

Digital Adoption Platform (DAP) Playbook

Executive Summary



Preface



The aim of the DAP Playbook is to empower enterprises at various stages of their digital evolution with insights into the role and impact of DAP in digital journeys and to help develop strategies to improve outcomes from their DAP investments.

At the time of publishing this playbook, many countries are recovering from the COVID-19 pandemic, while some are still battling it. This has thrown the world into an unprecedented crisis, stress-testing organizations' business continuity plans. Every industry has been impacted one way or the other. In response, a significant portion of the world population has been staying indoors. As a result, alternate work models such as work from home have seen a huge rise. The importance of remote training and support is significantly amplified in this crisis, and organizations are looking at solutions to accelerate their journeys to make their business models more resilient to pandemic-like situations. Solutions such as DAPs can play a pivotal role as they help enterprises solve some of these challenges.

This playbook will help enterprises understand the various components of the DAP market and help them scale up their DAP adoption across the organization to make them more resilient and competitive.

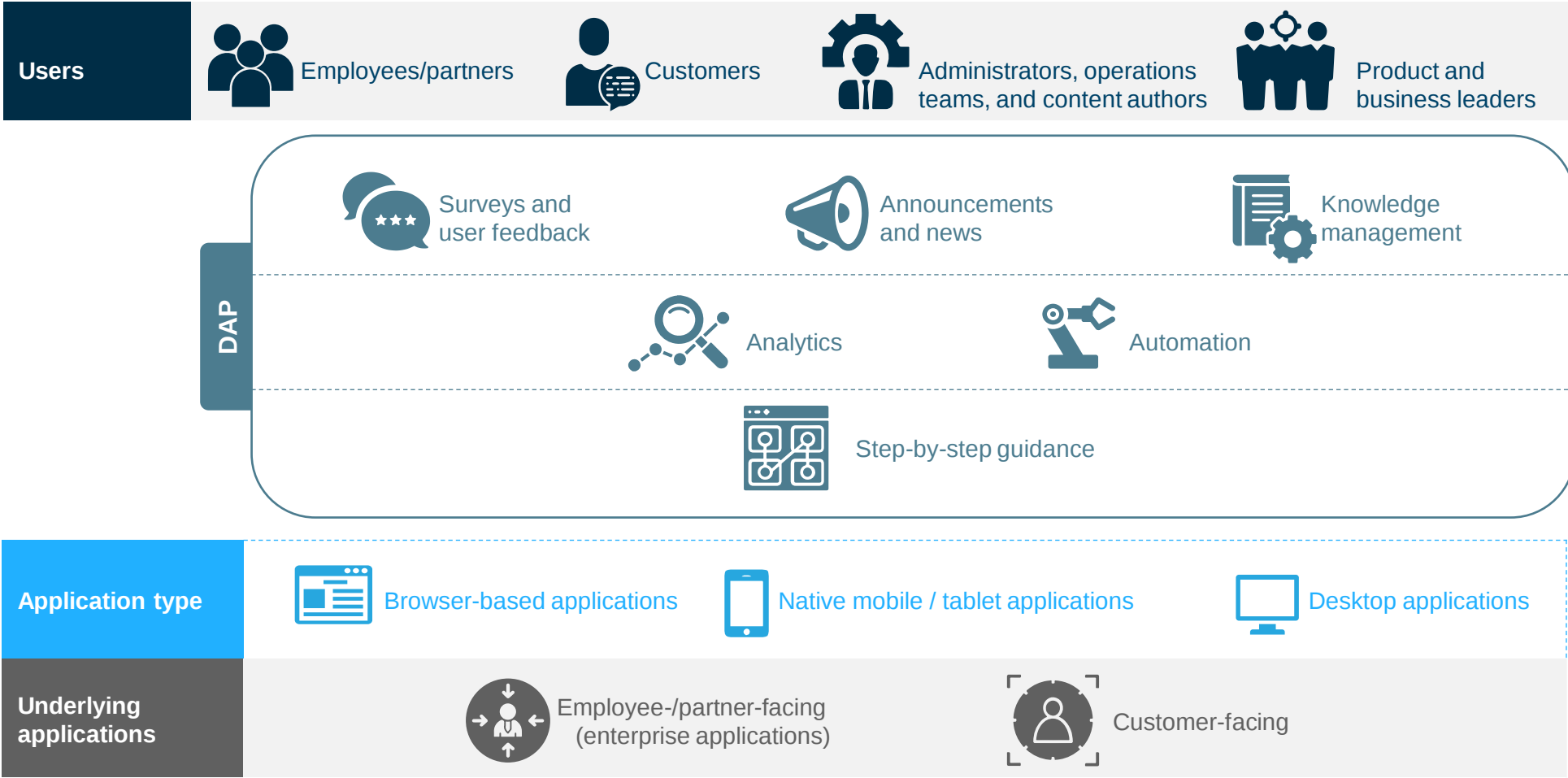
Key contents of the DAP playbook



Understanding DAPs (page 1 of 3)

DAPs are solutions that are designed to facilitate seamless adoption and learning of the underlying applications through step-by-step guidance

NOT EXHAUSTIVE



Understanding DAPs (page 2 of 3)

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

NOT EXHAUSTIVE



Step-by-step guidance

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



Analytics

Ability to offer insights across user interaction with DAP content, as well as interaction with the underlying application. Pre-DAP implementation analytics helps in identifying areas of digital friction and helps in ROI evaluation. Enterprises can understand the adoption of their digital assets and user engagement, among others



Automation

Executing the business processes automatically, auto-filling standard data fields – while seeking users’ interaction only at the relevant places. This minimizes the number of empty clicks by users, ensures better data quality, and increases overall employee productivity



Surveys and user feedback

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



Announcement and news

This enables enterprises to provide users with up-to-date information regarding the application, push new content, inform about new feature releases, or share company news with employees (*need not be related to the application itself*)



Knowledge management

Multi-format content export: Ability to convert the walkthroughs to other formats (e.g. PDFs and slideshows)
Self-help widgets: A centralized location to access the relevant information from knowledge bases, LMS, etc.
DAP’s integration capabilities help in bringing in data from various knowledge sources

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 features such as balloons, tooltips, and help widget

Balloon

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



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

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

Tooltip

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

Contextual help widget

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

Brief description about the element/field

Step 2

Step 3

Step 1

CLICK HERE

Application

Typical use-cases

Most of the DAP use-cases fall under two key categories – customer-facing use cases and enterprise use cases, typically for employees and partners of the organization

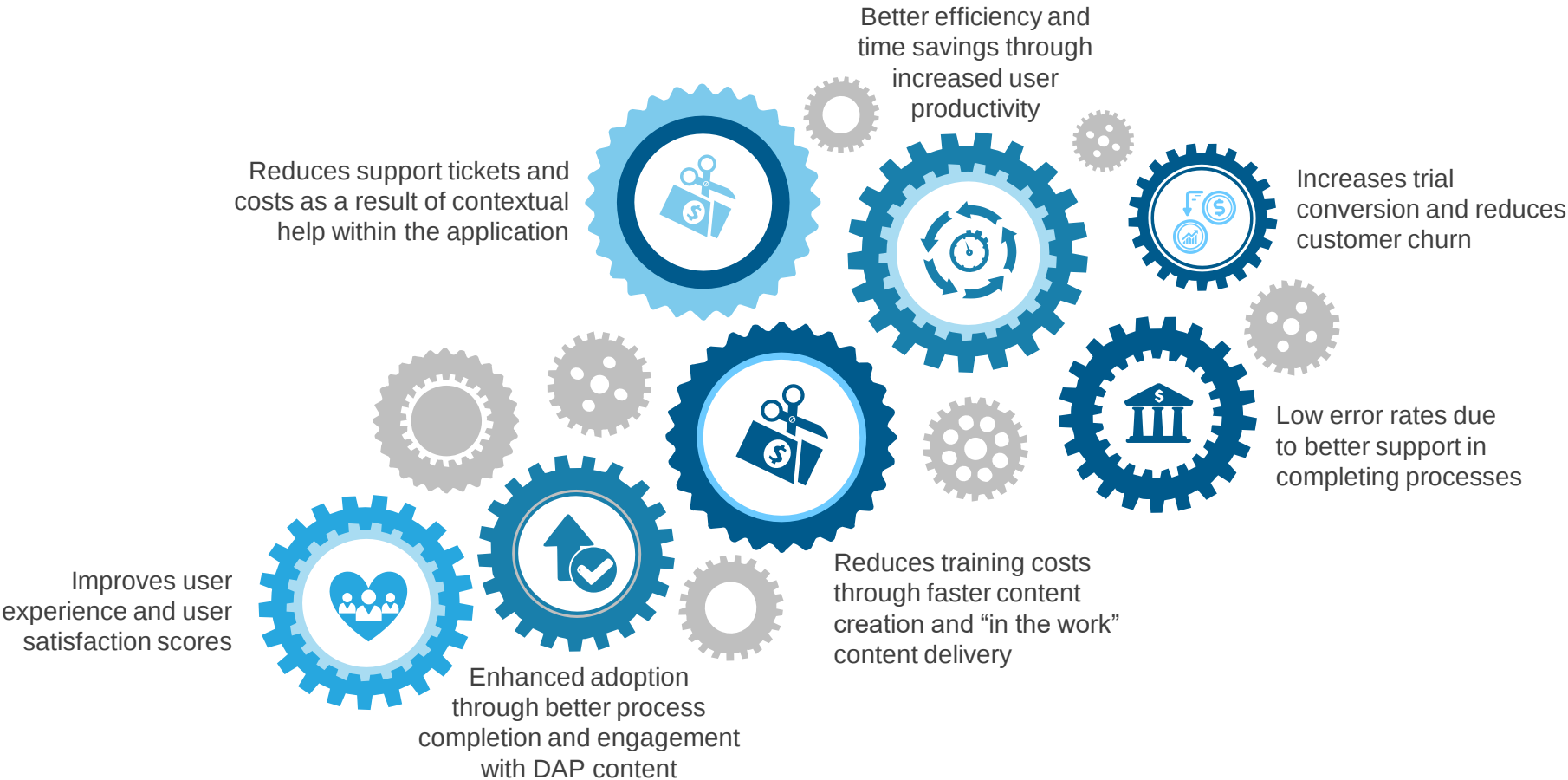
NOT EXHAUSTIVE

	Customer-facing use cases	Employee/partner-facing use cases	Both
	New user onboarding and adoption		
DAPs, by providing personalized onboarding experiences, can enable users to onboard a product and start adopting the various features quickly and effectively			
	Employee training / remote training		
DAPs provide learning in the flow of work and throughout the digital adoption life cycle. This helps employees retain the information and helps maintain a certain level of employee productivity			
	Digital transformation and change management		
DAPs can enable a smooth transition for employees to a new software by explaining the process or application changes – reducing the user confusion and frustration			
	User support and helpdesk		
By providing in-app support and self-service features, users can get answers to queries and guidance to complete critical tasks, reducing the burden on the support staff / helpdesk			
	Product improvement		
Feedback collected from the DAP provides valuable insights for product owners to understand user behavior and help improve solutions to make them more user-centric			

While these are some of the more prominent ones, there are other use cases such as communication/announcements or use cases that may be specific to an enterprise depending on the industry it operates in or the initiating stakeholder(s)

Key benefits of DAP

DAPs enable enterprises to improve productivity, reduce costs, and enhance the user experience



Key contents of the DAP playbook



DAP execution paths can be broken down into four key phases

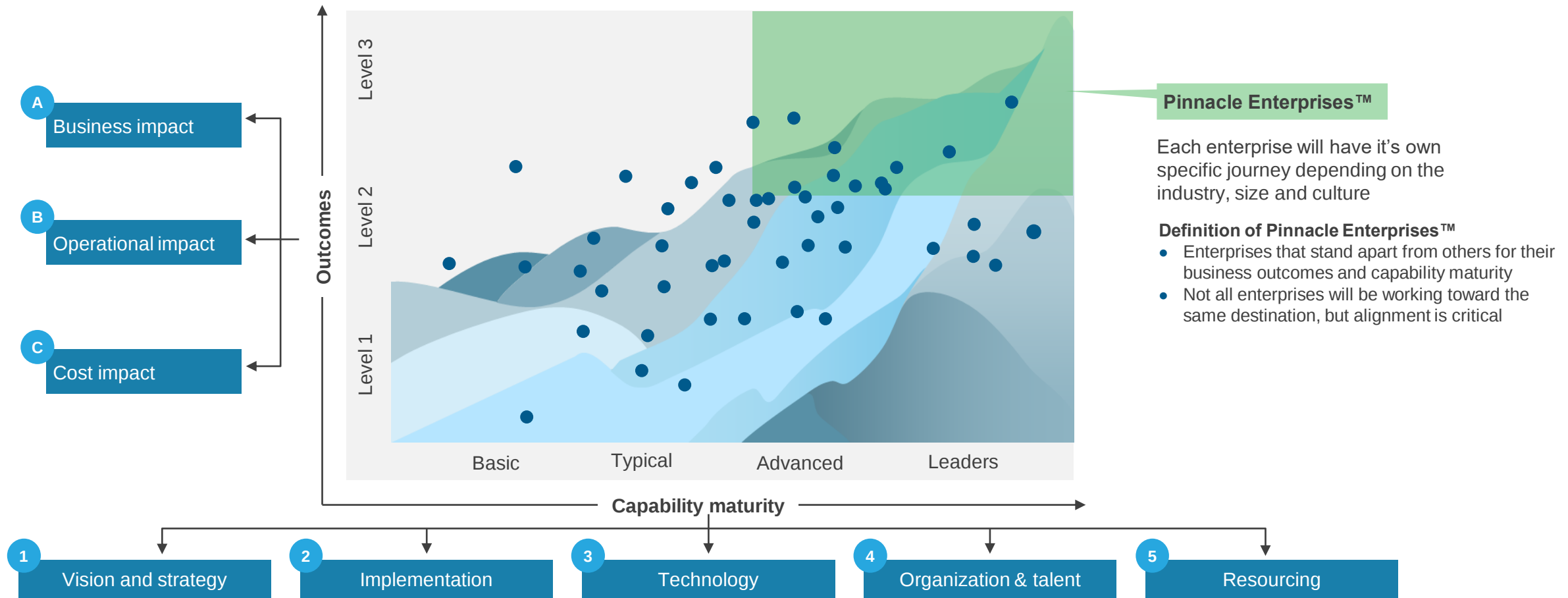
Everest Group breaks down enterprises' DAP execution path into four key phases

	Phase 1	Phase 2	Phase 3	Phase 4
	Planning 	Piloting 	Scaling up 	Steady-state 
Key Focus	• Business case • Proof of Concept (POC) • Tool selection • Develop DAP strategy	• Select initial use cases • Run pilot projects • Monitor performance	• Refine DAP strategy • Establish/refine the DAP governance model • Scale up across enterprise • Establish DAP best practices • Set up CoE and embed necessary talent • Identify new opportunities	• Institutionalize the governance model • Continuously improve • Create awareness
	• Overcome conceptual barriers to DAP implementation and build awareness • Identify opportunities • Develop the business case • Align stakeholders (HR, IT, business, product owners, etc.) to get backing for the POC • Select tools/partners • Identify skill sets required • Develop an implementation approach and roadmap	• Get executive backing and funding • Develop/train skill sets for DAP implementation • Select and prioritize applications • Select and prioritize processes within applications • Implement initial use cases / pilots • Monitor performance • Raise awareness and enable upskilling/reskilling	• Act on lessons learned to refine the DAP strategy and establish/refine the DAP governance model • Scale up across functions/geographies • Scale up upskilling/reskilling of resources • Set up a dedicated team and continuously identify new opportunities for DAP adoption	• Ensure operations with robust governance and controls • Integrate a culture of innovation and design thinking across the organization

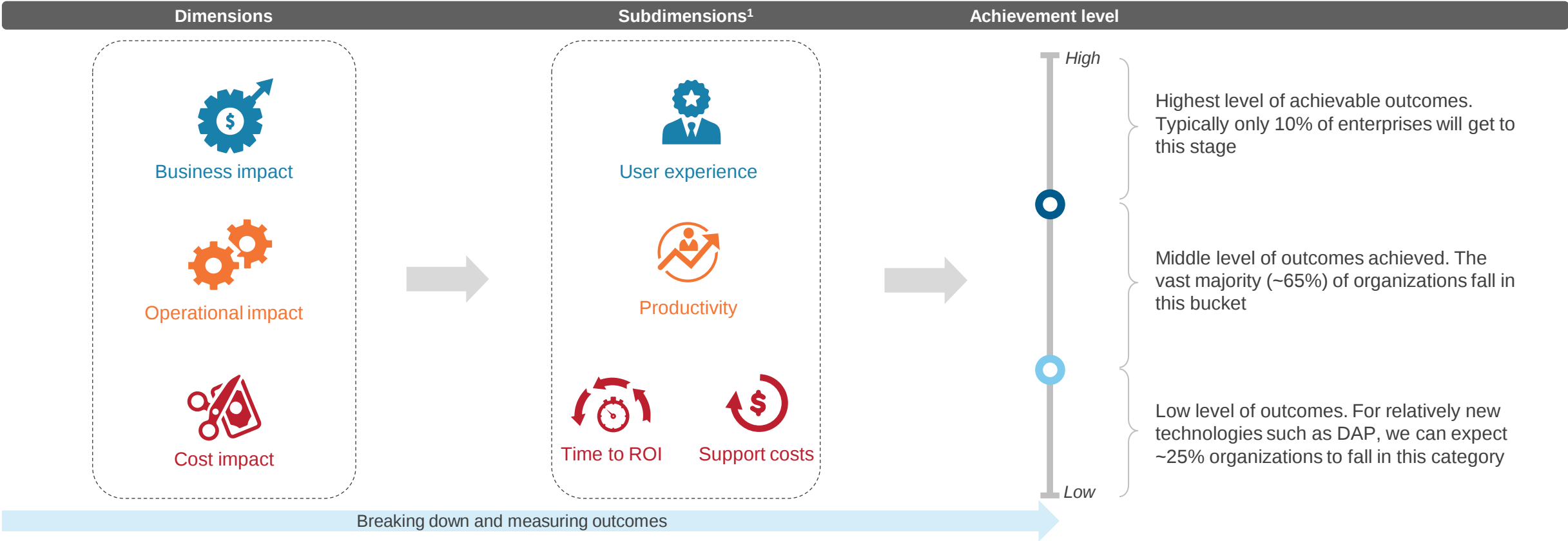
The Pinnacle Model® provides a framework to help enterprises measure the DAP journey’s current and target states, both in terms of outcomes and capabilities

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Everest Group Pinnacle Model® for mapping an enterprise’s journey to become a Pinnacle Enterprise™



Outcomes: Use the Pinnacle Enterprise® outcomes model to understand your current state and goals for the desired target state

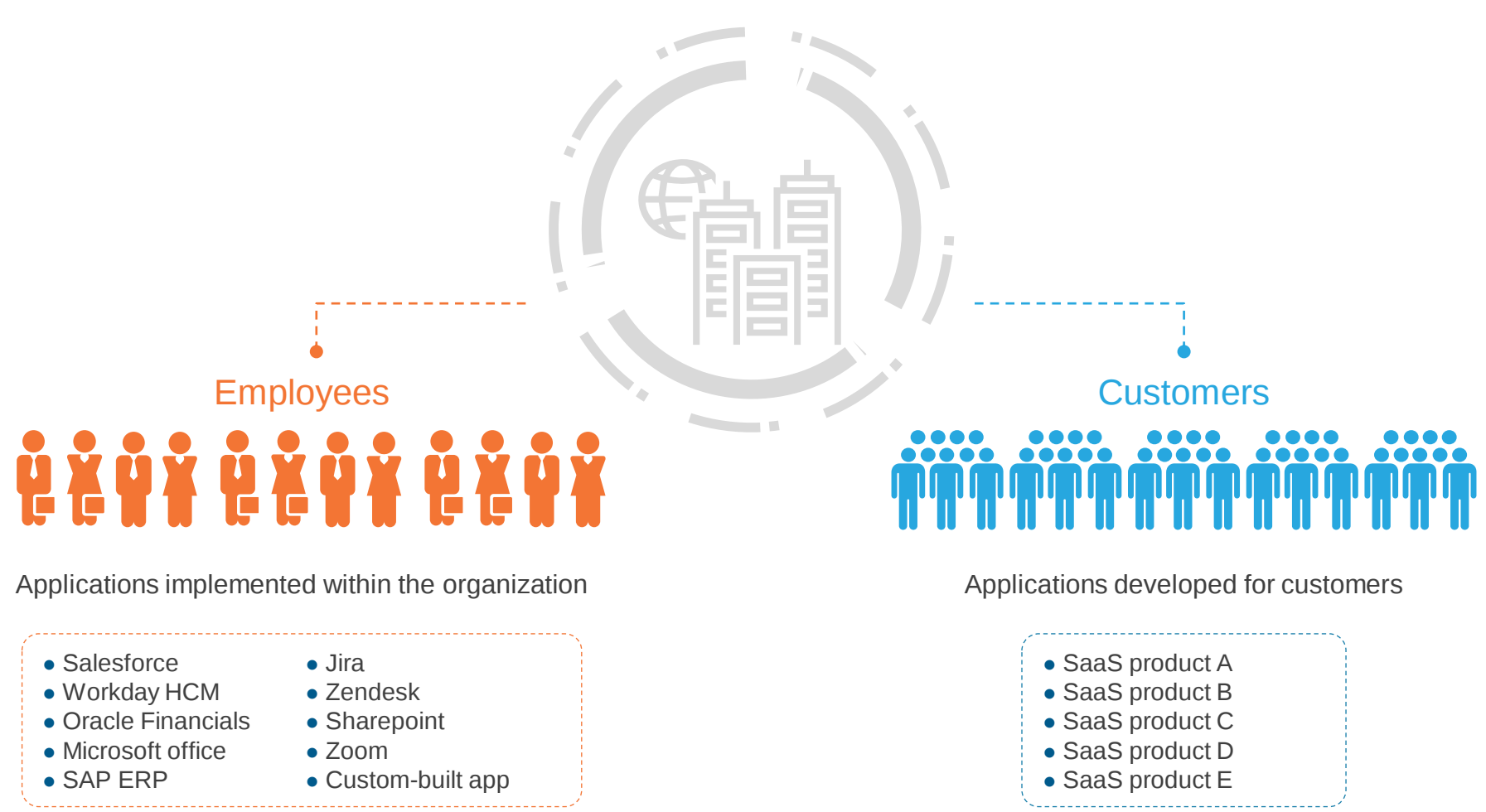


- Overall, we can measure the outcome through a combination of three factors: cost impact, operational impact, and business impact
- We can further break these down into subdimensions that fall into one of the three buckets depending on the level of the outcome achieved. The exact measure of outcomes will vary significantly by the scope of DAP implementation

¹ Not exhaustive

Illustration: Consider an organization evaluating its applications, including customer-facing and employee-facing applications, for DAP implementation

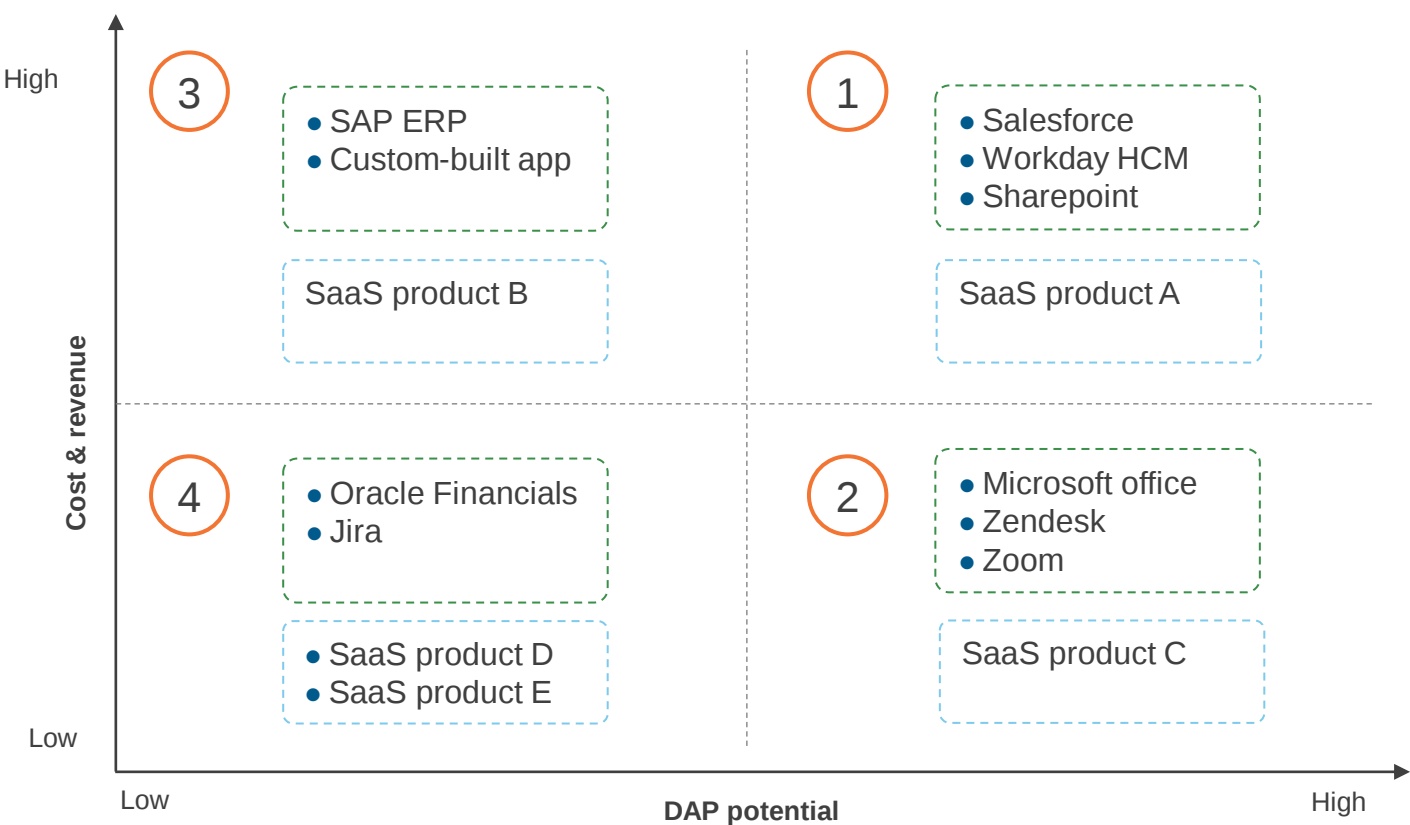
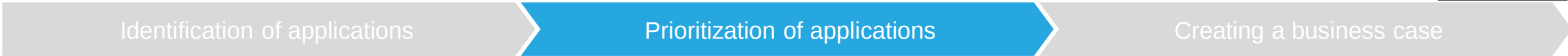
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Scenario: The organization is evaluating all its applications for DAP

Prioritization of all applications

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Employee-facing applications Customer-facing applications

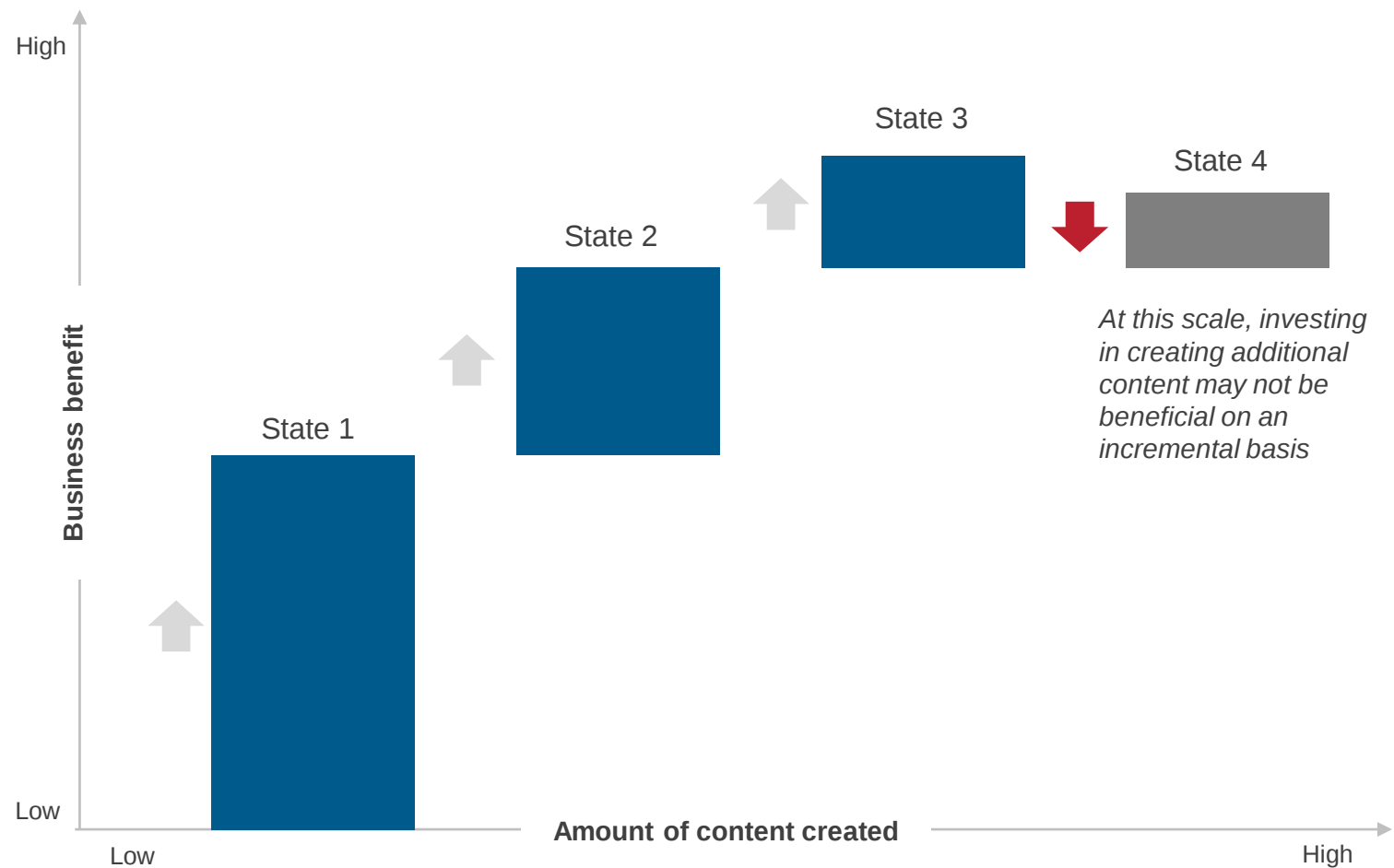
- When the organization is considering DAP implementation holistically, it should carry out the prioritization separately for each of the application category – employee/partner-facing and customer-facing – to identify the top applications within each category (as shown in pages 36 and 37 in the playbook)
- The enterprise can develop the consolidated view by grouping applications from the respective quadrants
- Once this view is generated, applications in the upper right quadrant should be considered for further evaluation

Considerations when creating a business case for the identified application

Enterprises need to target appropriate amount of content to be created, given the possibility of diminishing returns

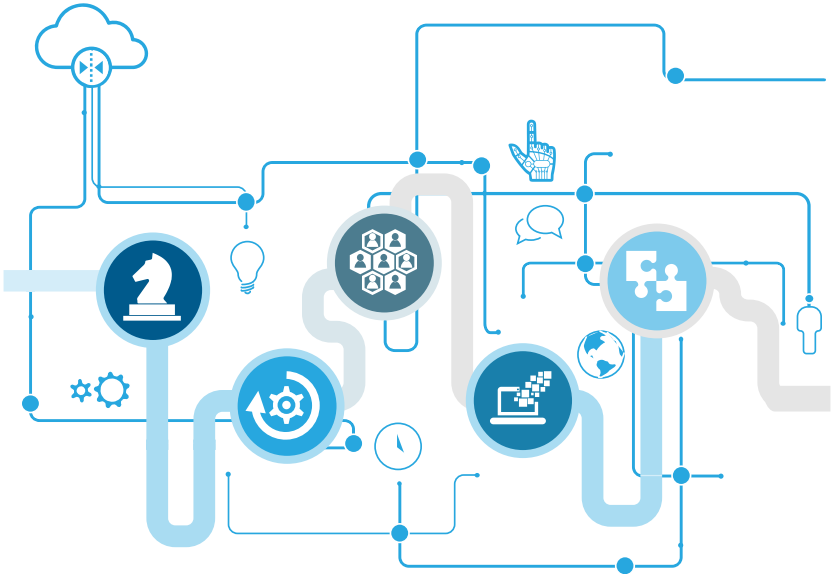
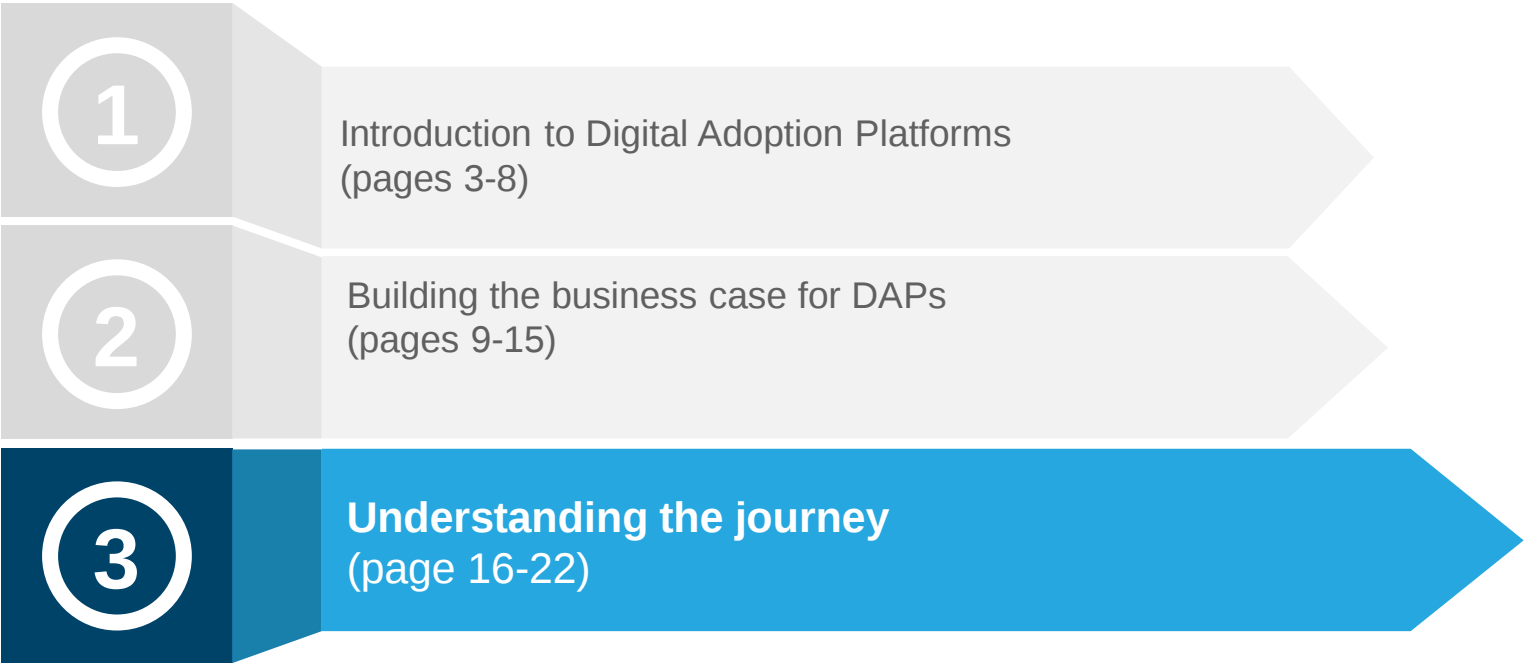
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Variation of business benefit with the amount of content created

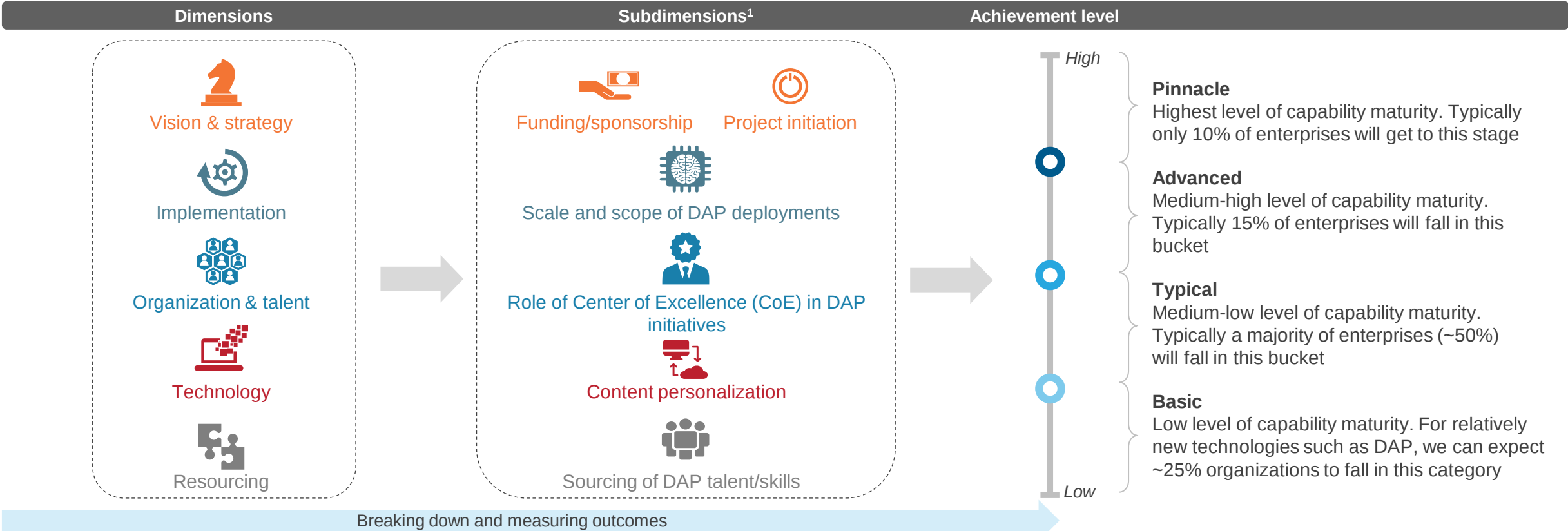


- In DAP initiatives, the business benefit for the enterprise will largely depend upon how much content (walkthroughs, self-help documents, tips, announcements, etc.) is being created
- As we move from one state to another, more content is created using the DAP. The time and cost to create content increases with all other costs (license, implementation, and maintenance) remaining static
- As we reach state 4, there is no incremental benefit achieved by creating more content. So, the amount of content created in state 3 will provide the maximum business benefit
- Hence, it becomes critical to understand the business benefits for different states to arrive at the state that provides the enterprise with the maximum benefit

Key contents of the DAP playbook



Capability: The Pinnacle Enterprises® Capability Maturity Model (CMM)¹ can help enterprises understand their current state of capabilities and subsequently where they want to get to

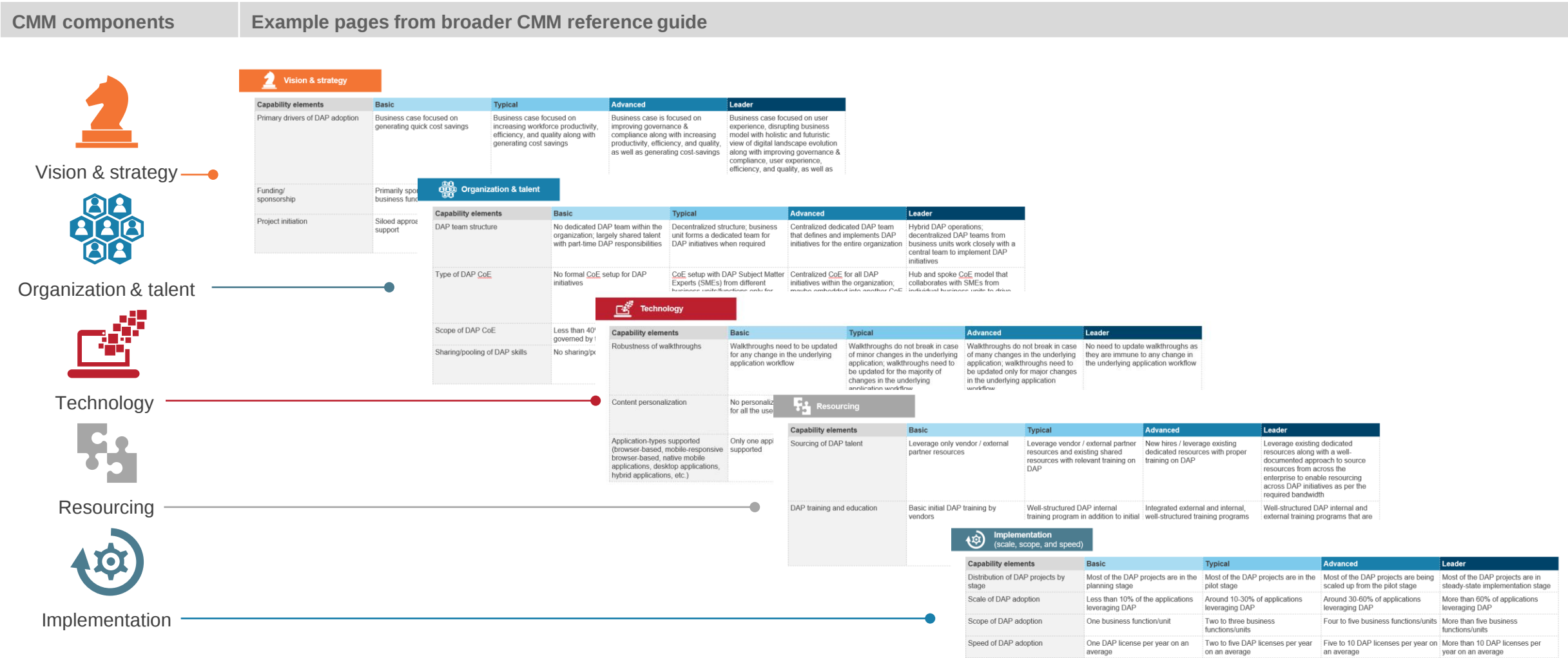


- Overall, capability is measured through a combination of five factors – vision & strategy, implementation, organization & talent, technology, and resourcing
- Each of these is further broken down into subdimensions, which can be measured as falling in one of the four buckets depending on the maturity level: basic, typical, advanced and pinnacle

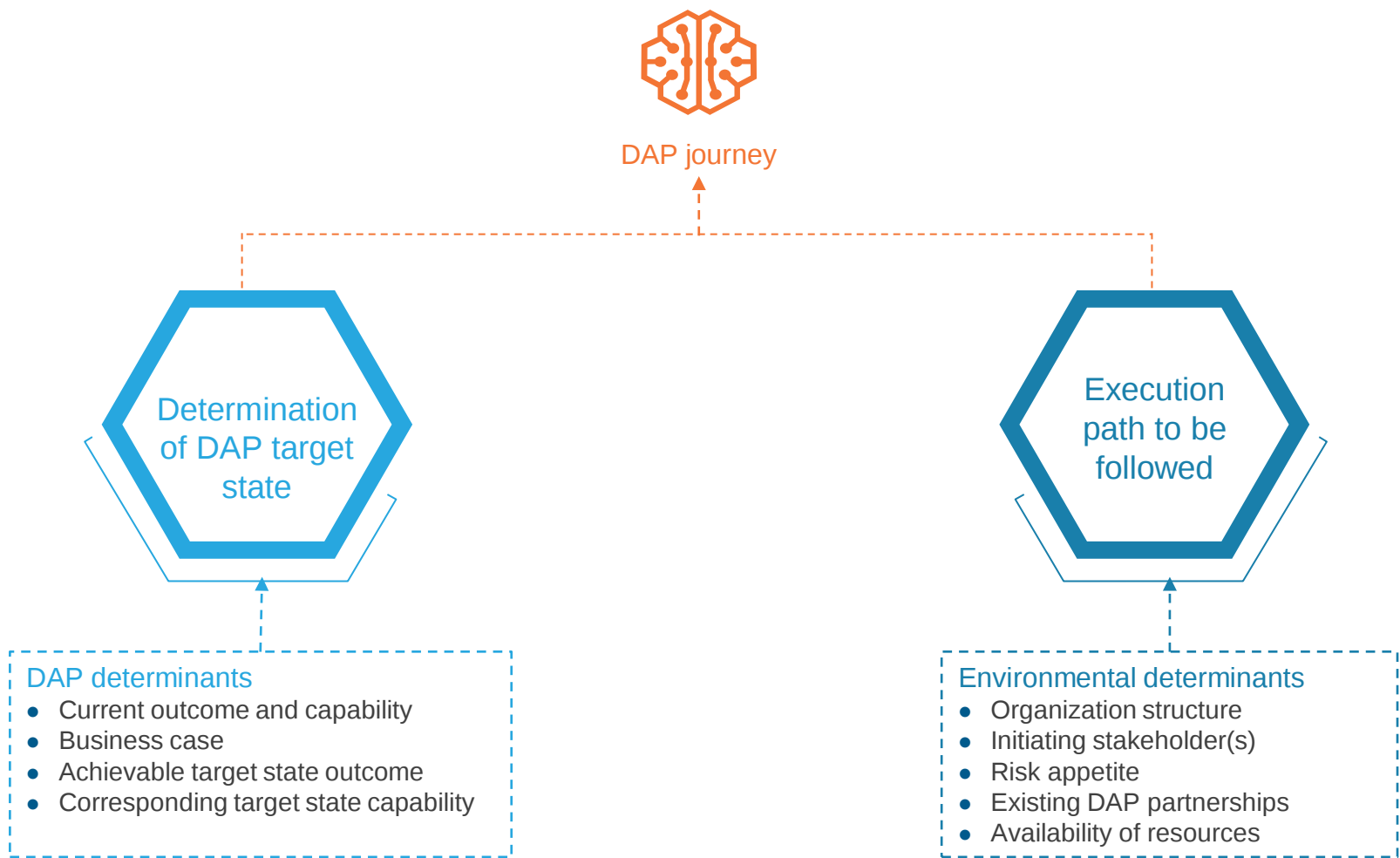
¹ Refer to pages 100-110 in the playbook for the detailed model, dimensions, and subdimensions

² Not exhaustive

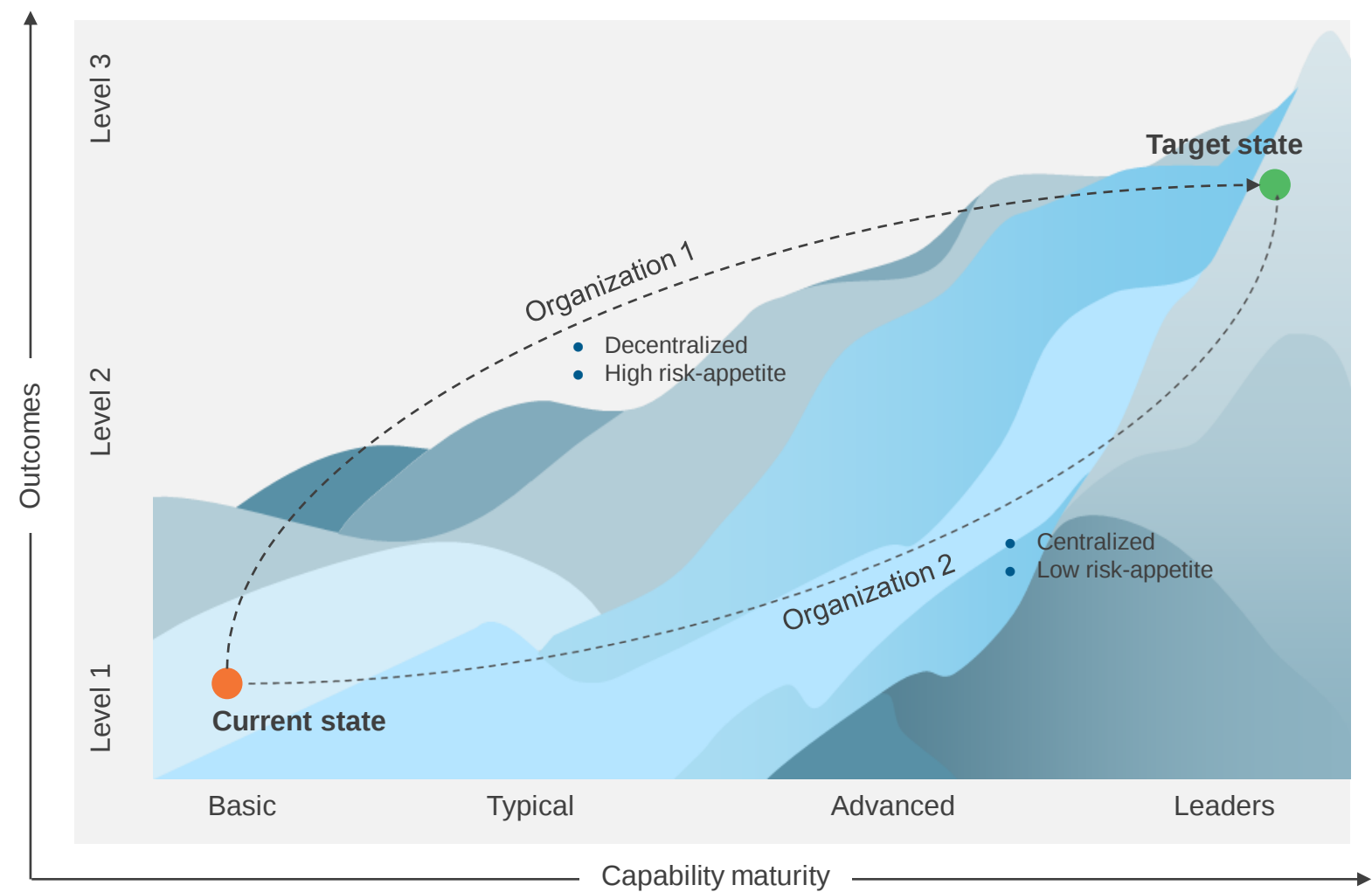
Everest Group organizes DAP capabilities according to five key components of enterprises' DAP journey



The DAP journey will take different forms based on two sets of determinants – DAP-related (science) and environmental (art)

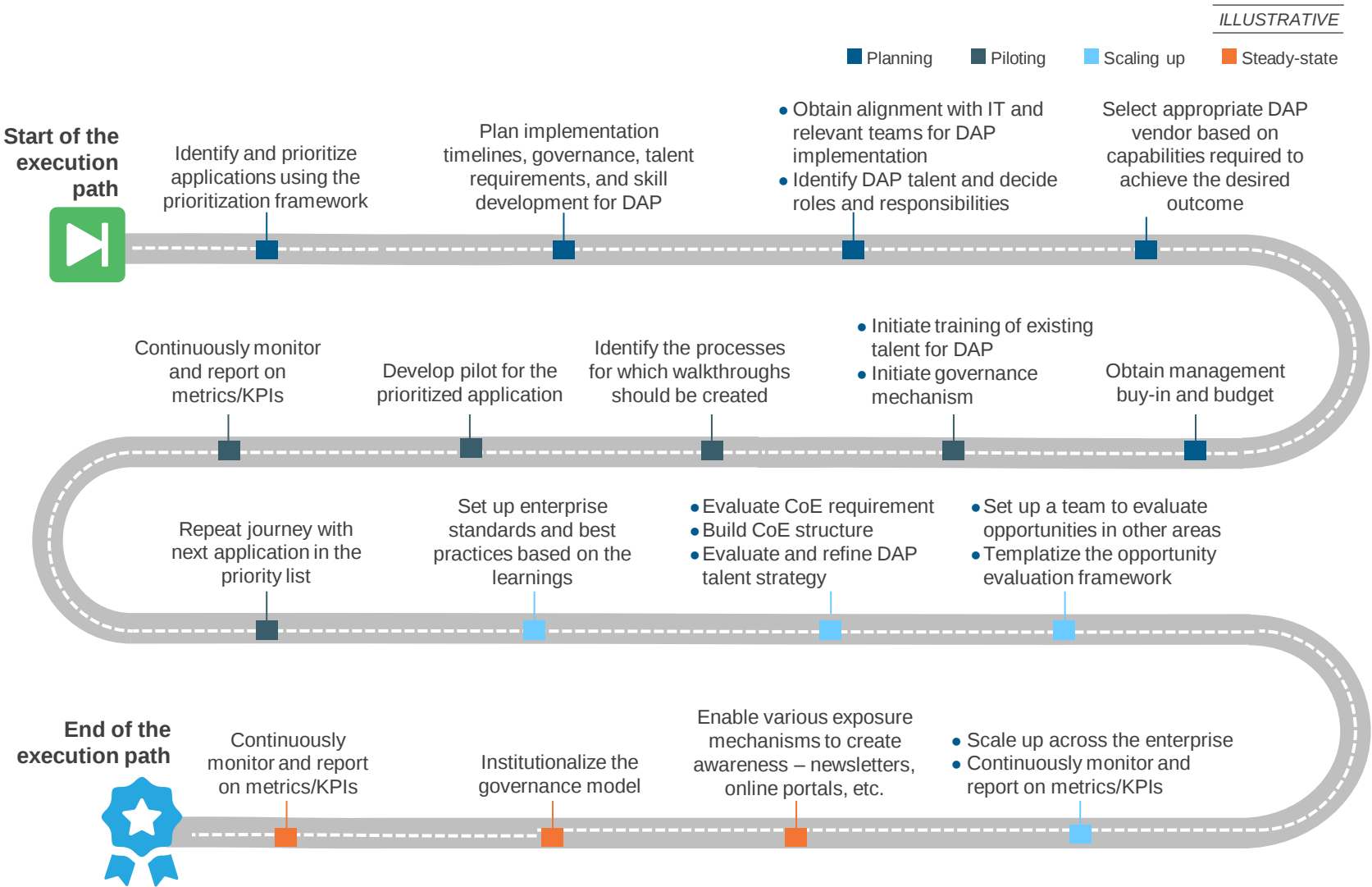


Given the same current and target states, enterprises’ culture, structure, and other environmental determinants influence the routes they take

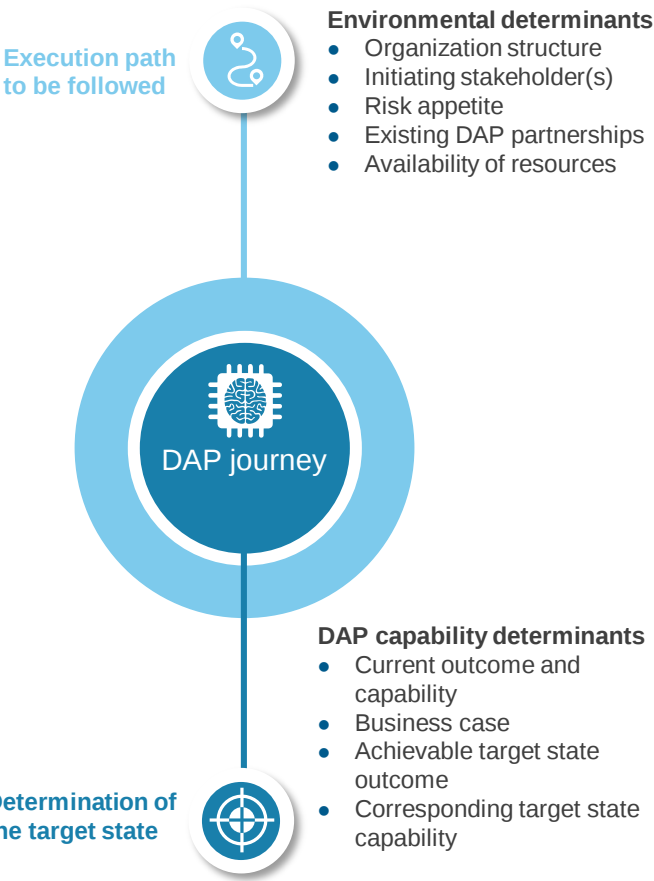


Two enterprises starting their journeys at the same low level of DAP maturity and wishing to reach the same advanced target state may take significantly different execution paths; the path would largely depend on environmental determinants.

The playbook helps your organization think about how to develop your DAP journey...



... the DAP journey can take different forms based on two determinants – capability-related and environmental



...and provides enterprise case studies highlighting their DAP journeys and the benefits realized from their DAP implementations

Digital Adoption Platform (DAP) Playbook

Case studies | Experian (page 1 of 2)

Enterprise overview

Established in 1996, Experian is a leading global information services company. Experian empowers consumers and clients to manage their data with confidence during life's big moments. The company helps individuals take financial control and access financial services, businesses to make smarter decisions, lenders to lend responsibly, and organizations to prevent identity fraud and crime. Experian has 17,800 people operating across 45 countries. It is listed on the London Stock Exchange (EXPN) and is a constituent of the FTSE 100 Index. To tackle Salesforce adoption issues and to support its training efforts, Experian started its DAP journey in 2017 with Whatfix to provide on-demand learning and self-service support to the sales department.

Drivers of adoption

Approach toward DAP initiatives

Current status of the DAP program

Future plans for the DAP journey

Challenges

Winning insights

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Digital Adoption Platform (DAP) Playbook

Case studies | Experian (page 2 of 2)

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Digital Adoption Platform (DAP) Playbook

Case studies | Sentry (page 1 of 2)

Enterprise overview

Sentry Insurance, a Fortune 1000 company, is one of the largest mutual insurance companies in the US. Its core business units provide industry-specific commercial insurance options. Sentry and its subsidiaries sell property and casualty insurance, life insurance, annuities, and retirement programs for businesses and individuals throughout the US. Founded in 1904, it is headquartered in Wisconsin and has a workforce of more than 4,000. Sentry started its DAP journey in 2017 to provide on-demand learning and self-help options to its users. At first, it started by leveraging DAP for their CRM application to provide its sales team with the relevant support, but over time, it partnered with Whatfix to add DAP to more applications, including both internal- and external-facing applications

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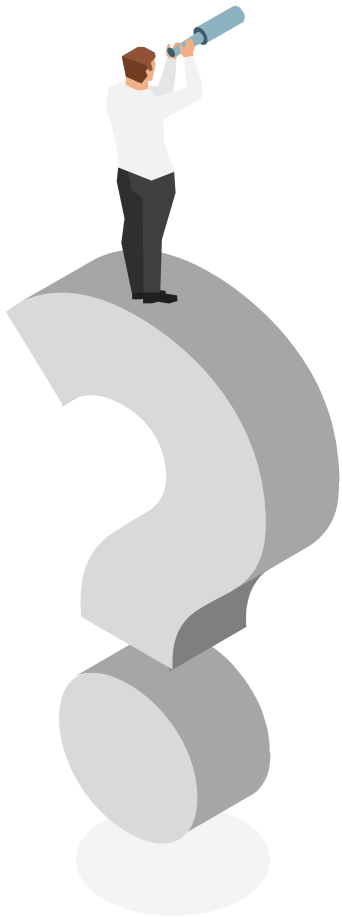
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What should executives do next?



Take a programmatic approach with a clearly defined vision, mission, and desired outcomes

- Assign a core team at the central level to develop a DAP strategy for the organization
- Ensure the strategy is corporate-wide and inclusive, with a clearly defined roadmap and approach to desired outcomes
- Be sure to
 - Understand the requirements and challenges in scaling up DAP across the organization such as talent, governance, and stakeholder involvement
 - Prioritize applications for DAP implementation and select a DAP vendor that will partner along the journey

Empower the organization to succeed with DAP initiatives

- Provide executive sponsorship and central help for DAP project funding and resourcing
- Support the respective team/stakeholders to work through organizational challenges and barriers to deployment
- Develop an organizational culture that embraces innovation

Aim to be a best-in-class, or a Pinnacle Enterprise™¹, in DAP

- Build DAP capability with the goal of achieving business outcomes and growth
- Ensure that the organization follows best practices

The rest of this playbook provides you with insights, methodology, and guidance to help your organization develop successful strategies for adopting DAP

1 As described on page 11 of this document



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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

New York

info@everestgrp.com

+1-646-805-4000

Toronto

canada@everestgrp.com

+1-416-388-6765

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