

IDC TechBrief: Digital Adoption Platforms

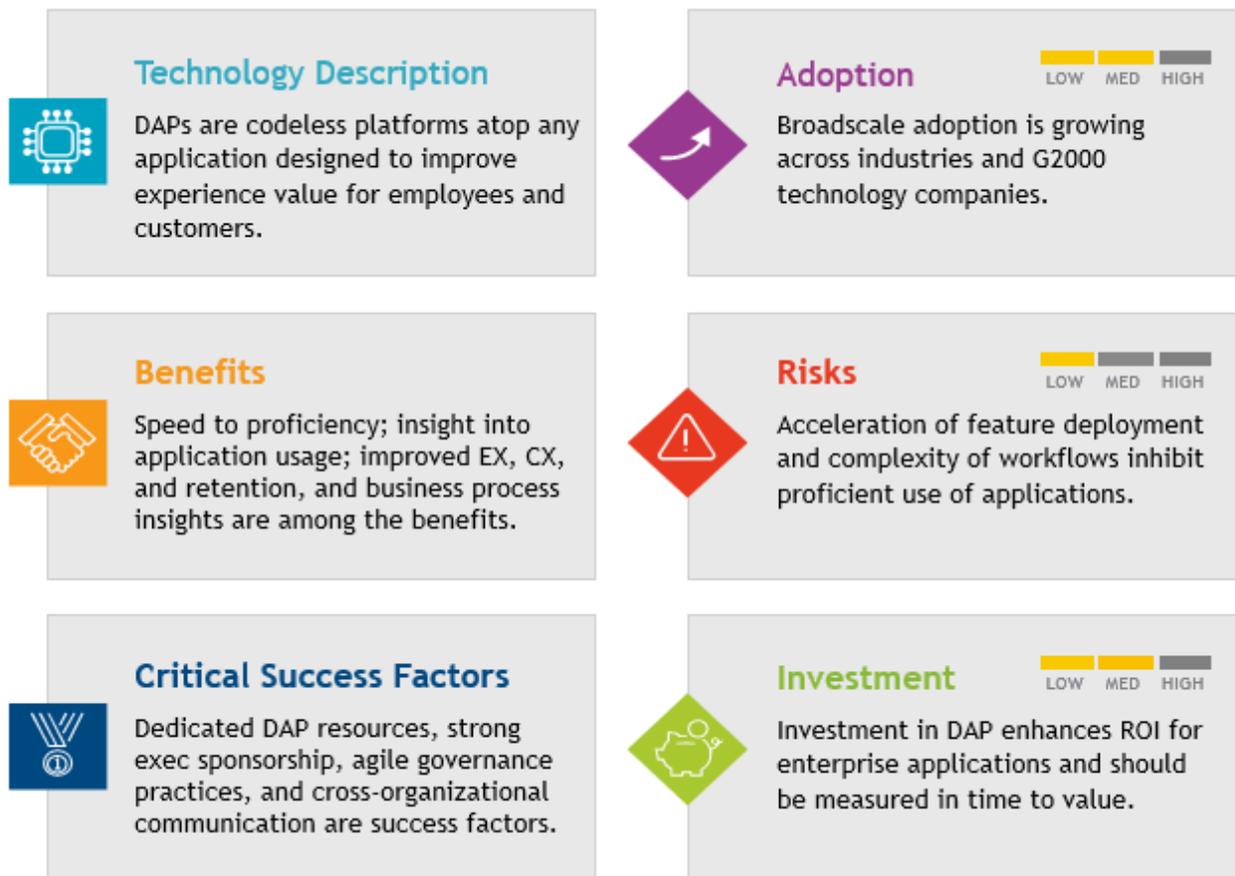
Marci Maddox

Amy Loomis, Ph.D.

IDC TECHBRIEF FIGURE

FIGURE 1

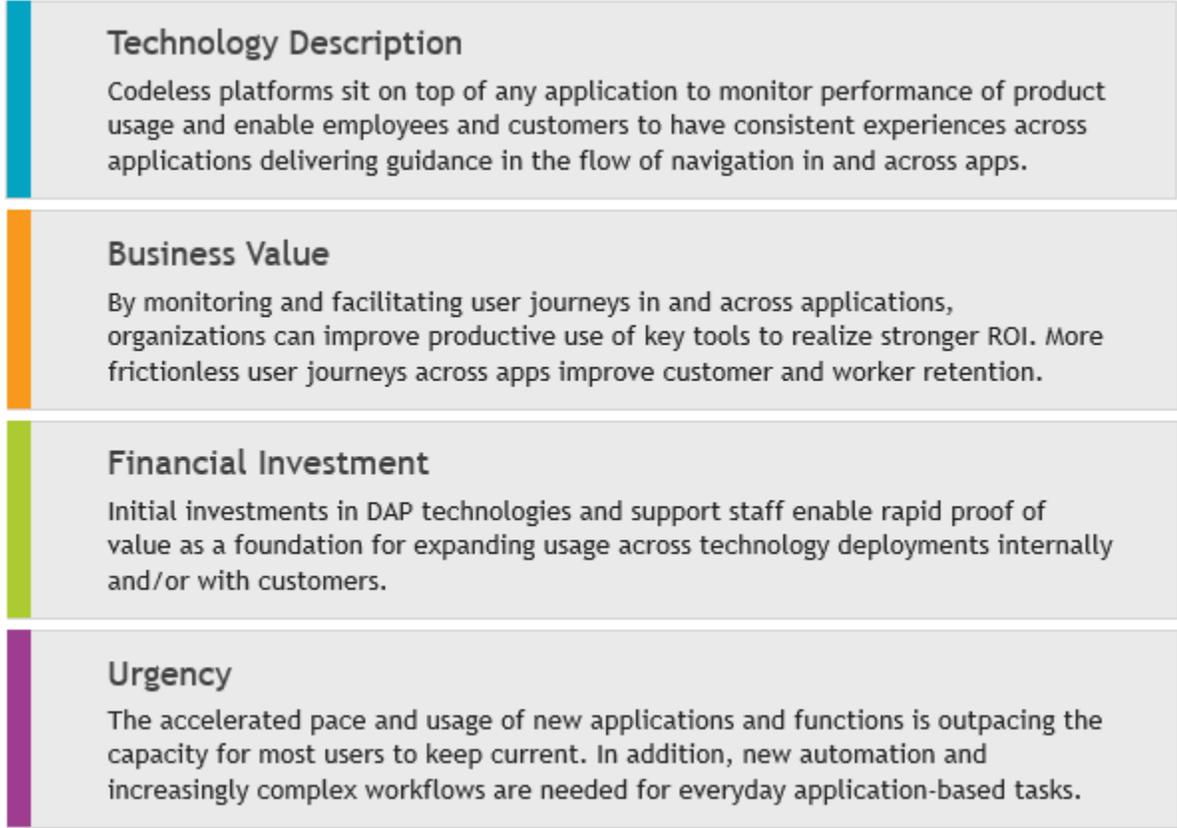
Digital Adoption Platforms: Snapshot



Source: IDC, 2022

FIGURE 2

Digital Adoption Platforms: Executive Description



Source: IDC, 2022

Driven by a continuation of remote work, support for online self-service, and technology cost savings, digital transformation continues to be a major investment for many organizations. According to IDC's October 2021 Future Enterprise Resiliency and Spending Survey, 74% of organizations have digital innovation initiatives underway. However, investments in enterprise applications are made with a hopeful expectation that users, whether internal employees or external customers, partners, and so forth, will find value in using the solutions being deployed. To avoid technology investments becoming shelfware or yielding a negative employee or customer experience, digital adoption platforms (DAPs) can be deployed to encourage better utilization of the application and offer insights into which applications the employees and customers use most.

A digital adoption platform is a codeless software addition to an enterprise application designed to guide users on how to best use the application and simplify processes involved in completing an action. Once the DAP is integrated into the website, web app, or desktop application, it can provide

guidance cues within the user interface or tool tips to prompt the user to take a best path action. DAP products have been developed to improve user onboarding and training for employees as well as guide interactive experiences for customers. For example, if a new hire needs assistance in selecting their employee benefits, the DAP can guide them through the HR application using a series of prompts to complete the process with minimal disruption.

ADOPTION VIEWPOINTS

FIGURE 3

Digital Adoption Platforms: IDC's Adoption View

IDC's adoption scenario viewpoints	Adoption	DAP technologies are growing rapidly both as standalone platforms and as embedded aids within existing platforms to improve work processes.
	User profile	DAP technologies are deployed across most industries, especially those with process-intensive application usage requirements or complex products.
What it means for business executives	Use case	Use cases include deployment with both employee and customer-facing applications, improving user experiences and insight into business processes.
	Metrics	Metrics include speed to onboarding/proficiency, productivity, improved license usage, cost savings, and streamlined change management.
	Customer impact	Customer impacts include improved customer satisfaction, improved brand loyalty and recognition, and speed to value.

Source: IDC, 2022

There are many different stakeholders whose job or business success is directly tied to the effective adoption of software applications. From the vantage point of the application or SaaS vendor, the key is to ensure that buyers rapidly realize value from using one or multiple integrated applications thereby driving increased revenue and brand value. Buyers in turn want to ensure that employees and/or their customers use the application to its fullest potential and have a great experience during the process. Beyond the benefits of a positive user experience with one or multiple applications, both application vendors and organizations that deploy multiple complex applications want to better understand what the user journey is telling them about how the applications are used and gain insight into the patterns of work across their businesses. Organizations can benefit from DAP technologies to improve adoption of an application in many different scenarios. Some DAP systems can automatically provide

personalized guided tours to introduce users to new features or recommendations to simplify a task. In other cases, DAP editors can create an overlay interactive map to navigate a custom workflow. To address visual or audio accessibility standards, a DAP may provide prompts for language translation or pictorial alternatives for actions or instructions. To avoid rage clicks, dead ends, or deviation from a proven path, a DAP can instantly update a customer journey in real time as fields are filled in or actions taken. With continuous monitoring of user activities, a DAP can pop up a survey or tool tip when the user exceeds the average time to complete an action, such as a form submission or cart purchase.

Traditional customer enablement and partner certification of new software often involved manual class creation and either in-person or virtual classroom presentations. As vendors migrate their software to SaaS-based cloud applications, the frequency of new features and updates will increase. Traditional enablement will fall behind due to the manual nature of content creation. With a DAP to augment the SaaS solution, artificial intelligence (AI) can automatically detect changes in the user interface or process steps and automatically create the necessary user training. The DAP can offer personalized assistance of new features based on the last time the user was in the application, even if there have been multiple revisions of the software deployed. However, not all DAP systems offer this level of automation natively; some require development extensions or a systems integrator to implement the capability.

As the relationship between customer experiences and employee experiences becomes increasingly interconnected, DAP technologies will become an expected element in paving the way for employees to rapidly familiarize themselves with the latest functionality of increasingly automated systems. It will also be considered an essential customer "onboarding" technology to help presell and quickly upsell customers that are adopting new applications or complex systems designed to run their businesses.

Technology Road Map

Understanding which applications are being used, which tasks or new functionalities pose challenges to users, or where end users (employees or customers) drop off in the journey are key use cases for a DAP solution. However, a DAP is not a replacement for good user experience design. The pandemic elevated the importance of the customer and employee experience such that application vendors are paying attention to the usage of their products and building API frameworks and supporting agile dynamic interfaces for partners or developers to tailor the experience to a specific need.

Leveraging this foundational change, DAP systems provide an overlay to applications supporting personalized experiences without requiring software changes. For example, with AI-driven dashboards, DAP systems can recommend a next step based on thresholds for lost sales or site abandonment. A DAP can identify repetitive tasks that can be automated or simplified to increase overall adoption of the tool. Likewise, DAP technologies are not a replacement for learning management systems (LMSs) focused on employee skills development. However, they do often integrate with an LMS and are designed to supplement these formal learning and development tools.

DAP systems are a new entrant to the digital experience space. As awareness of these applications grow, organizations can identify easy tasks to trial a DAP system. For example, training teams can realize immediate benefits from a DAP by replacing existing offline, internally developed guides. End users who seek answers on how to use the application via FAQs or a Google search would benefit from integrated DAP guidance that does not require them to leave the application. As the organization gains experience using the DAP, more complicated scenarios or AI-based automation can be incorporated.

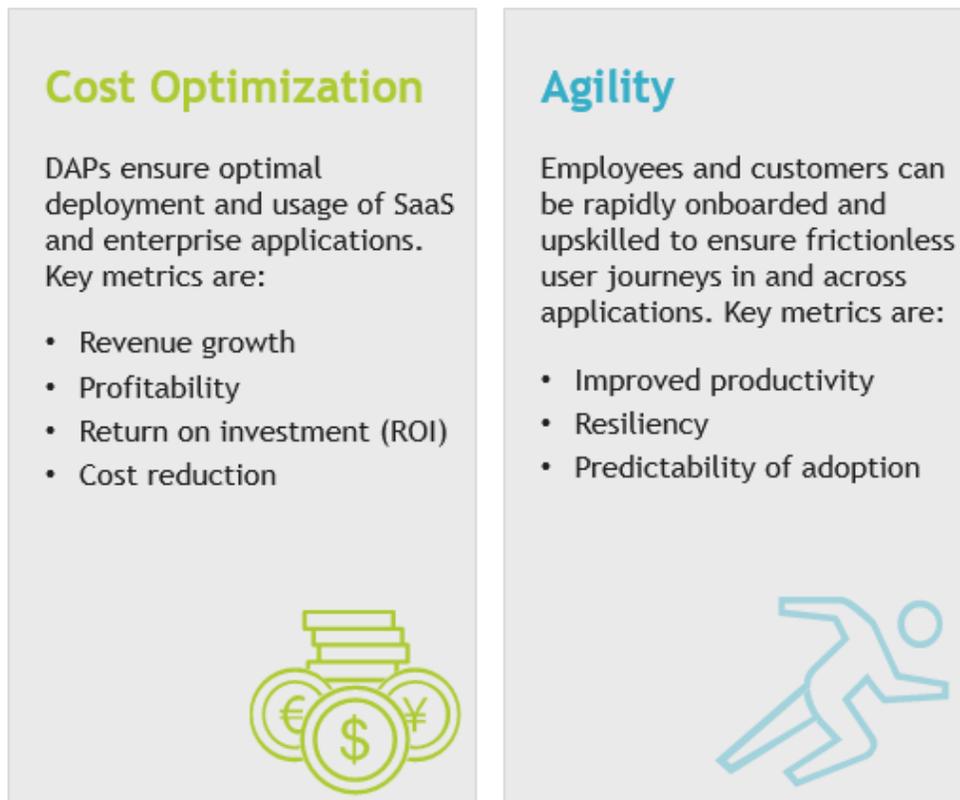
Adjacent Technology Impact

It is not uncommon for the implementation of a DAP system to have a technology investment or resource impact on learning and development programs. DAP systems can be compared, and possibly replace, elements of a learning management system, though enablement is only one aspect of the DAP's function. From a resource perspective, human-led training, how-to videos, and journey mapping development may no longer be necessary. To be sure, DAP deployments require initial human development and governance though many are primarily AI enabled. The DAP can also compete directly with the desktop or mobile application native in-app documentation or guidance functions. The difference is that a DAP can span multiple applications and processes where a single application would not have awareness of those systems or would require custom development to address.

METRICS THAT MATTER

FIGURE 4

Digital Adoption Platforms: Metrics That Matter



Note: IDC believes the metrics listed in Figure 4 are the best fit metrics to communicate value for this technology.

Source: IDC, 2022

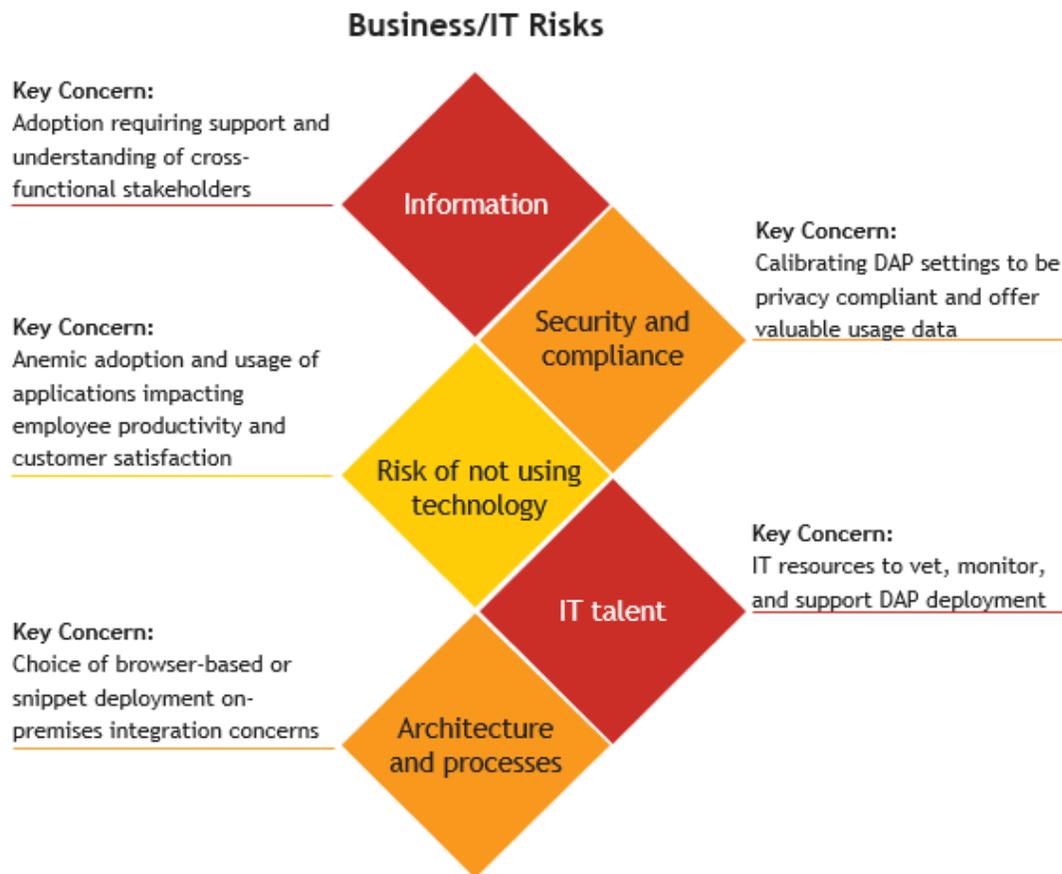
Communicate Using Metrics That Matter

The nature of digital adoption platforms is that they sit on top of any application to derive additional value in the form of improved adoption and performance of the application. The users of the application will see a gain in software or mobile app proficiency that will in turn deepen their trust in and recommendation of the application. Utilizing the DAP's native analytics and reporting features, organizations can gain insight into usage and find additional areas to automate or streamline workflows and activities. The metrics of speed and agility directly correlate to the improvement in customer and employee experience key performance indicators (KPIs). For example, customer satisfaction is influenced by measuring consistent experiences across multiple applications and reduced call center assistance, which benefits the business in higher conversion rates and revenue growth. Organizations can also map improvements to employee KPIs in reduced support tickets, improved license utilization, speed to remote onboarding, and higher levels of productivity.

RISK PROFILE

FIGURE 5

Digital Adoption Platforms: Risk Profile



Source: IDC, 2022

Critical Risk Assessment

There is a convergence of personalization and data privacy coming to a head with the move away from third-party data stored in the browser often used to control the user experience. DAP systems that gather data with permission from the consumer will need to provide data storage certifications and generate a GDPR-compliant personalized digital experience. DAP systems that require data storage should only be deployed where the user has consented to first-party data sharing. Today, DAP systems use browser extensions, code snippets, mobile SDKs, desktop agents, or third-party plug-ins to interface to the application and big data storage for processing transactions and offering session replays. Organizations should evaluate these system requirements against established IT policies.

DAP systems are designed to work with and across base applications and therefore must provide a robust, secure API framework or native technology integration support for the organization to take advantage of cross-application guidance, automation, and analysis. DAP systems also provide cross-platform support including desktop and mobile devices. Organizations that have specific technology stack requirements (Windows, macOS, Android, iOS, etc.) should be cognizant of any potential custom development to connect to incumbent applications and the risk of interrupting automated tasks, such as continuous upgrade deployments.

Organizational Readiness Assessment

DAP deployments require operational changes at the people and process level. Organizations should identify key stakeholders that understand the application user interface changes and underlying processes that will need to be communicated to employees and customers. While many DAP systems provide codeless wizards to generate the tours or tool tips, expertise is needed in technology development, user experience design, and learning materials creation. DAP deployment also requires advance planning and socialization for organizations not familiar with its purpose. Key areas for preemptive communication are with IT leadership concerned about security and learning and development leaders who may not understand its relationship to LMSs.

External partner support may also be required for in-app guidance to drive improved adoption rates for proprietary products or third-party software. For organizations with complex or large-scale deployments associated with organizational change, DAP vendors may partner with business consulting and other IT services vendors to plan for smooth deployment.

CRITICAL SUCCESS FACTORS

FIGURE 6

Digital Adoption Platforms: Critical Success Factors

Critical Success Factor	Business Success Priority
People	Frictionless digital adoption experience for employees and customers, ensuring strong engagement and loyalty
Business	Maximized business potential via improved application usage and insight into technology adoption ROI; focus on higher-value business processes and reduced need for remedial IT support
Technology	Improved ability to realize the value of application features, functionality, and integrations, especially when paired with agile deployment informed by user adoption behaviors

Source: IDC, 2022

Customers and employees expect a consistent user experience and streamlined usage of an application or workflow across a series of applications. IT and business leaders can measure DAP ROI and align it to desired business outcomes such as lower call center support volume, improved speed to resolution on support requests, or improved productivity via workflow automation. DAP technologies can also measure the value of time to proficiency in both a single application and multiapplication use.

DAP systems can address stakeholder concerns about skills gaps on legacy applications, rapid onboarding of contract or remote employees, workforce agility, and better asset utilization. DAP deployments may grow organically as improved user experience, speed to value, and cost savings become widely recognized. Organizational interdependencies such as marketing's focus on customer journey optimization or automating technical documentation extend contribution to the DAP ROI.

SELECT PRODUCT LIST

FIGURE 7

Digital Adoption Platforms: Select Products

Product	Why Product Made the List
Appcues Digital Adoption Platform	Appcues creates personalized in-product guidance to support onboarding and engage users, provide scalable self-service support, announce new features and promotions, and collect real-time contextual feedback.
AppLearn Adopt Platform	AppLearn offers frictionless communications, resources and guidance for users working with business applications, and intelligent data dashboards for administrators.
Apty Digital Adoption Platform	Apty works with any web-based application to track usage and provide on-screen help. Apty's AI engine analyzes the user data and provides actionable insights.
Chameleon Digital Adoption Platform	Chameleon offers in-context guidance for onboarding, feature adoption, and feedback functionality. It automatically collects the data on tour performance that can be used to optimize tours.
Pendo Product Experience Platform	Pendo offers insight into end-user usage and avoidance of specific features guiding in-app messaging and no-code walk-throughs that address challenges with specific features and workflows.
Userlane Digital Adoption Platform	Userlane provides step-by-step interactive guidance technology and on-demand virtual assistant that offers contextual and tailored support targeting both employee and customer onboarding and training.
WalkMe Digital Adoption Platform	WalkMe offers AI, analytics, engagement, guidance, and automation via a transparent overlay that assists users to complete tasks easily within any enterprise software, mobile application, or website.
Whatfix Digital Adoption Platform	Whatfix provides contextual real-time user guidance for application training, learning, and support that integrates with leading learning management systems and applications.

Source: IDC, 2022

These vendors represent a growing list of DAP solution providers based on established market share. The deployment models, technology requirements, and feature set vary greatly across these vendors. The level of maturity, breadth, and sophistication will vary considerably depending on the vendor. IDC limited inclusion to commercial packaged software with mature technology and deployment to multiple regions in this document.

IDC recommends that organizations start by planning proof of concept or competitive pilot assessments to select the right DAP vendor. Consider the level of change desired and the resources required for effective and evolving DAP deployment. IDC recommends establishing a digital adoption center of excellence to determine the most effective starting point, oversee DAP deployments across the organization, and establish regular reviews of updates, collection of user feedback, and communication of critical success metrics.

LEARN MORE

Related Research

- *Barriers to Digital Experience Investments* (IDC #US48364421, November 2021)
- *IDC FutureScape: Worldwide Future of Work 2022 Predictions* (IDC #US47290521, October 2021)
- *Equipping Work Sites and Digital Workspaces for Hybrid Work* (IDC #US48098421, July 2021)
- *The C-Suite Tech Agenda for 2021: What's Top of Mind for HR Executives?* (IDC #EUR148040021, July 2021)
- *Relating Employee Experience to Customer Experience* (IDC #US48114321, July 2021)
- *What It Takes to Automate Work for a Hybrid Future* (IDC #US47712921, May 2021)

Synopsis

This IDC TechBrief describes the needs, use cases, risks, and success factors associated with digital adoption platforms.

"As organizations settle into a digital-first world, obtaining the most value out of their technology investments is essential," says Marci Maddox, research director, Digital Experience Management at IDC.

"With traditional approaches to employee onboarding and product training becoming obsolete, digital adoption platforms offer context-aware training and AI-based process enhancements that both improve speed to adoption for users and drive greater business value for software vendors and purchasers alike," adds Amy Loomis, research director, Future of Work, at IDC.

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Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com

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