Coverage Initiation: Skyllful offers a cloud-based, mobile-first DAP for frontline and field workers

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Unlike other digital adoption platform providers that focus on desktop applications, Skyllful focuses on the mobile apps and handheld devices that make up the tooling ecosystems for field workers and frontline employees. The startup offers on-demand, on-device training for delivery drivers, retail workers, utility technicians and more.

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Introduction

As organizations begin to embrace the idea that every company is a technology company, many have begun looking to tools that support their adoption of new software, applications and services to ease the transition. These digital adoption platform (DAP) tools are often focused on desktop work and help end users more quickly adopt newly deployed technologies or pick up on recently updated work processes.

The growth of DAP is great for traditional knowledge work employees, but field and service workers often have unique challenges that make these tools not always the best fit. That's the idea behind Skyllful, a mobile-focused DAP specialist that is looking to accelerate the adoption of new applications and hardware for workers like truck drivers, retail employees, service technicians and more. The firm's mobile DAP has an on-device application simulator that guides users through application adoption and training, while offering a custom content design studio and performance analytics as well.

451 TAKE

Skyllful has adopted a unique approach to the digital adoption platform market with a mobile offering geared primarily toward frontline employees and field workers. The core value proposition of its platform is that it is mobile-first and delivers scenario-based app simulators on the end user's device – which is typically not a desktop. While blue-collar and field workers are often underserved in the market, Skyllful's current core differentiator of being mobile-first and targeting personas associated with those aforementioned user types may not stand up to the rapid growth and expansion of the broader DAP sector if the startup doesn't remain nimble and continue to innovate. That said, Skyllful has a smart partner strategy that could easily be leveraged to bolster its go-to-market efforts and could pursue additional route to market via skilled trades and labor unions.

Context

Originally founded as Venado Technologies by Justin Lake and Ralph Hubregsen in 2015, the business was rebranded as Skyllful in May 2020. At its start, Venado was a custom app developer and consultancy, but rebranded as Skyllful after its founders identified a gap in the market for learning and development (L&D) and DAP for frontline and blue-collar workers. Skyllful designed its offering for workers who meet that criteria – delivery reps, truck drivers, retail employees, electric and gas technicians, warehouse workers, and maintenance and repair technicians.

The company is headquartered in Denver, with most of its staff based out of its Plano, Texas, customer experience center. Customers include Nestle, CBRE, Dairy Farmers of America and CFM Materials.

Products

The Skyllful platform has three main components. The first is the Skyllful Simulator, which is the training, guidance and coaching tool. Through the Simulator, field and mobile workers access on-device training content and lessons to ease their adoption of new software, applications or processes. This is to help train employees and fill skills gaps but can also be used in new hire onboarding.

Custom app simulations are created within the Skyllful Studio component. Within the Studio, creators get help designing their learning curriculum by role, including developing screens, selecting interactive app controls, and assigning steps for on-device lessons. We see this as having potential to bring the learning experience platform differentiator of custom content and curricula to frontline and blue-collar workers, which could deepen engagement from the workforce knowing that expert peers or other colleagues designed the content in question.

For managers and leaders, performance analytics are available via Skyllful IQ. This helps customers view program and user readiness at a high-level glance, but also can be segmented by role, team or geography to identify potential bottlenecks or skills gaps. This could be used in conjunction with Studio to create content that addresses the gaps found in IQ.

For training and guidance, Skyllful can work with any application, whether off-the-shelf or custom/ internal. The Simulator resides on the end user's device to both serve the lesson content and measure performance.

Strategy

The platform is licensed on a per-learner, per-year basis. The learner license provides access to unlimited applications and multilanguage support, and pricing is tiered depending on the number of learners on the platform. The license also includes unlimited users on Skyllful IQ, the performance management and analytics tool. Content development services can be bundled into a subscription or purchased a la carte.

A broad partner ecosystem adds to Skyllful's platform approach. Device and hardware partners/ integrations are big, given the prevalence of purpose-built (often ruggedized) devices deployed in the field. Mobile MSPs are another partner angle for the firm, as are software vendors. Skyllful also works with content developers and instructional design firms on its content, primarily via its Studio content creation tools.

Financial

Skyllful is a privately held company and doesn't publicly disclose its financials. However, based on our analysis, we estimate the firm is on track for a 2020 annual recurring revenue of $500,000-1.5m. We do know that Skyllful is self-funded and profitable.

Competition

While Skyllful probably competes with DIY efforts involving Microsoft PowerPoint, it likely encounters larger DAP and user journey vendors such as WalkMe, Whatfix, AppLearn and Pendo. Another interesting vector of competition could come from SMS learning platform specialists like Arist. Additionally, mobile learning software providers that cater to organizations looking to offer tools for frontline or distributed workers could also be competitive to Skyllful. Examples of players in this segment include Grovo, Qstream, Axonify and Rallyware.

SWOT Analysis

STRENGTHS

Skyllful is filling a gap in the DAP market for frontline and field worker use cases, with a clear value proposition. The firm has identified buyer personas in its target segments that align well with its mission and has a strategic partner ecosystem that will support future growth.

WEAKNESSES

The company is still in its early days following its rebrand in 2020. Skyllful does speak to other personas, including IT, but could also include HR in its messaging – especially when targeting L&D use cases. We also believe it could do better to bifurcate its value proposition across new employee onboarding and upskilling/reskilling of existing employees in digital transformation.

OPPORTUNITIES

There are opportunities in the partner ecosystem – especially among hardware vendors and content developers – for Skyllful to expand its reach and possibly partner more deeply on go-to-market initiatives or channel sales. We also believe there is an opportunity in the marketing to address the impact of COVID-19 and establish Skyllful as a trusted partner in the transition to the 'new normal.'

THREATS

Streamlined options like Arist's SMS tool are a threat for the sake of their simplicity. More established DAP players like WalkMe or Whatfix playing downstream or cross-market into Skyllful's space is also a threat. Of course, as apps themselves become more customized, automated and contextual, that also presents a threat.