

Introduction: The Collaboration Market Is Shifting, The Role of Communities

The collaboration market has evolved significantly over the last several years. Today video meetings and messaging are becoming the de facto way for individuals and teams to collaborate and communicate. Communities, which have evolved from social networks, have historically supported the idea of broader knowledge sharing that can be team, group, or enterprise-based and involve customers and partners. The collaboration market has focused more on what teams need, but the broader organization is about communities. This Aragon Research Globe discusses the shift in the market and evaluates 12 providers of enterprise communities.

Today, communities have evolved and can be general or purpose built. General knowledge sharing is giving way to a more focused approach to deliver better journeys for employees, prospects, customers, and partners. One of the big pivots in this market is the rise of digital work hubs, which combine work tools with work updates (see below).

Intranets Shift to Focus on Employee Experience

Intranets are still popular as a communication platform, but there is a big shift to focus on overall employee engagement—that starts with a better experience. It states with the need to communicate more effectively and in more real-time with associates. Employee experience communities now have more ways of pushing information to associates with integrations with team collaboration and other in-app notification techniques.

For both internal and external use cases, it is more about experience and the ease of accessing information. Having multiple ways to communicate information is also critical. This internal shift to integrated digital work hubs means that integrations with related workplace tools such as meetings becomes an imperative. The imperative for automating work means that work hubs are becoming engagement centers for sharing knowledge, which has always been the long-term goal of an ESN.

Customer Communities and the Growing Demand for a Better Experience

Today, if there is one growing need in the market, it is the need for a better customer experience. Bringing customers together in a community is one of the ways to accomplish that. Customer communities are being redesigned to offer the best experiences and with AI to offer the right content at the right time to allow information to flow freely and to save people time.

Providing better customer experiences today at all phases of the customer lifecycle is one of the top issues for enterprises today. While a community acts as a knowledge network that combines content, information, and tacit knowledge (expertise that people know), modern communities are about offering the best possible customer journey.

Customer experience continues to be one of the key issues. Today enterprises have two choices for communities: some providers focus on internal communities and other providers are focused on external communities. There are also some that do both.



Figure 1: Some of the basic capabilities of modern community platforms.

Trends in the Workplace: The Future of Work Is Remote, Collaborative, and Intelligent

Work and the workplace are changing for professionals who use specialized knowledge to solve problems. These “knowledge workers” use intellectual capital to create competitive advantage and value.

Three major trends are contributing to the need for enterprises to provide digital work hubs for their knowledge workers:

- Knowledge workers are now remote due to the risks of COVID-19. They are now working from home and Aragon estimates that 30% of them will work remotely permanently.
- Knowledge workers require collaboration and communication tools to support mobile work. Increasingly, the need for teams to take advantage of work hubs is growing. The simple issue of everyone having access to the right content at the same time is non-trivial.

- Intelligent applications represent the new race. Enterprises need to understand and then leverage these technologies—from advanced analytics to natural language processing—to capture and refine corporate knowledge and to make better decisions.

Work is now done on multiple devices and, for many, the need to continue work on a mobile device that was started on a PC is becoming a growing need. For some users, a laptop isn't an option, so work needs to be able to be completed on a large phone or tablet.

In fact, for repeatable processes, it is becoming easier to develop an app that can be deployed to associates in rapid fashion. With these intelligent apps will also come intelligent assistants that can complete tasks for people.

Succeeding at Remote Work Using Collaboration

We are in an era of remote work, and with that comes the need to collaborate. This means investing in tools that provide different forms of collaboration. Many of the providers in this report have strong collaboration features. Some partner for capabilities. The reality is that team collaboration is often a great set of capabilities for people to use to collaborate and communicate. Full-blown meetings, also called web and video conferencing, is also a requirement for remote workers.

Team collaboration, given its real-time nature, offers a more modern way of getting work done than the old standard of email. Task- and project-oriented tools also offer collaboration, but for many teams who are not together, they may require a communications-led work hub, along with a room- or spaces-based work hub where content is created, stored, shared, and updated.

Intelligence Becomes Part of Digital Work

While the physical workplace changed significantly this year during COVID-19, the other big change was the quiet infusion of intelligence into digital work hubs. Digital assistants such as the Webex assistant are now helping people run their meetings and take notes. Email applications such as Outlook and Gmail can already predict what you're going to say. Additionally, predictive analytics and intelligent content analytics are both real and being offered by a number of providers such as Dropbox and Microsoft.

The Need and the Growing Demand for Video Content

Just a few years ago, sharing video in communities was cumbersome. Now, live broadcasts are here, as is the ability to share short and long video files. With billions of videos a day shared on consumer social media platforms, the need for quality video content is expected to grow by ten times over the next five years. The reason for the demand for video is simple: video conveys more information faster that is also remembered longer. It is also more pleasing to interact with, which results in increased loyalty to the enterprise by both customers and employees.

Today many Community providers partner for live broadcasts with providers such as BlueJeans, Cisco, and Zoom. They also often support integrations with Kaltura, KZO, Panopto, Qumu, VBrick, uStudio, and Vimeo for sharing video content. Asking providers for their plans to offer enhanced

video support and integrations should be a top priority for enterprise buyers.

Conversational AI and Chatbots—Coming to a Community Near You

Digital labor, which is the term Aragon uses for chat bots and virtual agents, is here. There are many use cases for digital labor. They can be used for data entry, for warehouse operations by a robot, or in call centers to solve the problems that humans are having with a particular product or service. There are also increasing cases of AI-enabled agents assisting humans to complete highly complex activities such as surgeries, aviation activities, and processes in pharma/chemistry.

For communities, question and answer virtual agents is the fastest and easiest way to turbo charge a community. Q&A virtual agents speed up the effectiveness of a community due to the fact that a bot can find the answers to questions fast. This then enhances customer satisfaction.

Digital Work Hubs Come of Age

There is no doubt that work hubs have come of age and that enterprises are looking for more of these tools to help individual teams get their work done. We are seeing more adoption at the team level than at the enterprise level, however, and some enterprises have started to standardize on the basis of a specific type of work across multiple divisions.

Due to entrenched work processes, we expect there to be multiple work hubs in the enterprise. The ability to integrate third-party apps and third-party processes as well as content is one of the deciding factors when selecting a provider.

The full set of capabilities required for such a platform is dictated by the use case, and may differ by industry, role, or business function. The core capabilities outlined in this report may be augmented by use case specific add-ons that integrate with the platform via APIs.

Content Analytics Comes Online

In 2021, content analytics, which gives users an algorithm to read and understand both documents and text, has come online, but not in every offering. Right now, many providers are just beginning to talk about the roadmaps that would allow for the inclusion of better content analytics.

Prescriptive analytics go further and recommend actions. As the digital work hub category matures, products will use predictive and prescriptive analytics to help users become more productive and to provide evidence-based guidance for future activities. Providing communications and content management in a consistent environment with modern analytics tools to create additional value from content is a winning combination.

For example, Microsoft just announced SharePoint Syntex, which will allow for the reading and understanding of documents stored in Microsoft SharePoint. Dropbox has also been investing in image analytics for its workspace offering. Google has a large amount of AI investment in Google Cloud and it is gradually making those features available in Google Workspace

Intelligent Work Hubs Are Still Evolving

While AI is coming online for selected features and to track content, the lack of virtual agents and overall intelligence at the platform level makes the idea of organizing work—collaboration and content—still dependent on humans. We do think this is an area where more intelligence will come online, but not until 2023 to 2025.

The Community Market and How it Evolves

The community market has bifurcated and that means enterprises often have two different platforms for employee and customer engagement experience. The good news for the enterprise is that communities really come down to 2 basic focus areas with equal priority being given to both employee and customer engagement. While a few providers such as Microsoft and Salesforce enable both internal and external communities, most providers tend to focus on one of the two use cases, even though the technology is fundamentally the same.

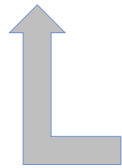
So, for now, the market is split between both use cases. For sales, deal room communities are one of the ways for employees and customers to collaborate around the same content.

A Dual Enterprise Strategy: Employee Experience and Customer Experience

Enterprises now need to realize that for communities there are really two major audiences: employees and customers. Intranets are now giving way to employee engagement/experience offerings. Communication and learning are a big part of that new experience. While deal rooms for sales teams allow for direct customer engagement, the vast majority of providers offer either employee focused communities or customer focused ones.

Customer communities can now be more easily used to create unique customer experiences and a more tailored journey—whether it be in early stages of customer engagement or in the more popular customer support. In many industries communities are allowing customers to engage with each other—and it is often tied to an interest in a company or a set of products or a cause—such as recreation or cars, and personal health or a health topic.

Customer Experience



Employee Experience



Figure 2: Enterprises should focus on both employee communities and ones that engage customers.

Experiences and Outcomes

When deciding on a community and how it will be used, there are several critical questions that need to be answered. Some basic functionalities for ensuring that communities deliver answers are key. Here are some examples of questions that need to be answered as the community is designed:

- Are customers receiving the product and product operation answers they need?
- Can sales professionals collaborate with a customer and secure deals?
- Can the community deliver learning to employees and customers?
- Which person in the community can help me get an answer?

Communities are ideal for large groups where lots of information needs to be shared. Content is the currency of knowledge, as is expertise. People graphs will increasingly be used to deliver insights and connect people together. As intelligence plays a larger role in communities, enterprises should ask providers for their roadmaps to make their platforms more intelligent, so that insights can be delivered faster.

Because of the driving need to deliver knowledge to users, communities will need to get smarter and do so rapidly. As mentioned earlier in this report, one of the fast ways to deliver knowledge is to use chatbots and virtual agents.

The Aragon Research Globe™ for Communities, 2021

(As of March 9, 2021)

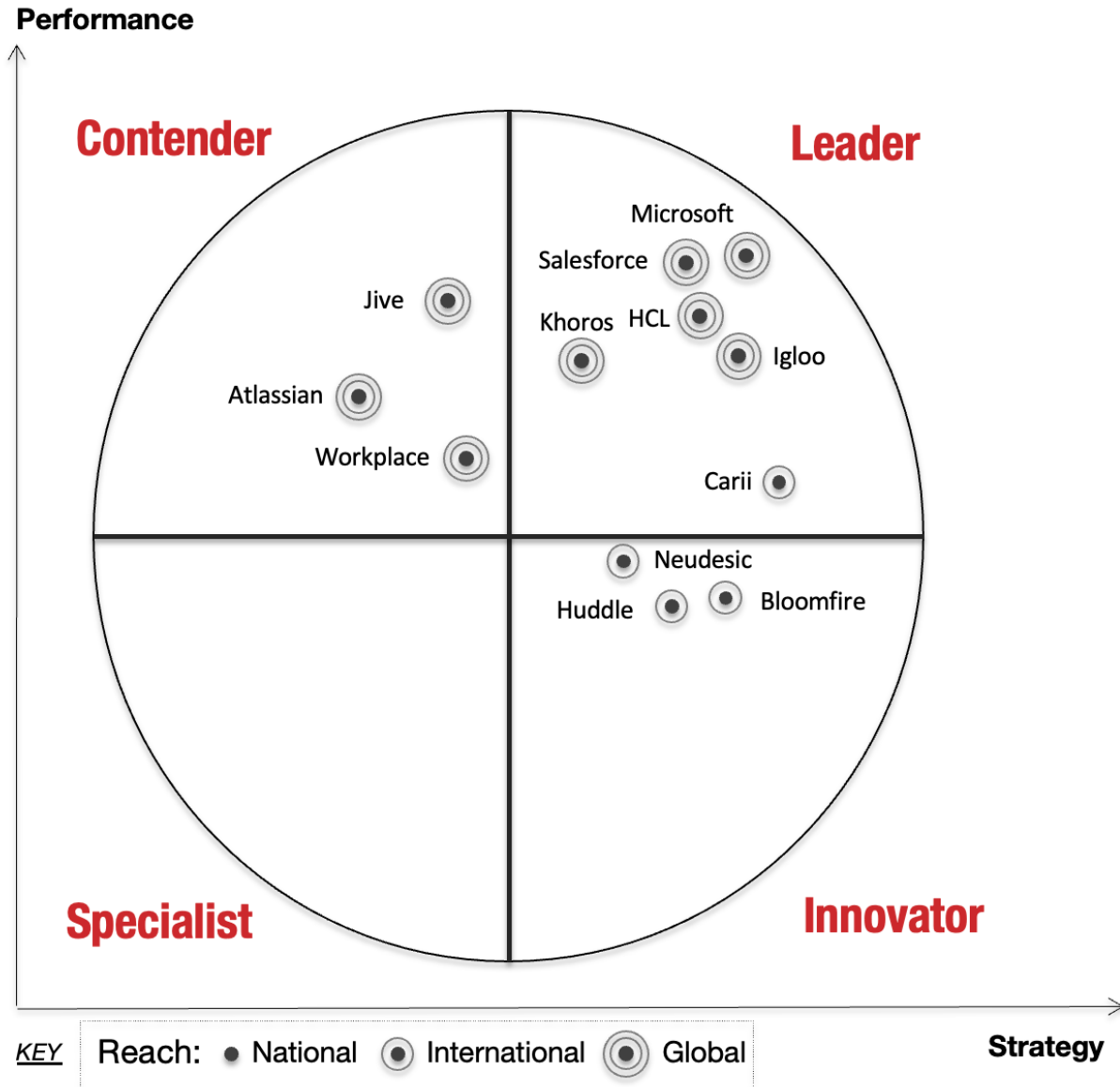


Figure 3: The Aragon Research Globe™ for Communities, 2021.

Leaders

Carii

Carii, based in New Jersey, and led by CEO Denise Hayman-Loa, offers a community platform called Connective. The Connective brand was launched in 2020 and has helped Carii to continue to grow its offering and its industry solutions. Connective is a fully featured community platform that can be used for internal and external communities. It offers a set of compelling features such as experience builder, sponsored advertising, and fundraising that will appeal to both commercial and non-profit enterprises.

In 2020 Carii announced new features that will help both internal and external communities. First it added Actions and Projects so that teams can manage work projects with kanban style project dashboards. It also announced that it has added integrated video conferencing for most of its commercial plan offerings. Carii also offers a native mobile app so users can interact with their community on the go. Carii's organic method of connecting individuals and teams around the world make communities more engaging. All of this combined makes Carii one to watch.

Strengths

- Features
- Integrated video meetings and events
- Mobile collaboration & chat
- Internal and external communities
- Advertising support

Challenges

- Market awareness

HCL

HCL Software acquired most of the collaboration-related assets of IBM Software group in a deal that closed in July 2019. This included Connections, its communities offering that focuses on intranets and digital work. Connections has a large install base globally, and as part of HCL Connections has continued to evolve to help support remote work and employee engagement. The Orient Me homepage uses AI to help organize the information being presented and users have several choices on how to organize content and posts. HCL Connections Touchpoint makes onboarding new employees easier.

HCL has made digital work a key aspect of Connections. Its Huddo Activities Plus feature allows teams to keep track of tasks and activities. Huddo allows for easy-to-see color coding on projects and tasks. With all of Huddo's capabilities combined with all of the other features of Connections, the platform provides a complete digital work hub that enables the entire enterprise to participate in a large community—but also have things organized in smaller team level groups. Finally, Connections can also integrate with third party applications, such as Slack and the Microsoft ecosystem, including Teams, SharePoint, Outlook and Office, as well as HCL applications such as Domino, Sametime and Domino Volt to enable even higher levels of data and application integration and low-code development. HCL has not missed a beat, and Connections, along with the rest of its portfolio, is well positioned to meet the demands of the remote work era.

Strengths

- Global presence
- Predictive analytics capabilities
- Content management
- Mobile capabilities

Challenges

- Market awareness outside of install base

Igloo

Igloo recently announced the addition of CEO Mike Gaburo who will continue to drive growth with a focus on customer engagement and product innovation. Igloo brings over 12 years of experience addressing challenges related to corporate communications, collaboration, knowledge management, and user engagement. Their evolution goes beyond technology with a recognized approach to digital workplace solutions, a Digital Workplace Playbook, comprehensive professional services portfolio with supporting in-house experts.

Igloo offers customers improved time-to-value with over 30 solution templates for common use cases such as the Newsroom, Team Room, Policy Center, Communities of Interest and more. These solutions are pre-configured with a recommended architecture, permissions and functionality while also allowing for flexibility to modify them to meet unique customer needs.

Integrations, which are seamlessly incorporated into solutions, display information from external tools while providing an optimal user experience. As a Microsoft Gold Partner, they connect with O365 tools (e.g., SharePoint Online, Azure AD, OneNote, OneDrive, Outlook and Teams). They also offer integrations to other technologies such as Box, Dropbox, ServiceNow, Slack, Workday, Google, Zendesk and Salesforce.

Today, Igloo supports organizations in over 80 countries with a strong enterprise presence in industries such as education, finance, healthcare, high-tech, and professional services.

Strengths

- Focus on use cases / business solutions
- Ease of use
- Microsoft Office 365 integration
- Customer support and satisfaction
- Ease of deployment

Challenges

- Market Awareness outside of North America

Microsoft

Microsoft has continued to invest in Collaboration with Microsoft 365 and its flagship community platform Yammer. Yammer has had a complete makeover in 2020 that provides for a modern experience that also integrates with the rest of the Office 365 portfolio including Teams, Stream and SharePoint, Outlook, and OneDrive. Communities are also deeply integrated with Outlook. Users receive interactive notifications of announcements and conversations that matter; and users can view, engage with, and reply to posts without leaving their inbox. Office 365 Video is being migrated to Stream which will be treated as a standard content object within Microsoft 365.

Yammer works well with Microsoft Teams, which is now even more fully-featured. Yammer also leverages tight integrations with Microsoft SharePoint and OneDrive. Microsoft Teams continues to be the lead work hub offering from Microsoft, with the exception of Yammer, its community offering that has continued to attract more enterprises. Yammer also now supports the broadcast of live events right inside of the Yammer Community.

For Communities powered by Yammer, Microsoft Teams users can pin the Community on the left-hand side of the Teams interface. Sharing content is getting embedded into work processes—putting OneDrive and SharePoint in the background. Microsoft has some work to do with its new approach to Microsoft Stream—the intelligent video app in Microsoft 365, which is undergoing some architectural shifts to store all video and audio files on the SharePoint files platform within Microsoft 365 like all other file types. Microsoft has continued to enhance Yammer and add robust features to Microsoft 365, which provides choice to enterprises on how they want to organize their work.

Strengths

- Office 365 integration—Office Documents
- Integration with Microsoft Teams
- Ease of use
- Creating external communities
- Security
- Large install base

Challenges

- Balancing focus on Teams and Yammer

Salesforce

Salesforce, a leader in sales and service CRM, has shifted its focus to both industries and what it calls Customer 360. It has a dual product strategy. It offers Salesforce Experience Cloud, formerly Communities, for enterprises that want to build full-fledged communities for customer support, partner portals or a customer account community. Salesforce Anywhere is focused on being a work hub for CRM. Salesforce Anywhere is focused on connecting sales and service teams in real-time inside CRM by transforming sales processes with embedded documents and spreadsheets. It also offers chat, which runs alongside Salesforce Anywhere Docs or Spreadsheets.

Salesforce Experience Cloud makes it easy to build a community. Its Experience Builder tool, which enables users to design custom branded websites that are mobile-responsive, has received updates that improve its capabilities. Additionally, its services are being geared to support high-scale content. It offers an accelerated fast start deployment that leverages pre-packaged themes and a pick list of integrations to leverage. With easy connections to data, via MuleSoft and APIs, a Community can be launched fairly quickly. Its suite of enterprise solutions is now more capable for composing and delivering emails throughout enterprise communities.

With Experience Cloud and Salesforce Anywhere, Salesforce is well positioned to deliver both basic and advanced customer communities and work hubs for employees.

Strengths

- Mobile support
- Ease of use and functionality
- Analytics
- Ecosystem of partners
- Ease of building a base of community

Challenges

- Pricing for Communities

Khoros

Khoros, based in Austin and led by CEO Jack Blaha is a provider of Customer and Employee Communities, which is still the main offering in its portfolio of solutions for both customer care and marketing. In January 2021, Khoros acquired Flow.ai to enhance its capabilities in Conversational AI particularly for customer care and Topbox to add NLP and speech/text analytics to provide customer experience insights. Khoros offers chat bots for Facebook, WhatsApp and now for Khoros.

The Khoros platform is a unified context for customer engagement and enterprise community development. It features omnichannel support for contacting customers via branded communities that can communicate information to key stakeholders. It supports multiple languages and possesses configurable permissions making it scalable for differently sized enterprises and can accommodate complex business ecosystems with sophisticated role management for public, customer, partner, and employee collaboration. Its community dashboards enable moderation alongside analytics about visitors and benchmarks related to performance. Its solution also features gamification designed to reward customers for repeated, desirable engagement, which can help drive brand loyalty.

Strengths

- Customer and support communities
- Marketing solutions
- Gamification of the experience
- Brand awareness

Challenges

- Balancing communities with social marketing focus

Contenders

Atlassian

Atlassian has focused on product development within the enterprise and collaboration. Its two offerings are Confluence for document-based collaboration and Trello, Atlassian's work management offering. Trello got its start by focusing on team-based tasks. Trello works by having a Board with Cards that are work elements. Cards can contain people, content, due dates, and more. In July 2020, Trello added a spreadsheet-like view to its Boards, giving users a different way to view data.

Project-based teams have traditionally used the Atlassian Confluence product for content creation and sharing. Recently, Confluence has been updated to provide support for work-from-home teams. Atlassian has worked to provide collaboration solutions that can help enterprises adjust to the world of COVID-19. Confluence has a growing ecosystem and we do tend to find large pockets of deployments in enterprises, partially due to its growing partner marketplace. In addition, Atlassian has a new offering, Jira Service Management, which is geared to support dev and ops teams that are working to deliver improved customer experience. It streamlines the process of setting up a service desk for the enterprise, including support for automation, asset management, and cloud migration.

Confluence has integration with Atlassian's other products, including Jira Software and the aforementioned Stride. Atlassian recently updated the Confluence interface, which is now simplified to expand the white space where work gets done and has more intuitive icons to help users jump from one task to another. Collaboration across an engineering organization is critical and by tying collaboration into the core Agile Development platform, Confluence is well positioned for this use case.

Strengths

- Product management use case
- Low cost
- Mobile capabilities
- Application marketplace

Challenges

- Balancing focus on multiple products

Jive Software

Jive, purchased by Austin, Texas-based Aurea Software in May 2017, now focuses on Internal Communities as its main product offering. Jive now comes with pre-built pages and templates. The Jive PeopleGraph also allows enterprises to understand more about how people connect with each other and with content. It uses machine learning to interpret user input and help define what information they are looking for within the intranet to aid discovery. Its support for enterprise communities includes AI-driven suggestions that help put employees in touch with the proper collaborators and directs them to desired content. Additionally, Jive support for analytics helps enterprises take intranet use data and analyze it to determine collaboration patterns and drive business process insights. Jive offers an out of the box recommendation engine to allow the right content to be shared with co-workers. Jive now leverages Amazon AWS Cloud for its public cloud option.

Recently, Jive has announced that it integrates with Google Workspace, Microsoft 365, and Salesforce to enable integrated work environments. Its product is organized around the three themes of Corporate Communications, Collaboration, and People & Knowledge Discovery. Aurea and ESW have committed to customers that they will complete Jive's announced roadmap once they are satisfied with the product's stability and quality.

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Jive Interactive Intranet still offers one of the most robust integrations with Microsoft Office and strong search; this makes Jive a fully integrated work and knowledge hub. We expect Aurea Software to leverage Jive in its other solutions.

Strengths

- Global awareness
- Partner apps/Ecosystem
- Analytics
- Microsoft Office Integration

Challenges

- No External Community Capabilities

Workplace by Facebook

Facebook offers Workplace by Facebook, its enterprise offering. It has been growing its base as it extends its core capabilities to the enterprise. Two core capabilities for Workplace by Facebook are Messaging (Messenger), Pictures, and Video. For Video in particular, Facebook has enabled sharing. Facebook Live broadcast has become popular for townhall meetings, in part because of viewership.

Workplace by Facebook did make major strides in enabling users to share content. It now allows a user to create a file, but users can also select a document to share from either Google or Microsoft. One of the benefits of using Workplace by Facebook is its ease of use. It is easy to share information in the general newsfeed or in groups and navigation is simple, too. While Facebook offers a dedicated platform for enterprises that is separate from its consumer business, there is still a lingering concern over past security issues.

Strengths

- Ease of Use
- Overall support for video
- Mobile capabilities
- Brand awareness

Challenges

- Balancing focus on consumer and enterprise product offerings

Innovators

Bloomfire

Bloomfire, based in Austin and led by CEO Mark Hammer, offers a community platform with two key areas of focus: knowledge engagement and insights for the enterprise, customer support, and market research functions. Bloomfire has basic and advanced capabilities with the ability to create single or multiple communities. It includes AI-based content analytics so associates can find the content that is relevant for the task at hand.

The Bloomfire product does integrate with existing repositories such as Box, Dropbox, and Microsoft OneDrive. One of the modern capabilities that Bloomfire enables is the ability to create and share multimedia and interactive content, such as HD video, with closed captioning, automatic transcription, and the ability to locate the specific point in a video or audio file where a keyword is used. Bloomfire should be looked at as a digital knowledge sharing and engagement platform that can meet the needs of multiple employee centric use cases.

Strengths

- Customer support and market research use cases
- Automatic transcription of video and audio files
- Ease of use
- Mobile capabilities

Challenges

- Market awareness outside of U.S.

Huddle

Huddle, which is privately held and based in London, focuses on document/collaboration and client engagement portals. Huddle offers secure and collaborative content management that includes collaboration in and around specific documents. This combined with its focus on client portals that also leverage content sharing help to make Huddle a good choice for document intensive industries where users need a way to collaborate with clients. Client and partner portals are a targeted form of external communities that are seeing market growth.

For internal use cases, Huddle helped to pioneer the digital work hubs approach with a content first approach. Huddle also offers strong security as well as task management to help keep teams focused. For remote work, Huddle has continued to enhance its mobile app offerings that allow people to work on mobile devices including tablets, with the high level of functionality. The ability to manage projects, collaborate, and have a robust set of content management features for internal and external teams makes Huddle a solid choice for enterprises.

Strengths

- Content and collaboration capabilities
- Client and partner portals
- Document-based collaboration
- Industry solutions
- Mobile experience
- Task management

Challenges

- Awareness in the U.S.

Neudesic

Neudesic offers both products and consulting services with an expertise historically centered around products and solutions for the digital workplace. Neudesic offers two of its products, Pulse Social Collaboration and ikaun for experience management. Neudesic Pulse gives enterprises options as an on-premise solution. Neudesic Pulse includes the ability to build custom communities including newsfeeds, expert search, content management polls to allow users to collaborate, share knowledge, and find expertise. Task management helps to round out the Pulse platform which has evolved to also act as a digital work hub.

Neudesic merged its Firm Directory product into a new unit called ikaun. Ikaun is all about experience management including content automation, firm directory, and matters and experience discovery. On the discovery side, ikaun discovery is an internal expertise discovery system built on the Pulse platform, targeted at law firms and corporate legal departments. Neudesic has made significant strides in AI, to add intelligence into a number of its offerings, leveraging Microsoft Azure Cloud and Microsoft Power Platform. Neudesic Pulse integrates with the full line of Microsoft offerings, including SharePoint, Teams, Outlook/Exchange, and Cognitive Services.

Strengths

- Integration with other key ecosystems
- Community focus
- Microsoft Azure and SharePoint integration
- Legal focus
- Directory capabilities
- Focus on experience management

Challenges

- Balancing services consulting vs. product offerings

Aragon Advisory

- Enterprises should focus on employee and customer communities, with a realization that digital work hubs are a trend for getting work done in the enterprise.
- Ease of use and the operational outcomes should be critical evaluation criteria.
- The role of intelligence, including the addition of question-and-answer virtual agents will continue to become a larger part of this market.

Bottom Line

Knowledge is critical to work and customer success. The communities market has evolved to two important use cases with both employee and customer experience being important. Given consolidation and the need for better outcome driven communities, enterprises may want to evaluate current providers with the objective of finding providers who are pushing the envelope in both the overall experience and the intelligence that goes with that.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer experience:** Feedback on the product, installs, upgrades and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?
- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international*, or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators*, or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives, but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well, but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

Enterprise social networks often become the hub of an organization, where work gets done and information is stored and accessed. An ESN is different from a social layer, where just activity streams are shared.

The inclusion criteria for this Aragon Research Globe are:

- A minimum of \$5 million of primary revenue for social software or \$15 million in a related market (collaboration, content management, or portal/UX software).
- Shipping product: Product must be announced and available.

- Customer references: Vendor must provide at least three customer references in each region where it does business.

Exclusions

The following vendors were excluded from this Aragon Research Globe:

- SAP
- IBM—sold its collaboration business to HCL
- Tibco
- Bolste

New Additions

- HCL