establish monitoring objectives through its activity tracking feature within AptyStudio, to track team performance and schedule and send reminder messages if the teams fall behind
- The platform's sophisticated analytics assist customers in tracking user activities and help to process bottlenecks prior to implementing walkthroughs. Furthermore, it includes a goal dashboard that offers buyers internal benchmarks for evaluating users' performance on a specific process
- Apty has recently brought in content versioning to enhance, update, or customize content without affecting the live content. This helps users to backtrack and rectify content mistakes by selecting any version from the log of content versions intact
- It has recently started offering an out-of-the-box capability to auto-translate content using a third-party translator such as Google and Bing and can support various languages that the browser supports
- The provider has introduced a new feature that enables authors to save time by duplicating themes and repurposing notifications. Additionally, the product meets the standards of WCAG and ADA, thereby ensuring accessibility for all users
- One of its key strengths is the ability to offer SaaS, on-premises, and hybrid hosting options. Its capability to leverage hosting servers in Europe, the US, or Australia and provide options for maximum data protection makes Apty attractive for clients looking for a flexible DAP provider
- Apty provides pre-built integrations with platforms such as Confluence, Zendesk, ServiceNow, JIRA, Confluence, and Sharepoint along with its recently launched bookmarking capabilities. This feature is beneficial for clients as it centralizes all resources in one location for easier access
- It offers the ability to automatically execute walkthroughs, perform user actions using API, and pre-fill text fields/forms within walkthroughs, thus reducing the manual effort required from the users
- Referenced clients have appreciated Apty's ease of use in terms of content creation, willingness to partner with clients, and customer support as some of its key strengths
- Clients also lauded Apty's ability to export content in different media – PDF, PPT, video, and SCORM modules, which has helped its clients to save time while creating content

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Apty's presence in Europe is relatively limited and hence buyers looking for a DAP in this region should first do their due diligence
- Its experience in serving clients deploying DAP on >10 applications is not proven and hence buyers looking for an enterprise-wide DAP implementation should accordingly analyze its offerings
- While Apty currently supports walkthroughs on mobile and tablet for browser-based web applications, it does not offer support on native mobile/tablet- and desktop-based applications support (except on top of desktop-based Microsoft tools). However, this is on the roadmap
- While Apty has started offering pre-built templates on Salesforce, Workday, Oracle, and ServiceNow to offer clients the ease and speed of content creation, it can further expand into bringing such templates for other applications
- Apty is unable to recommend the best-fit walkthroughs in real time based on user confusion or behavior at the point of their need, which would have been helpful for better-targeted support for its users. However, Apty can identify user friction and send alerts or notifications later to help them
- While Apty has recently started offering built-in version control for content, buyers looking for built-in version control for the product to handle changes better should ensure further due diligence of Apty as it does not currently offer this capability
- Clients highlighted further scope to fully test the product updates before rolling them out to ensure reliability and avoid glitches
- Buyers looking to compare usage analytics across applications on the same dashboard should run further due diligence on Apty as the provider does not currently offer this
- Apty does not have a provision for an Enterprise License Agreement (ELA) where users can access an unlimited number of applications at a fixed price. This might be cost-prohibitive while scaling up as the number of applications increases; this has been also pointed out by clients
- Referenced clients expect Apty to bring in a visual flowchart of the content created, which would be helpful, especially in complex branched walkthroughs for simplifying navigation for authors and enhancing the content creator experience

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

HintEd (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- HintEd aims to make digital adoption easier and more effective, boost team performance, and enable enterprises to make the most out of their software investments. It is one of the few providers capable of providing DAP support in the LATAM region
- It offers hosting and deployment flexibility to its clients by offering them cloud, hybrid (on-premises and cloud), and full on-premises hosting options. It supports deployments on multiple cloud platforms such as Digital Ocean, AWS, Azure, and GCP
- HintEd has the capability to assist users across various web browsers such as Chrome, Opera, Firefox, IE 10+, and Yandex Browser. Furthermore, it can also provide support to users on Windows applications (compatible with Windows 7+) as well as PWA-based mobile applications. To enhance the usability of the product, it has recently started supporting multi-level iframes
- It offers simulations called smart manuals as a separate product, which is a set of interactive screenshots explaining a process compiled in the form of PDF or video that can be easily shared. Buyers looking to train users before they are put into the production environment will find this tool to be helpful
- The provider has made improvements to offer more precise step configuration with features such as autofill options, more element positions, multiple element selection, and link embedding, to offer better flexibility to authors while creating content
- HintEd has recently started offering the ability to automatically execute walkthroughs to reduce the number of clicks by the users and the ability to pre-fill text fields / forms within walkthroughs. This will be helpful to save users' time while executing tasks
- HintEd offers the ability to create automatic triggers via the walkthroughs editor to provide help to users in case they have triggered an event (such as clicking, hovering, inactivity periods, or scrolling on an element). The provider offers options to choose from multiple trigger events, which allows for the creation of contextual conditions for walkthroughs
- In order to offer a seamless experience to its users, HintEd has also recently started offering the possibility to resume a walkthrough from a previously accessed point
- Referenced clients have appreciated the ease of integration of the platform, its technical support and speedy issue resolution, as well as its responsiveness

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

HintEd (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- HintEd's client base is skewed toward the Continental Europe and LATAM regions. Buyers looking for a DAP outside this region should do their due diligence as it has a relatively limited presence in other geographies such as North America, the UK, and Asia Pacific as compared to its peers
- The provider's experience in serving clients deploying DAP on >10 applications is limited and hence buyers looking for an enterprise-wide DAP implementation might want to closely analyze its offerings
- Buyers with stringent data privacy and compliance policies might want to carefully evaluate HintEd, as although it has enterprise-grade security and is GDPR compliant, it does not have data security and compliance certifications such as ISO and SOC2. It is currently on their roadmap
- HintEd does not offer visibility into user adoption of the underlying software and user friction before deploying the walkthroughs (through metrics such as process completion rate, time taken, and user error rates). Buyers looking for such capabilities can do further due diligence on its offerings
- HintEd does not offer automatic translation capabilities and has no integrations with third-party platforms such as Google Translate, which might lead to additional work for authors while creating multilingual content for a global workforce. However, this is part of its product roadmap
- It does not offer 24x7 product support and an embedded product help tool for administrators or content creators, which might make the solution less appealing for some clients
- Enterprises looking for a product with accessibility features to enable individuals with disabilities to use the product effectively may not find HintEd's offering to be appealing as the product does not offer features such as screen readers or color contrasts
- It currently does not offer in-application guidance and support on mobile-based applications, which might be a limitation for some buyers
- Referenced clients would like HintEd to be more agile and make all its functionalities available for trial for a limited time period to empower its clients to decide better on the features that they need
- Clients expect HintEd to improve its element detection to identify the walkthroughs that are not working due to element changes and have cited the need to have better reporting and analytics

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Improved Apps (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Improved Apps specializes in providing in-app support for Salesforce applications, with the aim to drive user engagement and adoption while reducing the time spent searching for content
- One of its key differentiators is its ability to natively integrate with Salesforce which uses Metadata API, instead of browser extensions, to offer guidance and support in these applications. This was highlighted as a key strength by its referenced clients as well
- It offers two different products to its clients – Improved Help, which provides authoring tools to embed help and training in any application and Improved Noticeboard, which delivers announcements and communications to users
- The provider recently launched its Improved Usage Tracker, which provides insights and analytics on how users engage with underlying applications and allows for the monitoring of usage by role, profile, location, and department
- Apart from providing support on web-/browser-based applications, Improved Apps can also support native Salesforce and custom mobile applications. It has brought in the ability to guide users through different web pages within the Salesforce app by using multi-page walkthroughs
- It also provides AI-enabled search and embeds links to keywords within help topics, further enhancing the accessibility and usefulness of the content
- The provider has invested in developing robust knowledge management capabilities that allow integrations with enterprise knowledge bases or LMSs. This enables users to discover content in context without having to leave the application, thereby leading to better engagement and productivity
- Improved Apps has a unique way of delivering content to the users in the form of slideshows where users can navigate the content in the flow of work in the Salesforce environment
- It also introduced a new designer functionality that provides flexibility to its clients to add multiple pieces of content such as videos, audio, and documents to the guidance, making it more interactive and engaging
- It provides in-app surveys to capture user feedback and sentiments, multiple environments to create and test walkthroughs before publishing them, and built-in version control of the walkthroughs and the product itself to help its clients handle changes better
- Referenced clients have highlighted the ease of use of the product and the ability to quickly implement it as Improved Apps' key strength areas

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Improved Apps (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Improved Apps continues to primarily focus on North America and the UK, and has limited presence in the Continental Europe, APAC, and MEA regions. Its clientele is also currently skewed toward BFSI, manufacturing, and professional services
- While it has extensive experience in enabling the adoption of Salesforce and custom applications, it has limited proof points to showcase its capabilities in other applications such as Workday and SAP
- Clients looking to deploy Improved Apps need to have at least one Salesforce license. Currently, the provider cannot support hosting on other cloud platforms such as AWS and Microsoft Azure, which might be a drawback for some buyers
- Enterprises looking for a DAP with a pre-filling capability for form fields or branched walkthroughs might find the product to be less appealing as it currently does not offer these features
- Improved Apps currently supports only manual language translations of the created walkthroughs and not automatic translations, which might make it time-consuming for the content creators
- The overall guidance functionality is sophisticated and can support multi-page walkthroughs within the same application; however, it currently does not offer cross-application functionality, which helps users complete a process that spans multiple applications
- Enterprises looking for advanced analytics to track metrics such as empty clicks and inactivity periods and out-of-the-box organization-level KPIs to track enterprise-wide digital adoption initiatives might also want to closely analyze the provider's capabilities
- Currently, it does not have the ability to identify if the user left a walkthrough in between and then start the walkthrough from the next step when opened again, instead of starting from the first step
- Enterprises looking for out-of-the-box, pre-built walkthroughs for key non-Salesforce enterprise applications such as Workday, SAP, and Oracle might want to carefully evaluate Improved Apps as it currently does not have a focus on developing this capability
- While the provider is GDPR compliant, it is currently not compliant with other major security standards such as ISO 27001, SOC2 Type 2, and FedRAMP

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Knowmore (page 1 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability: Low High

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

Strengths

- Knowmore supports enterprises in placing users at the center of their digital transformation initiatives through its three products – K-Now, which offers in-application guidance; K-Studio, an e-learning authoring tool; and K-Value, which provides analytics to measure application usage
- Knowmore's strength lies in its ability to help users to initiate guidance from various sources, such as chatbot, email, or LMS. In addition, it can support cross-application walkthroughs, thereby enabling users to navigate through processes that extend across multiple applications
- It has further enhanced its UI/UX and introduced a plethora of customization options for clients to embed multi-media formats, such as text, pictures, and videos, in the DAP content
- The provider has invested heavily in enhancing the robustness of walkthroughs by offering multiple levels of content validity checks, such as a dashboard to display failed posts and broken content in case of a version upgrade, color-coded check marks, and an advanced rules controller to help authors understand the reasons for content not showing up correctly for end-users
- Knowmore's commitment to accessibility is evident through its various disability-friendly features, such as DAP content that adapts to different font sizes, full compatibility with screen readers, support for keyboard navigation, and the provision of diverse colors and contrast levels. It is also RGAA-compliant, which is a recognized web accessibility certification standard in France
- Knowmore's in-place analytics capability is unique in the market, which allows enterprises to visualize all the key metrics related to the webpage, such as screen visits, visit duration, and user profile distribution, side-by-side within the application itself
- Another strength for Knowmore is its ability to offer flexibility in deployment options to its clients, which includes on-premises, private cloud, and hybrid hosting options, in addition to supporting SaaS deployments
- It is one of the few providers offering comprehensive survey capabilities, which includes capturing of user feedback for application guidance, creating general surveys, integrating with third-party survey platforms, and analyzing the data collected through the survey dashboards
- K-Studio provides users with interactive simulations that replicate the application screen, allowing them to practice using the application in a safe and realistic environment
- Referenced clients have lauded Knowmore's ease of use, pricing model, customer-centric approach, and agility in attending to enhancement requests
- Clients cited a reduction in support tickets and user errors, seamless onboarding of new employees, and training of the existing ones as key benefits realized after implementing Knowmore

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Knowmore (page 2 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability: Low High

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

Limitations

- Knowmore's primary focus on serving clients in Continental Europe might make the product less appealing for enterprises based out of other regions such as North America, the UK, and APAC
- Its current portfolio is heavily skewed toward serving enterprises for their employee-facing use cases. Hence, its ability to support buyers that are looking to leverage the product for their customer-facing applications is relatively untested
- While the provider can offer in-app guidance on web-based applications, it currently cannot support desktop- and native mobile-/tablet-based applications
- There is scope to further enhance its analytics and reporting capabilities by offering user behavior data based on metrics such as task completion rates, empty clicks and inactivity periods, user search results, and organization-level OKRs and KPIs before deploying the walkthroughs
- Enterprises looking for version control to handle changes better might want to closely evaluate the provider as it does not offer built-in version control for the content library or the product
- Knowmore offers training for administrators and content creators in three languages – French, English, and Spanish – which may be a deterrent for clients seeking training for a more globally diverse workforce. Knowmore conducts the training itself and does not offer any certification programs
- Even though the provider undertakes rigorous security assessments and is GDPR compliant, securing certifications for data protection and compliance such as ISO 27001 and SOC2 Type 2 could further increase its value proposition
- Enterprises looking for 24x7 product support should closely evaluate the product as the provider currently offers support only during the French working days and hours
- Referenced clients would like Knowmore to bring in more capabilities by leveraging next-generation technologies such as AI
- They would also like the provider to improve the reliability of its analytics, share best practices with customers, and strengthen its partnership ecosystem in order to expand its global reach and provide services internationally

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Lemon Learning (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Lemon Learning aims to enable training, engagement, and communication through its three products – Lemon Adoption, Lemon Analyze, and Lemon Automation. It has a good brand recall in France and the majority of its clientele is based out of this region
- The provider has recently introduced Lemon Analyze, an advanced analytics tool that enables organizations to optimize costs and training and streamline processes to save time by understanding software usage rates
- Lemon Learning provides usage analytics to monitor interactions with various content types such as walkthroughs, notifications, and tooltips. It also allows users to extract data for specific date ranges and offers multiple drill-down options such as geographies, users, and types of content
- The platform provides push notifications that enable users to share updates or news and allows them to embed images, GIFs, videos, or questionnaires from form tools such as SurveyMonkey, Google Forms, and Microsoft Teams. Additionally, administrators have the flexibility to schedule a time period for the push notifications to be sent
- It offers authors the ability to edit/modify content and balloon options next to the element itself, in an intuitive way during the flow of creation
- It provides administrators with various segmentation logics to deliver targeted walkthroughs to different user groups. It offers customizable pop-ups, push notifications, and tooltips to facilitate effective change management and enable higher user engagement with the applications
- The product offers the ability to create branched walkthroughs based on a set of conditions to ensure that the user has access to the content that is most relevant to their interaction within the page. A flowchart view of the walkthroughs is also available for authors to aid with visualization
- The provider brings in data validation capabilities to offer better accuracy of the user data captured while filling forms and fields as part of various processes
- Lemon Learning holds ISO 27001/2 certifications and complies with GDPR regulations, thereby ensuring the protection of customer-sensitive data and offering a secure product
- Lemon Learning provides pre-built templates designed for key applications such as G Suite, Salesforce, MS Office 365, Oracle, and SAP, to enhance the speed of content creation and ease of deployment

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Lemon Learning (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Lemon Learning's support is limited to web-based and mobile-responsive applications. Buyers looking for support on desktop- and native mobile-based applications might find the product to be less appealing
- Buyers located outside of Continental Europe should conduct a thorough evaluation of the provider's offerings, as it lacks experience in serving clients from the UK, North America, and Asia Pacific compared to its peers
- Organizations that need significant assistance in expanding their DAP implementations may not be drawn to Lemon Learning. Its strategic support and consulting abilities, such as CoE support and value realization frameworks, are relatively limited
- At present, the provider's partner ecosystem has limited reach and capabilities. Companies seeking to deploy a DAP through their SIs may not have access to Lemon Learning
- Lemon Learning does not provide a step recorder feature that allows content creators to execute the workflow in one go and create an outline of the walkthrough steps
- While Lemon Learning has brought in analytics to understand the number of users interacting with the underlying software, it does not offer user behavior (including empty clicks and inactivity periods), task completion rates, and organization-level OKRs and KPIs. Before deploying its walkthroughs, organizations should thoroughly assess the provider's capabilities
- The provider does not offer certification programs for content creators, administrators, partners, or the general public, who are valuable for expanding the DAP community
- Enterprises with data regulation constraints and/or flexible hosting options may perceive the provider's offering as less appealing since it does not support on-premises and private cloud-hosting models
- Organizations that are forward-thinking and are exploring DAP providers that offer advanced AI capabilities, such as generative AI, may not find Lemon Learning to be a suitable option due to its limited capabilities

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

MyGuide by Cornerstone (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- MyGuide is a suitable option for buyers seeking to enhance their L&D initiatives. By integrating with Cornerstone's wider capabilities, it can deliver personalized talent and better learning experiences
- MyGuide's rule-based chatbot interface is a valuable asset, as it allows users to input data and easily initiate automated walkthroughs (e.g., create a lead in Salesforce)
- MyGuide offers a variety of exclusive survey features, including options for multiple choice, single choice, numeric rating, and star rating. Additionally, MyGuide allows for feedback to be submitted via email, allowing administrators to receive and route queries to the appropriate team
- The platform utilizes Azure APIs to automatically translate content into over 40 languages. Moreover, it provides front-end language translations for administrators, authors, and end-users in various languages such as French, Japanese, and Korean
- It has invested in its Guide Test Automation and Find and Replace functionalities. MyGuide now offers an automated process where the administrator can automate the maintenance of the walkthroughs, and update the text, rules, or elements in guides individually or in bulk
- MyGuide has upgraded its export features for its insights, now allowing for a wider range of data to be exported, including content types. Additionally, administrators can now filter by time range and select multiple applications for bulk export
- MyGuide has achieved certifications for its data security and privacy capabilities, including the ISO 27018, SOC 1 (Type II), SOC 2 (Type II), and SOC 3 certifications. It has also implemented GDPR compliance and undergoes regular audits to ensure continued adherence
- The Power Form feature offered by MyGuide aids users in filling out forms and validating data. This can be utilized by enterprises to gather and validate information in a structured manner
- MyGuide has a comprehensive set of analytics for the created content. Enterprises can understand insights such as engagement with the content, drop-off points, and user searches
- Its application analytics enables organizations to compare the time spent on different pages and identify the top user workflows within an application
- The company has improved its branching capabilities by allowing the merging of multiple branches and linking multiple walkthroughs to a single one. Additionally, users can now visualize the various branches within a walkthrough
- One of MyGuide's main advantages is its ability to assist users on desktop applications through its unique element detection technology, which utilizes computer vision
- Clients have stated their satisfaction with the customer service, various content delivery formats, and MyGuide's willingness to incorporate client feedback to enhance the solution

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

MyGuide by Cornerstone (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Companies with operations outside of North America and Asia Pacific may want to consider MyGuide's offerings with caution, as the provider's market presence is currently limited. However, following the acquisition by Cornerstone, this could potentially change
- The provider's current focus is mainly on providing services to enterprises for internal use by employees. It does not have much experience in supporting buyers for customer-facing applications
- MyGuide provides training and support exclusively through its own resources. Enterprises seeking assistance from their IT services partners for DAP training should consider MyGuide's availability. Nonetheless, MyGuide is developing a partner certification program and plans to leverage Cornerstone's partner ecosystem
- Although MyGuide provides content creators with a useful visualization feature for viewing the steps of a walkthrough, it currently lacks a step recorder that allows creators to perform the workflow in a single go to generate an outline of the walkthrough that can be subsequently edited
- There is scope to improve the overall breadth of analytics capabilities with enterprise dashboards to compare analytics across different applications or processes
- At this time, MyGuide may not be the best fit for companies seeking hyper-personalized assistance for their users, including features such as an automatic suggestion of walkthroughs and help content based on their level of confusion or inactivity
- Organizations seeking to expedite their DAP initiatives on specialized third-party software and industry-specific software may not find MyGuide's offering to be appealing due to the restricted availability of pre-designed templates, ISV partnerships, and marketplace listings
- MyGuide can enhance its solutioning approach to provide a more consultative experience for clients with intricate needs, as well as those seeking CoE assistance and support in expanding DAP initiatives
- Organizations seeking project-based or goal-oriented dashboards to monitor progress and take corrective actions may not find MyGuide to be a suitable solution due to its limited capabilities in this regard
- Clients who are familiar with the enhancements being made to MyGuide's insights capabilities anticipate a more effortless and staggered experience and desire more detailed insights on user engagement

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

myMeta Software (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- myMeta Software adopts a user-centric approach to digital adoption by providing application guidance and tailored experience to assist and support users throughout digital processes
- Although a relatively new entrant in the market, myMeta has a focused global expansion strategy and an innovative product roadmap. It is also investing heavily to expand its partnership ecosystem with SIs and ISVs to increase its outreach and capabilities
- It provides contextual help to users using interactive walkthroughs, tooltips called hints, checklists, and help widgets. The product also supports cross-application functionality, wherein the same walkthrough can jump across more than one application
- Its Build module is a key differentiator, which can redesign the graphical interface of any web application using a low-code development framework. It can enhance the logic of the platform by modifying its workflow, simplifying the UI/UX, changing navigation, automating data entry, and checking data quality through validation. This has also been lauded by its referenced clients
- The product offers the ability to create branched walkthroughs based on a set of conditions to ensure that the users have access to the content that is most relevant to their interaction within the page. A flowchart view of the configured guides is also available for content creators to aid with visualization
- myMeta leverages AI to offer proactive assistance to end-users, enable intelligent data retrieval from enterprise documentation, and build adaptive interface design
- It is one of the few DAP providers who showcased credible PoCs of using generative AI to augment its product capabilities such as conversationally interacting with the end user and aiding authors in creating new platform features and guides based on a natural language prompt
- For ease and speed of content creation, myMeta has a step recording functionality that enables content creators to execute the workflow in one go and then edit the walkthrough steps
- In addition to supporting Software-as-a-Service (SaaS) deployments, the provider has made provisions for on-premises and hybrid hosting options. This gives flexibility to its customers who might have corporate data privacy concerns and choose to avoid dependency on outside servers
- myMeta offers flexible commercial models to its clients, based on the number of business applications/domains. Its fair and transparent approach to pricing has been praised by referenced buyers as well
- Referenced buyers also appreciated myMeta for its professionalism and for showing agility in improving the product based on their suggestions

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

myMeta Software (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- myMeta's client portfolio is heavily skewed toward Continental Europe with limited presence in other geographies such as North America, the UK, and APAC. However, it recently opened its subsidiary in Japan and has plans to invest in expanding its footprint globally
- Currently, myMeta has not developed the ability to roll out surveys to collect user feedback within its application. However, this seems to be on the roadmap
- While myMeta offers basic analytics and out-of-the-box reporting functionalities, there is scope to further enhance its core analytics to make it more relevant for business users. This was also highlighted by referenced clients, who would like myMeta to make recommendations to optimize the process by reducing the number of steps or increasing the usage of any functionality
- It does not offer pre-built integrations with knowledge bases such as LMS and Zendesk, which may be a drawback for clients aiming to bring in all the resources at one point to the end-users
- Though myMeta is GDPR compliant, it can further enhance the security and governance of the platform by obtaining certifications such as ISO 27001 and SOC2, which are on its roadmap
- myMeta's support is limited to web-based and mobile-responsive applications. Buyers looking for support on desktop- and native mobile-based applications might find the product to be less appealing
- Enterprises looking for continuous product support might find the solution to be less appealing as they do not have 24/7 product support and there is no embedded product help tool for administrators / content creators
- The training is self-offered by myMeta and is available only in Italian and English language, which may be a drawback for clients seeking training for a more globally diverse workforce
- The ability to auto-test walkthroughs for any changes in the underlying application is currently on its roadmap. Referenced clients would also want myMeta to develop real-time notification capabilities for administrators and authors to report errors in guidance being used by end-users
- Referenced clients highlighted the scope to simplify the administrator module as an area of improvement for myMeta

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Newired's strong focus on security and privacy is one of its key differentiators and makes its offerings suitable for enterprises in the healthcare, pharma, financial services, and public sector verticals
- One of its key strengths is the ability to offer SaaS, on-premises, and hybrid hosting options. Its capability to leverage hosting servers either in Europe or the US and provide options for maximum data protection makes its offerings attractive for clients looking for a flexible DAP provider
- Newired has demonstrated expertise in serving clients on custom applications built within the organization. Its pre-built packages for different types of applications and industries (e.g., ERP, CRM, E-banking, and public sector) enable quicker rollouts of DAP initiatives
- The provider has a focused partnership strategy with regional SIs and OEMs in Continental Europe to enhance its reach and implementation capabilities. It also offers training and support in English, major European languages, and Chinese
- Newired is one of the few providers that has developed a personal tracking and activity feed, which provides visibility into every action a particular user has performed within the Newired overlay
- Newired's recent enhancements have provided more control and flexibility to the end-users. Users can choose their preferred experience with Newired based on their proficiency levels. Advanced users can use the journey slideshow feature that allows them to check instructions without interactive guidance
- It is compliant with WCAG standard. The end-user interface has been adjusted for people with disabilities with keyboard navigation for Newired content and screen reader adjustments
- Newired has built stronger integration with enterprise identity management systems and improved its support for Single Sign On (SSO). This helps enforce certain step transitions and enables the tracking of users' progress
- The provider has been strengthening its segmentation and personalization capabilities. In addition to a wide range of visibility rules for walkthroughs, administrators can create reusable segments that can be applied to walkthroughs and for segment-level analytics
- It provides detailed workflow and content analytics. Enterprises can understand analytics related to usage, walkthrough steps, time spent, drop-offs, completion rates, and trends across timelines
- Enterprises looking to support their employees on electron framework-based desktop applications such as Slack will find Newired's offering to be suitable. Another strength of Newired is its ability to auto-update the editor module with every release, taking away the effort from administrators
- Referenced buyers have appreciated the ease of use, pricing model, ability to support multiple languages, and flexibility of the platform to enable the reuse of content across different instances

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Newired has the potential to enhance its partner ecosystem beyond Continental Europe. The partner program could benefit from the implementation of tiering and improved enablement options
- Newired does not have the ability to start a walkthrough from any step or from the same step when a user returns to the application. Auto-starting or suggesting walkthroughs based on user confusion is not available. However, Newired is actively investing in bringing in these capabilities
- At present, Newired offers the auto-testing of generated walkthroughs as a service. Enterprises seeking pre-built auto-testing functionalities will need to await upcoming product launches
- Currently, Newired does not offer analytics and dashboards to track usage and actions on underlying applications or processes and identify friction points prior to implementing walkthroughs. However, this feature is planned for future releases
- Enterprises with multiple Newired deployments will not have the ability to compare analytics across the deployments within the same dashboard. It does not offer pre-built dashboards to set and understand progress on various goals and KPIs (completion rate, adoption rate, etc.)
- Although Newired offers a strong customer success services program to assist with implementation, content development, design, and training, its ability to provide guidance and support to organizations in strategy, expansion, and the CoE setup is limited
- Newired offers support for mobile-responsive web apps, but not for native mobile applications. Additionally, there is potential to expand support beyond electron framework-based desktop applications
- Newired's automation capabilities are currently limited to the pre-filling of text fields via step actions. It does not support the automatic execution of walkthrough steps
- Newired does not provide industry benchmarks or organization-wide benchmarks on metrics such as error rate, time taken, and completion rates
- Although Newired's technical capabilities have been appreciated by referenced buyers, they suggest that there is room for improvement in terms of enhancing the attractiveness of the user interface

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

SAP Enable Now (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- SAP Enable Now aims to boost user adoption and productivity by making in-application assistance and enablement content available to the users in the flow of work
- The ability of the product to natively integrate with SAP applications, such as S/4HANA, SuccessFactors, Ariba, and Concur, gives it a unique advantage in the market. The provider is further expanding its capabilities to support non-SAP applications as well
- SAP Companion is the embedded in-application guidance layer of SAP Enable Now, that delivers learning and assistance to the users. In addition to guided tours, it also offers contextualized help widgets, tutorials, announcements, and links to provide resources to its users
- Machine translation of in-application help and e-learning content directly on-screen with a click of a button is its major differentiator. Enterprises with multi-country operations requiring local language support can leverage the product's recent integration with SAP Translation Hub to expedite content distribution globally without any manual effort
- The provider simplifies content creation by providing a step recorder where content creators can execute the workflow in one go to create an outline of steps and then edit them, as required
- To ensure consistency in DAP content, it adopts a template-based approach where each formatting or standardized e-learning setting can be saved and consistently applied
- From a single recording of the workflow, SAP Enable Now can automatically generate a variety of content formats, such as product documentation, interactive software tutorials, presentation modes, and test scripts. This flexibility in content delivery has also been lauded by its clients
- The provider offers a robust content life cycle management process that facilitates collaboration among multiple users and a permission management capability that allows its clients to define responsibility for content creation, testing, and publishing across different stages
- It also provides project overview reporting for various tasks in content creation, ensuring adherence to planned timelines and identifying specific task statuses by project managers
- SAP Enable Now tracks key metrics such as guided tour playbacks and drop-outs, engaged unique users, content usage, and user progress. In case its clients have any custom reporting requirements, it allows data export to Microsoft Excel or third-party tools such as PowerBI
- The provider offers hosting and deployment flexibility to its clients and can support both on-premises and public/private cloud hosting
- Referenced clients have highlighted its easy publication process, language translation capabilities, user-friendly interface, and supportive and knowledgeable technical team as its key strengths

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

SAP Enable Now (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Though SAP Enable Now is moving in the right direction in terms of adding new features to enhance the overall user experience, it currently does not have the ability to offer a checklist or task list to its users
- Currently, SAP Enable Now can provide support to users only on the page they are on. It does not provide an option for branched walkthroughs or support cross-application walkthroughs, which can help users to complete a process spanning multiple applications
- The provider does not offer product analytics for enterprises to track application utilization and recognize the drop-offs, before or without creating any DAP content
- The provider can support applications across the web and desktop; however, the ability to support applications on native mobile/tablets is still on its roadmap
- The provider is yet to develop the capability to offer auto-testing of walkthroughs to save the administrator's time in testing and maintaining them
- Currently, the ability to create logic to segment users based on roles, departments, and locations is on its roadmap. This might make the solution less appealing for enterprises looking to deliver targeted content to specific user groups for a better experience
- Enterprises looking for a DAP with the ability to automatically execute walkthroughs to reduce the number of clicks by the users or the ability to pre-fill text fields/forms within walkthroughs might want to carefully evaluate SAP Enable Now as it does not offer such automation
- The product does not have pre-built integrations with knowledge bases such as LMS, Zendesk, and SharePoint, which was highlighted as a potential area of improvement by referenced clients
- While the clients expressed their satisfaction with its desktop capabilities on Windows, they would like the provider to extend support to MacBook as well
- Referenced buyers also cited the need to clearly define the technical and consulting services offered to avoid confusion and ensure better support and experience for clients

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Stonly (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Stonly's major focus on serving external-facing use cases makes it a good fit for enterprises seeking a DAP for their customer-facing products that can create a seamless user-onboarding experience for their clients
- In addition to walkthroughs, Stonly also offers other key features such as checklists, tooltips, in-app surveys, pop-ups, banners, and a self-help widget
- One of its key differentiators is its user targeting and segmentation abilities, which not only allows for easy content targeting based on user data but also UI-based segmentation, which uses data from the application's webpage to contextualize content for users based on actions, such as clicking on a tooltip or pop-up
- The provider also offers the unique ability to expand or contract element selection/detection to help authors accurately select elements during content creation. In case an element is missing, it allows content authors to specify the next desired action or behavior to avoid user confusion
- It supports the conditional branching of walkthroughs to give users access to the most relevant content according to their page interactions. It also provides a cross-application functionality wherein the same walkthrough can be used across multiple applications
- In addition to its native reporting capabilities, Stonly creates custom reports for its clients to track key metrics such as the current adoption of the application and knowledge base, user search results, time spent on each page, active users per application, and NPS results
- The provider showcased credible proof points of its robust knowledge management capabilities. Its built-in knowledge base can seamlessly embed within third-party websites or knowledge bases
- Stonly follows strict data privacy policies, is GDPR compliant, and has SOC2 Type 2 and HIPAA certifications to protect customer-sensitive information
- Enterprises looking for in-app guidance across web, desktop, and mobile/tablet platforms will find Stonly's offering to be attractive as the product is available as a browser extension on Google Chrome and Microsoft Edge as well as for desktop apps built on Electron. It also provides Software Development Kits (SDKs) to support guides on native mobile applications
- Stonly can offer flexible pricing models tailored to the client's specific requirements. Licenses can be charged on a per-user basis or depending on the number of guide views/interactions
- Referenced buyers have lauded Stonly for its ease of use, UI/UX and intuitiveness of software, ability to reuse content, and its customization options

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Stonly (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Stonly primarily focuses on North America and Continental Europe with limited presence in other key geographies. Also, a majority of its clientele consists of small and midsize enterprises with <5,000 employees, and its ability to serve large enterprises is relatively less tested
- Enterprises seeking flexible deployment and hosting models may need to evaluate Stonly's capability carefully as it only supports the public cloud-based option and does not offer private cloud and on-premises models yet
- Stonly's primary focus is on custom-built applications; hence, it does not offer pre-built templates to its clients for faster deployment of the product on commonly used, underlying applications
- The provider currently does not offer a step recorder where content creators can execute the workflow in one go and create an outline of the walkthrough steps
- While it offers search functionality to users, the search results are restricted to the titles of walkthroughs. This has also been pointed out by some of its referenced clients who highlighted that a few keywords do not yield the desired results
- Currently, the provider does not have an extensive ecosystem of partners. Also, it does not provide 24*7 product support, which might make the solution less appealing for some of the clients
- Though Stonly offers decision tree guides to its users to leap to different steps in a walkthrough, the ability to automatically identify if the user left a walkthrough in between and then take the user to the next step when opened again is still on its roadmap
- The company provides only online training programs in English, French, and Spanish. It does not provide classroom training programs to content creators and administrators. The sessions conducted are only for learning purposes and no certification is offered after program completion
- Referenced clients mentioned in-depth analytics capabilities, permission management, segmentation and targeting, and user behavior tracking as key areas of improvement for Stonly
- Referenced clients would also like Stonly to improve its integration capabilities with off-the-shelf ticketing systems such as Zendesk as well as home-grown ticketing systems

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Toonimo (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Toonimo is one of the few providers with the ability to offer interactive audio-visual in-app cues and walkthroughs with text bubbles to its clients, in addition to the step-by-step walkthroughs. It also supports the auto-translation feature for both text-based walkthroughs and audio-based support
- Toonimo has increased its focus on the insurance industry. In addition to forging a new partnership with Guidewire, it is engaged in various start-up innovation programs within the insurance vertical
- In addition to browser-based apps, Toonimo can support mobile native applications on Android and iOS and win32-based desktop applications
- One of the key strengths of Toonimo is its ability to support multiple environments (testing, UAT, staging, production, etc.). Enterprises that are looking for A/B testing and split URL testing and analytics will find Toonimo's solution to be attractive
- To improve the content creation and administrator experience, the provider uses in-place editing, offers documentation, and provides embedded help tool inside the editor. Additionally, clients are supported with dedicated professional services managers for additional training and support
- Another strength for Toonimo is its goal-based analytics for individual events or actions. This can be leveraged by clients to identify conversion rates, bounce rates, time spent, and click through rates
- Toonimo is SOC 2 and ISO 27001-certified and is compliant with GDPR, HIPAA, WCAG 2.1, and ADA regulations. The company also offers private cloud and on-premises implementation options
- Toonimo is one of the few providers that offers enterprises the ability to view analytics at a user level and understand their engagements with the platform
- Its comprehensive surveying capabilities include multi-choice, NPS, and text surveys and is another key strength for Toonimo. These can be customized and delivered to various segments, and the survey analytics dashboard provides insights to complete the feedback loop
- Toonimo allows enterprises to generate personalized reports on usage analytics using a custom query builder. Additionally, Toonimo provides analytics on curriculum and knowledge base usage to track user progress during onboarding and search activities
- Toonimo offers a wide range of automation capabilities, including support for automatic typing, filling, clicking, and navigation. Additionally, it provides APIs that enable a connection with the underlying application
- Toonimo can support behavior-based triggers to offer more personalized support. It can suggest walkthroughs to users based on page abandonment or time spent not moving the cursor

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Toonimo (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Toonimo has further scope to improve its overall thought leadership and vision for the market. While its technical capabilities are robust, enterprises need to carefully evaluate Toonimo's ability to be their partner and solve strategic problems
- Organizations that need significant assistance in expanding their DAP implementations may not be drawn to Toonimo. Toonimo's strategic support and consulting abilities, such as CoE support and value realization frameworks, are not yet fully developed
- At present, Toonimo's partner ecosystem has limited reach and capabilities. Companies seeking to deploy a DAP through their SIs may not have access to Toonimo
- Clients having a presence in Asia Pacific, Continental Europe, Latin America, and the Middle East & Africa might want to carefully evaluate Toonimo's offerings as its capabilities in these countries might not be mature enough
- Toonimo's training and support are available in English, Hebrew, Spanish, and Portuguese. Enterprises seeking assistance in languages beyond these may not be drawn to Toonimo
- Currently, Toonimo's industry expertise is skewed toward financial services, telecom, insurance, and public sector verticals. Enterprises in other verticals will have to carefully evaluate Toonimo's ability to support core industry-specific applications
- Toonimo's certification programs for content creators, administrators, its partners, or the public, which are helpful in expanding the DAP community are currently not that mature
- Currently, Toonimo does not have the ability to compare usage analytics across applications on the same dashboard. However, the provider is actively working toward bringing this capability
- Organizations that are forward-thinking and exploring DAP providers that offer advanced AI capabilities, such as generative AI, may not find Toonimo to be a suitable option due to its limited capabilities
- Toonimo has limited capabilities in providing enterprises with advanced user behavior and product analytics, such as identifying friction points, process funnels, and adoption rates of applications, prior to the implementation of walkthroughs

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- tts GmbH envisions supporting people and organizations on their digital transformation journeys by acting as a single source of truth for business knowledge such as policies, procedures, and processes, along with digital training material
- It takes a unique approach to digital adoption by providing a sidebar that displays guidance side-by-side within the application window, instead of with overlay walkthroughs. This sidebar goes beyond step lists to also show process illustrations, text, embedded videos, images, and links to PDFs
- The strength of its current offering lies in the automatic contextualization of content in the sidebar based on the user's location in a webpage, ensuring that users receive relevant information tailored to their specific context and making the learning process more effective and efficient
- The provider can offer cross-application guidance, thereby assisting users in completing processes that span multiple applications. Additionally, it is one of the few providers that can provide guidance on Windows-based desktop applications as well
- For ease of content creation and delivery, tts GmbH offers a step recorder to content creators with the ability to record the walkthroughs in three modes simultaneously – presentation, video, and document. In addition, it also provides a web portal for its clients to access the learning content
- tts GmbH has been investing in enhancing its search functionality by allowing users to sift through data from knowledge bases and seamlessly contextualizing search between different systems
- It offers flexible deployment options and can support implementation on both on-premises and SaaS models. This gives flexibility to enterprises that might have corporate data privacy concerns and choose to avoid dependency on outside servers
- The provider offers unlimited, role-based access controls and the ability to source roles from third-party systems such as SAP to allow clients to cater to their specific scenarios
- It provides out-of-the-box integrations with knowledge bases such as SharePoint, ZenDesk, and ServiceNow and has a pre-built configuration for the Microsoft Office help available online
- tts GmbH also offers out-of-the-box, bi-directional sync with SuccessFactors and Cornerstone LMS for offering the existing knowledge in one place to its clients
- Referenced clients have described tts GmbH as their partner and praised its relationship management and responsive customer support
- They also appreciated the user-friendliness of the product and its role in enabling a blended learning approach within their organization

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- tts GmbH continues to primarily serve clients in Continental Europe and has limited presence in other key geographies such as North America, the UK, MEA, Asia Pacific, and LATAM
- Considering the provider's higher focus on providing side-by-side support to its clients, enterprises looking for overlay DAP functionalities such as walkthroughs and tooltips may want to carefully evaluate its offerings
- tts GmbH can offer end-user experience in about 45 languages. However, the content created can only be translated either manually by exporting text in Word or XLIFF files, or by automatic re-recording steps with a different UI language of the application. This has also been pointed out by its referenced clients who cited the need to enhance its language translation functionalities
- Currently, it does not offer in-application guidance and support for mobile/tablet applications
- There is scope for the provider to offer advanced analytics that provides clients visibility into the user adoption of the underlying software and user behavior data based on metrics such as process completion rate, time taken, and user error rates
- tts GmbH does not allow the embedding of data into the application, which limits its ability to cater to automation use cases such as pre-filling text fields/forms and automatically executing repetitive tasks within the underlying application to reduce the number of clicks by the users
- Although the provider allows users to comment on published content and provide ratings on a five-level scale, it does not offer the ability to create general surveys or integrate with third-party surveys to gather user feedback
- While the provider offers built-in version control for content created, it is yet to offer a built-in version control for the product itself to help its clients handle product upgrades better
- Referenced clients expect to see more sophisticated analytics and reporting functionalities, which can help them to delve deeper into data and filter/sort by location, role, or department
- Referenced clients would also like tts GmbH to add a favorites folder in the sidebar where users can bookmark their most used courses for future reference

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Userlane (page 1 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability: Low High

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

Strengths

- Userlane aims to differentiate itself in the market by providing ease of content creation and management. It has one of the most user-friendly editors in the DAP market and consistently enhances its platform to ensure swift and effortless content creation
- The provider is committed to offering security and privacy and it is one of its key differentiators. It is bringing in AnyCloud to offer flexibility to deploy on any cloud infrastructure such as Microsoft Azure, AWS, Google, and Oracle with multiple hosting regions
- It brings a detailed multi-app analytics dashboard to users in a simplified format and its HEART analytics is evidence of its commitment to the same. With HEART, Userlane offers a unified framework for users to gain insights into the usage of an application, identify issues, increase user satisfaction, and improve the RoI
- The provider has also brought in tags to allow its clients to define and monitor various user actions such as the number of times a particular image, button, or link is clicked. It is also working to expand this feature, enabling its clients to track an entire business process through these tags
- Userlane's enhancements empower its clients to nudge a user to utilize a particular feature in the underlying software through beacons, a type of tooltip. It is also bringing in AI-based data validation where clients can use regular expression and natural language to create validation rules
- Userlane offers an API for accessing data, which can be used in third-party tools such as PowerBI, Tableau, and Qlik, in case clients have any custom reporting needs
- The provider offers a connector hub with integrations into the main knowledge bases, such as Zendesk, KnowledgeOwl, and Confluence, to give users the ability to search any content available in an organization and consume it within the Userlane assistant
- It offers a robust content life cycle management process allowing its clients to prepare, test, and demonstrate content in various environments as well as a menu organizer to categorize the walkthroughs based on overarching themes
- It offers a step recording feature that enables authors to record all the walkthrough steps in one go. It also provides an in-place editor to edit/modify content and balloon options next to the element itself, in an intuitive way during the flow of creation
- Userlane is also GDPR compliant and has the ISO/IEC 27001 certification, serving the needs of enterprises with stringent data privacy, security, and compliance policies
- To expand its reach and capabilities, Userlane has been investing in partnerships with service and technology providers such as PWC, Kainos, Orbis, Sopra Steria, and Microsoft
- Clients have expressed their satisfaction with Userlane's strong collaboration in creating new features, its prompt and helpful customer service, and the product's user-friendliness

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Userlane (page 2 of 2)

Everest Group assessment – Major Contender and Star Performer

Measure of capability: Low High

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

Limitations

- While Userlane can support mobile-responsive web apps and has brought in support on Windows desktop applications via formal partnerships with Flowshare and Datango, buyers seeking support for macOS or native mobile applications may not find Userlane to be a suitable solution
- The provider does not offer the ability to create branched walkthroughs for complex workflows; however, the provider is investing in developing this capability
- It does not have the ability to start a walkthrough from the last completed step when a user returns to the application. Auto-starting or suggesting walkthroughs based on user confusion is not available. However, Userlane is actively investing in bringing in these capabilities
- Enterprises seeking pre-built auto-testing functionalities will need to await upcoming product launches as currently, Userlane does not offer auto-testing of generated walkthroughs
- Clients have expressed the need for an improved identification system to determine the reason why a specific walkthrough has ceased functioning, along with consistent notifications to the administrator detailing the underlying cause
- Though Userlane has an established regional partner network, it has the potential to further enhance its partner ecosystem beyond Continental Europe
- Userlane does not provide industry benchmarks or organization-wide benchmarks on metrics such as error rate, time taken, and completion rates
- The provider's training and support are available in English and German. Enterprises seeking assistance in languages beyond these may not be drawn to Userlane
- While Userlane offers pre-built templates on Microsoft Dynamics, Salesforce, SAP SuccessFactors, and Workday to offer clients the ease and speed of content creation, it can further expand into bringing such templates for other horizontal and industry-specific applications
- Buyers have cited a need for better product training to editors to enable them to independently modify or resolve intricate issues

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Ziplyne's user-first approach to digital adoption will resonate well with enterprises seeking to deliver a seamless and simplified digital experience to end-users and maximizing their RoI
- The product facilitates on-the-go learning through features such as walkthroughs or Zips embedded with videos, images, or articles, a self-help widget for on-demand content with the ability to categorize content into multiple folders, and checklists for onboarding new users
- For the ease of content creation, Ziplyne offers a step recording functionality that enables authors to execute a workflow in real time to create an outline of the walkthrough steps and then edit the steps, as required
- It introduced a Guides Autoplay feature, enabling administrators to set settings for guides that will automatically play for the users based on specific triggers, such as time, clicks, or hover
- Ziplyne facilitates incident tracking by allowing users to send screenshots to administrators with a report detailing the step at which the walkthrough stopped and the number of times it occurred
- The provider also offers data validation capabilities for better accuracy of the user data captured in forms and fields as part of various processes
- Ziplyne has been continuously investing to make its walkthroughs more robust by focusing on strengthening its element detection/selection algorithm. In case an element is missing and/or the page layout changes, it can skip steps and move to the next available one
- Ziplyne has developed an integrated portal for administrators where they can get a consolidated view of all the guides, set user segmentation rules, and easily transfer the content created across multiple environments using the bulk migration capability for guides
- The provider tracks key metrics such as completion rates, step-wise data, time spent, and user engagement with different content formats (such as videos, PDFs, or web links), relevant to understanding user behavior and tracking their performance after guidance has been deployed
- Ziplyne is expanding its partnership ecosystem to increase its global outreach. It is investing heavily in enabling its partners through tools such as a help portal, dashboards, workshops, and regular communication channels
- Referenced clients have appreciated Ziplyne for its in-depth analytics, easy configuration and setup, high reliability, and low resource requirements for maintenance and content creation

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Ziplyne predominantly serves the North American market, though it is exploring opportunities and making inroads into other key geographies such as Asia Pacific through its partnership ecosystem
- While Ziplyne can offer in-app guidance support for customer-facing applications, its primary focus is on the employee-facing side, which may be a deterrent to clients seeking DAP for their customers
- The majority of its clientele belongs to the healthcare and pharma industries. However, it has begun diversifying its portfolio by serving clients in BFSI, hi-tech, and the energy and utilities industries
- Ziplyne is yet to develop the ability to offer product analytics to track application utilization and recognize the drop-offs, before or without creating any DAP content; however, this is on its roadmap
- Enterprises looking for a DAP with a pre-filling capability for form fields or the ability to connect to the underlying application through APIs and updating/retrieving information might want to closely evaluate Ziplyne as it does not offer such automation
- The provider does not have the capability to provide cross-application analytics to help clients understand how employees engage with the business processes, areas of user friction, and drop-off points
- Ziplyne currently does not provide automatic translation capabilities, which might result into an additional amount of time for content authors to create content in multiple languages and can be a drawback for enterprises looking to serve a global workforce
- While its team undertakes rigorous security assessments, the provider currently is in the process of securing certifications for data protection and compliance such as ISO 27001 and SOC2 Type 2. This was also expressed as an area of improvement for Ziplyne by its referenced clients
- Enterprises looking for a product with greater accessibility may not find Ziplyne's offering to be appealing as it does not offer any voice, visual, text, or language capabilities
- Currently, it does not have the ability to identify if the user left a walkthrough in between and then start the walkthrough from the next step when opened again, instead of starting at the first step again. However, this seems to be on Ziplyne's roadmap

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

05

Enterprise sourcing considerations

- Aspirants
  - Aidaxis
  - Gyde
  - Shortways
  - Spekit

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- While enabling the adoption of enterprise-based applications remains Aidaxis' key strength, it can also serve the needs of organizations looking to leverage guidance for customer-facing apps
- It is one of the few providers that can provide guidance on both browser and desktop-based applications. In addition, its cross-application walkthroughs can guide a user through a process spanning multiple applications
- The provider has improved its self-help widget by introducing new features such as a search functionality that allows users to find walkthroughs through tags or keywords, sending notifications for new content, and the ability to view the last five walkthroughs accessed by users
- It is one of the few providers that allows users to save their favorite walkthroughs for future use, thereby making it easier to find content and enhancing the overall user experience
- The provider offers a step recorder for content creators to execute the workflow in one go to create an outline of the walkthrough and then edit the steps, as required. Its low-code/no-code approach to content creation is one of its key strengths, which makes it easier for non-technical people to create content
- Aidaxis offers pre-built templates for key applications such as Salesforce, SAP, Oracle, Microsoft 365, and Infor to expedite the go-live of the product
- Enterprises can leverage Aidaxis' analytics staged in Tableau to understand key metrics such as the most played walkthroughs, usage rate, completion rate, and time spent. It also offers custom dashboards and the ability to integrate the analytics with any BI software
- The provider also offers an integrated translation feature that supports both manual and automatic language translation. This will appeal to enterprises with a distributed workforce requiring local language support in languages such as English and French
- Aidaxis supports the branching of walkthroughs for complex workflows. In addition, it allows administrators/creators to define visibility rules and automate steps in a walkthrough, thereby reducing the number of clicks required by end-users
- Aidaxis provides SSO on all tools, thereby reducing constraints for end-users and streamlining user management for enterprises

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Headquartered in France, Aidaxis continues to primarily serve clients in Continental Europe and MEA, and has limited presence in other key geographies such as North America, the UK, Asia Pacific, and LATAM
- Enterprises seeking an in-place step editor to edit/modify content next to the element itself should thoroughly assess its offerings as Aidaxis only offers a step recorder for content creation currently
- The provider does not have the ability to convert workflows into different formats such as videos, PDFs, and slideshows, which may be a drawback for clients looking for flexibility in content delivery
- Aidaxis has limited capabilities in providing enterprises with advanced user behavior and product analytics, such as identifying friction points, process funnels, and adoption rates of applications, prior to the implementation of walkthroughs
- Enterprises looking for a DAP with the ability to connect to the underlying application through APIs and update/retrieve information automatically should carefully evaluate Aidaxis as it currently does not offer this feature
- While the provider supports web- and desktop-based applications, it currently cannot provide in-app guidance on native mobile/tablet applications
- Enterprises looking for continuous product support might find the solution to be less appealing as Aidaxis does not offer 24/7 product support to its clients
- At present, Aidaxis does not have the ability to compare usage analytics across applications on the same dashboard or provide cross-application workflow analytics to help enterprises understand how users engage with processes spanning multiple applications
- Aidaxis is yet to build robust strategic support and consulting abilities, such as CoE support and value realization frameworks. Currently, it only offers implementation services, in addition to change management services provided through dedicated partners
- The product is available only as a browser extension and cannot be deployed by inserting a code snippet within the underlying application

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Gyde (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Gyde is one of the few providers with the ability to offer audio-visual walkthroughs / voice-over capabilities. It also allows users to record different text descriptions to give additional information
- In addition to providing step-by-step assistance, bite-sized training videos, and help articles, Gyde offers ready-to-use guides to its clients for enterprise applications such as Zoho CRM, LinkedIn Sales Navigator, Salesforce, and SAP SuccessFactors
- It has made further enhancements to the product such as offering better-targeted training, smart tooltips, new callout types, custom video upload, and offline features to improve the user experience and increase productivity
- Gyde has secured SOC2 Type 2 and ISO 27001 certification and is GDPR compliant, serving the needs of enterprises with stringent data privacy, security, and compliance policies
- Organizations with multi-country operations requiring local language support will find Gyde's multilingual capabilities to be attractive. It is capable of auto-detecting the user's browser language and subsequently modifying the walkthrough and voice-over to match the detected language
- One of the key differentiators for Gyde is its built-in chatbot, which goes beyond offering guidance and walkthroughs to its users. It can answer questions related to holiday schedules and travel reimbursement and detect any spelling mistakes
- The company has recently added mini quizzes to its chat interface to assist users in evaluating their software knowledge. Additionally, it aims to use generative AI technology to enhance its chatbot and offer a more natural language interface for users
- It is one of the few providers that can support users on native mobile applications, making it a suitable offering for enterprises in the manufacturing, retail, logistics, and construction industries
- It allows users to learn about commonly used processes through its integration with a knowledge base for key applications such as Salesforce, ServiceNow, and MS Dynamics
- Enterprises can benefit from its ability to edit and replace the walkthroughs in real time, without the need to unpublish them. This ensures that end-users always have access to the latest version of the walkthroughs, without any interruptions

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Gyde (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Most of Gyde's current clientele is based in the Indian subcontinent and North America. While it has seen some traction in the Middle East, its presence in other geographies is relatively low
- Gyde has further scope to improve its overall thought leadership and vision for the market. While its technical capabilities are robust, enterprises need to evaluate Gyde's ability to be a partner to them and solve strategic problems
- While the provider supports browser- and mobile-based applications, it is yet to develop the product to offer guidance for desktop-based applications
- Although Gyde has some partners, it currently does not have a fully established partnership ecosystem with SIs and ISVs, which limits its reach and capabilities
- Organizations seeking project-based or goal-oriented dashboards to monitor progress and take corrective actions may not find Gyde to be a suitable solution due to its limited capabilities in this regard. Additionally, Gyde does not offer industry or enterprise-level benchmarks
- Currently, Gyde does not offer a step recorder functionality to ease the content creation process, wherein content creators can execute the workflow in one go to create an outline of the walkthrough steps and then edit the steps, as required
- Although it provides training programs for its customers, the sessions are conducted only for learning purposes and no certification is offered after any program completion
- While Gyde offers basic analytics and out-of-the-box reporting functionalities, there is scope to further enhance its core analytics by tracking metrics such as the current adoption of applications, empty clicks and inactivity periods, drop-off points, and task completion rates
- Currently, Gyde's automation capabilities are limited. It is yet to develop the ability to automatically execute walkthroughs to reduce the number of clicks by the users or the ability to pre-fill text fields/forms within walkthroughs
- Gyde allows users to download analytics only in .csv format, which may be a drawback for clients looking to export data in other formats for analysis

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Shortways (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Shortways is a France-based provider that aims to accelerate digital adoption by providing long-term business support to users, in addition to learning and guidance for application rollout
- It offers a digital assistant to its clients that goes beyond providing a walkthrough repository. Users can raise assistance requests, attach screenshots, and provide feedback directly from their application, and the request is mailed to the relevant teams. Shortways envisions developing this into a smart ticketing system, helping clients streamline their IT support system and reduce costs
- The provider offers the in-place step editing capability to edit content and balloon options next to the element itself and a bulk publish/unpublish option to make content creation easier for its clients
- Shortways has invested in developing a robust search functionality, which can find content even if the user misspells a keyword, helps to sort search results based on relevance and context, enables users to report keywords with no search results, and provides insights to administrators on the top-found or most useful searched expressions
- It offers authors the ability to collect feedback on the walkthroughs and product experience through a built-in feedback mechanism as well as integration with third-party surveys
- The product's analytics capabilities allow for the tracking of key metrics around user interaction with DAP content, such as step-by-step guides, notifications, inline help, and assistance requests. Administrators can drill-down data using multiple filter criteria and analyze user feedback to identify areas of improvement and optimize performance
- The content created can be converted into 26 languages, either manually by the author or automatically via integration with the Amazon Web Services translation engine. Enterprises requiring local language support will find this functionality to be appealing
- Shortways offers pre-built templates to its clients for the faster deployment of its product on Cegid Talentsoft, a cloud-based management solution for human resources, finance, and retail
- The provider offers flexible pricing models to its clients based on application usage. It provides the option to subscribe to specific modules of the application where guidance is needed, rather than having to subscribe to the entire application for all users
- Referenced clients have indicated a high overall satisfaction, especially with the product's functionalities such as contextual help, notifications, FAQs, and embedded support

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Shortways (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Most of Shortways' clients are based out of Continental Europe, especially France. It has a relatively low presence in other geographies such as North America, the UK, APAC, and LATAM
- The provider's current portfolio is skewed toward serving enterprises for their employee-facing use cases and its ability to support buyers for customer-facing applications is relatively untested
- While it offers in-app guidance through walkthroughs and tooltips, it does not provide a checklist feature that displays a set of tasks that the user must complete for successful onboarding
- It does not offer administrators the ability to integrate with third-party support and ticketing systems, such as Zendesk, HubSpot, ServiceNow, and Jira. This was highlighted by some of the referenced clients as an area of improvement for Shortways
- Shortways currently supports walkthroughs only on browser-based and mobile-responsive applications and does not support desktop applications and native mobile applications
- While the provider offers remote maintenance support, it does not have round-the-clock support for its clients. It offers support only on business days during the French working hours
- Shortways currently supports the ability to export created walkthroughs only in Excel, and not in any other formats such as videos, PDFs, or slideshows. This might be a drawback for enterprises looking for flexibility in the mode of content delivery
- Although its data is hosted in Amazon Web Services, clients with data regulation constraints may find its offering to be less attractive as it does not support on-premises and private cloud-hosting models
- Though Shortways has added analytics capabilities, there is scope for improvement in terms of tracking user behavior such as empty clicks and inactivity periods, drop-off points, and the ability to track application utilization before deploying walkthroughs
- Shortways' capabilities and offerings currently do not include use cases employing next-generation technology solutions such as automation, AI, and ML
- While the product is GDPR compliant, it is currently not compliant with other major security standards such as ISO 27001 and SOC2 Type 2

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Spekit (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Strengths

- Spekit specializes in providing in-app support for Salesforce applications, aiming to accelerate productivity, onboarding, and the adoption of sales representatives in an enterprise. It stands out as a certified Salesforce provider, with its product being developed on the Salesforce platform
- Spekit offers Spotlight, a feature that enables communication through pop-ups, allowing buyers to direct individuals to content or announcements
- The provider offers automated solutions that enable users to effortlessly maintain current Salesforce documentation. With its auto export/import feature, users can conveniently import existing documentation to Spekit or export it to other formats such as Excel or PDF
- It offers an integrated sidebar that provides a searchable knowledge base within Salesforce, Outreach, and Slack. This integration helps enterprises centralize their knowledge and organize and personalize content by topics, tools, or teams, to make it easily accessible
- The provider also presents a Wiki in its sidebar, which is helpful for users who are unsure of what they are searching. This Wiki allows for easy browsing of content that is organized into accessible folders
- Spekit offers clients with analytics on content engagement, which includes the tracking of metrics such as the total number of views, views by topic, and average viewing time per user. These metrics provide valuable insights into user engagement with the content. Furthermore, Spekit enables the export of this data in .csv format for additional analysis and reporting
- To simplify content creation and deployment, it offers a library of pre-existing content for popular sales tools such as Outreach, ZoomInfo, Salesforce, CPQ, LinkedIn, and others
- Spekit holds SOC 2 Type II certification, ensuring the protection of customer-sensitive data and offering a secure product
- Enterprises can create Knowledge Checks, which are bite-sized assessments that allow them to measure retention of training content within the flow of work, as an additional feature provided by the provider

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Spekit (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 and strategy	Product capability	Analytics and reporting	Implementation and support	Engagement and commercial model	Overall

Limitations

- Buyers located outside of North America should conduct a thorough evaluation of the provider's offerings as it lacks experience in serving clients from the regions of Continental Europe, the UK, and APAC
- While Spekit prioritizes meeting the needs of buyers looking for a DAP for internal-facing use cases, with a focus on Salesforce sales enablement, this emphasis may not fully address the needs of HR, IT, and L&D leaders who are exploring other use cases
- Organizations that need significant assistance in expanding their DAP implementations may not be drawn to Spekit. Its strategic support and consulting abilities, such as CoE support and value realization frameworks, are currently limited
- Spekit has a direct integration with Chrome, but if clients are using other web browsers such as Internet Explorer or Mozilla Firefox, or accessing the product via mobile devices, they will need a Salesforce domain and must install the Spekit Lightning Component to use Spekit. Those who are looking for a DAP for desktop or native mobile applications may not find the product to be appealing
- Enterprises looking for a DAP with the ability to automatically execute walkthroughs to reduce the number of clicks by the users or the ability to pre-fill text fields/forms within walkthroughs might want to closely evaluate Spekit as it does not offer such automation
- Buyers looking for data validation capabilities for better data accuracy might find the product to be less appealing as it does not offer format or data validation while filling up the forms
- Clients seeking a more sophisticated product with advanced analytics to track metrics such as the current adoption of applications, user behavior such as empty clicks and inactivity periods, drop-off points, and task completion rates may not find Spekit's current offerings to be suitable
- At present, the provider's partner ecosystem has limited reach and capabilities. Companies seeking to deploy a DAP through their SIs may not have access to Spekit
- Currently, Spekit has not developed the ability to roll out surveys to collect user feedback within its application

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

06

Appendix

Glossary

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

Glossary of key terms used in this report (page 1 of 2)

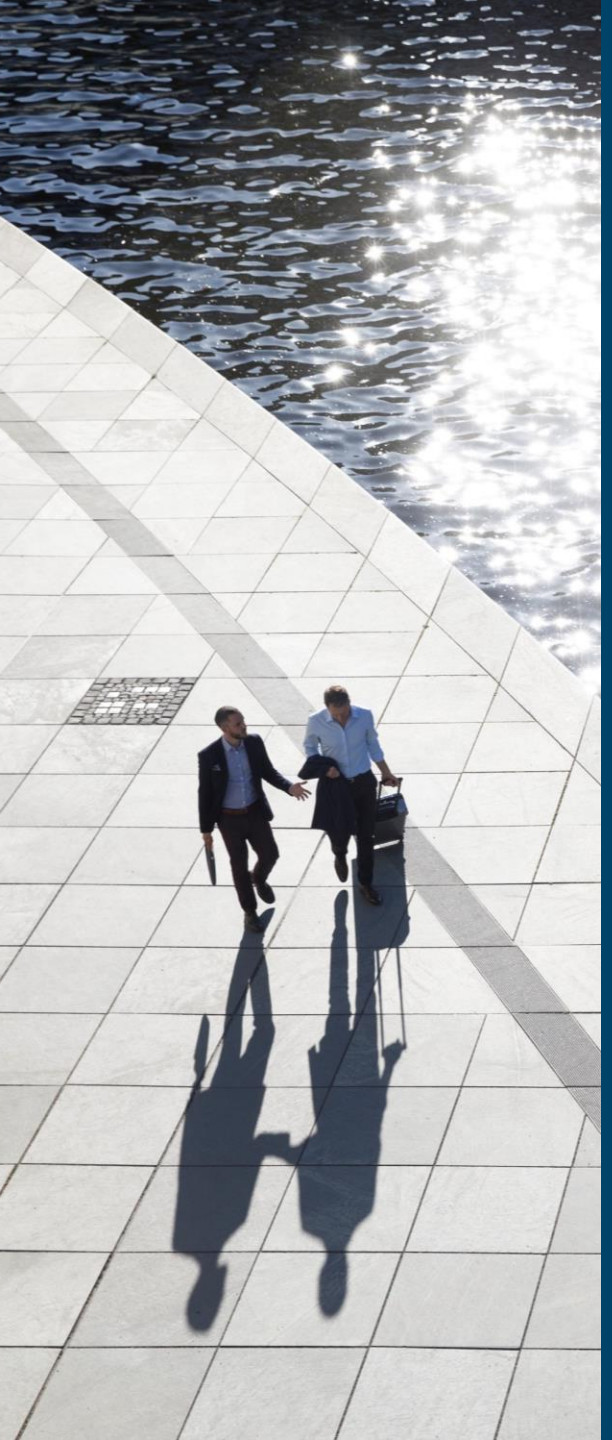
Administrator	Responsible for initial customization and personalization settings to suit the underlying software's appearance, for testing or previewing the walkthrough and publishing it, and for assigning user-based roles. Responsible for creating user segments and the content specific to a particular 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 highlight 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

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe

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

Proprietary © 2023, Everest Global, Inc. | this document has been licensed to WalkMe



Everest Group®
With you on the journey

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

Stay connected

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

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

Website
everestgrp.com

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

Blog
everestgrp.com/blog

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

NOTICE AND DISCLAIMERS

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

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

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

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

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