



Author: Jim Lundy

Topic: Social Software

Issue: Who are the social software providers and how will they evolve?

The Aragon Research Globe™ for Social Software, 2016: Shifting to Work and Outcomes

This Aragon Research Globe™ for social software evaluates 21 Enterprise Social Network (ESN) providers who each focus on the core problem of sharing knowledge. The market for ESNs is shifting to focus on Work Platforms, as buyers look to consolidate the rising tide of work tools. This Globe Report provides a guide as to who is doing what in the market.

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Introduction – Knowledge Sharing is the Base of the ESN

Enterprise Social Networks (ESNs), or Communities, as they're sometimes called, are shifting as workers are seeking new and easier ways of sharing knowledge. There are many enterprises that still struggle with the purpose of an ESN, while others have harnessed this collaborative technology to enable knowledge sharing across the enterprise.

A Community acts as a Knowledge Network that combines content, information, and tacit knowledge (expertise that people know). Enterprises that have harnessed this power of Social Collaboration have done so by having clear use cases and active communities. Going forward, the challenge for enterprises will be getting the right information to knowledge workers who may be on the go.

From Sharing to Work Platforms and Hubs

The second challenge for enterprises when it comes to social collaboration and knowledge sharing is productivity. ESN providers are starting to respond to this challenge with a larger focus on Work and what Aragon is referring to as the rise of Work Platforms or Hubs. Work Platforms help individuals manage work as well as teams and groups. We look at Work Platforms as more than just tracking tasks, which today is the primary capability that will evolve over time.

Activity Feeds and Mobile Chat – Better Together

Activity feeds, which have been the mainstay of ESNs, are giving way to more focused Mobile Chat capabilities. People on the go need to collaborate and for many, that means texting. That said, in a work setting, this form of chat could get lost or remain isolated, which becomes a problem when data or exchanges need to be accessed at a later date.

Due to widespread user preference to chat or message while on the go, chat-based Mobile Collaboration is the fastest growing segment of collaboration. A number of vendors in this report are offering this capability, including VMware, Bolste, Cari, and others. Overall, the need to support Mobile Chat in the enterprise will continue to expand.

Machine Learning, Chatbots, and the Rise of Digital Assistants

The need to get work done means providing answers faster. Machine Learning is the foundational technology that is driving the rise of Digital Assistants. One of the first examples of Digital Assistants are Chatbots, and we expect more ESN providers to add Chatbots in the next twelve months.

While Chatbots will be the first iteration of Digital Assistants, operating systems are adding voice capabilities at a fast clip. This, combined with Machine Learning, means we are closer to having information retrieved automatically via Digital Assistants than one might think. By YE 2018, we expect that a number of leading providers will add Digital Assistant capabilities to their platforms to speed up the delivery of knowledge to users.

Use Cases Still Rule

Clear use cases, which are one of the most critical components of Social Collaboration, are what have enabled Social Software to mature. When the use case is defined, the ESN deployment is often very successful. That said, when a community is deployed without clear focus and clear ownership (for example, without appointing a Community Manager), enterprises face challenges. The biggest challenge has been connecting critical content repositories to the ESN. Today, leading providers accomplish this seamlessly.

Social Business Applications

Purpose-built applications are one of the pivots that a number of ESN providers are shifting to. Leading focus areas include Social Learning, Internal and External Social Networks, Sales Enablement, and Customer Support. Increasingly, these are referred to as Social Business Applications. Many providers are offering these capabilities with a combination of approaches. Some are adding native integrations with their existing products. Others have added integrations with third-party apps via a store or app exchange integration.

ESNs are becoming more contextual – and in some cases, more integrated – into key business processes. What this means is that ESNs are becoming more of a collaboration platform versus a separate, isolated tool. Content has become much easier to integrate and activity feeds for many offerings have become far more contextual.

ESNs Must Support Video Channels

While the demand for video content is growing, the frequent problem is that video repositories are often separate from the ESN. When an enterprise needs to share knowledge, the software category that most closely resembles a Knowledge Network is the Enterprise Social Network. This is why we feel that more ESN providers need to fully support access to Video. Today, most ESN providers are still partnering with Enterprise Video providers such as Kaltura, KZO, Panopto, Qumu, VBrick, and uStudio, in order to support video channels.

Looking to the Future: Work Platform Capabilities

The aforementioned trends point to the consolidation of best-of-breed capabilities. In the future, we expect Work Platforms to become more integrated and to add more capabilities that today are still served by best-of-breed offerings. Some of these capabilities include:

- Individual and Team Work Management
- Collaboration and Communication, including Mobile Chat
- Content Management, which means integrating with existing repositories
- Advanced Profiles
- Predictive Analytics via Machine Learning

- Integrating Internal and External Groups to enable better Customer Experiences

Focus on Outcomes

When deciding on an ESN and how it will be used, there are several critical questions that need to be answered. Figure 1 shows the relationship between ESNs and the focus on specific use cases and Lines of Business in an enterprise. In order to be an asset for the enterprise, an ESN/community should focus on delivering business outcomes by addressing the following questions:

- Are my customers receiving the answers they need?
- Can sales professionals collaborate on deals?
- Can employees and customers learn faster and get the answers to product questions?
- Can people find expertise inside or outside of the enterprise?

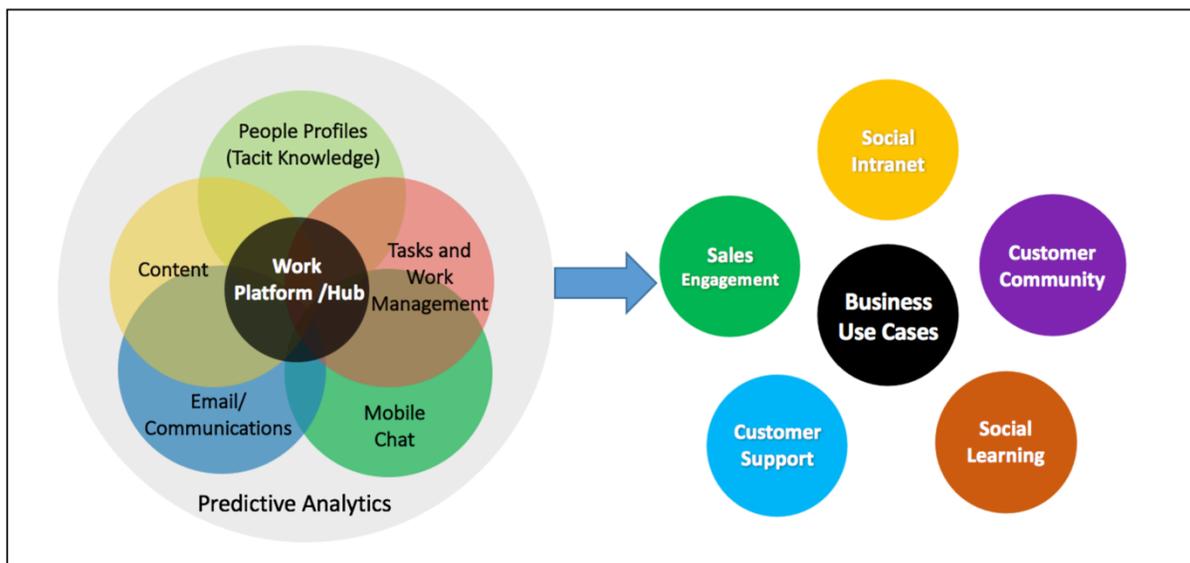


Figure 1. ESNs are morphing to become Work Platforms that deliver Business Outcomes.

The purpose of having a community is to bring more social context into business processes. Increasingly, many ESNs are adding real-time collaboration capabilities along with the present activity streams to enhance contextual, collaborative decision making in real-time. The concept of presence is tied to the profile, which allows single-click access to multiple communication modes for collaborative interaction from within the social environment.

Because of the challenges in deploying and using an ESN, while many enterprises have deployed a social network, others still wonder if they should shift their Intranet to a social platform or if they should have a customer community. The technology providers in the market are evolving and today, there are more best practices than ever to ensure success. In this fourth Aragon Research Globe, we evaluate the providers in the Enterprise Social Software market.

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:

- Broadvision
- Liferay
- Telligent

New Additions

The following vendors have been added since our 2015 Globe was published:

- Bolste
- Cari

The Aragon Research Globe™ for Social Software, 2016
(As of September 23, 2016)

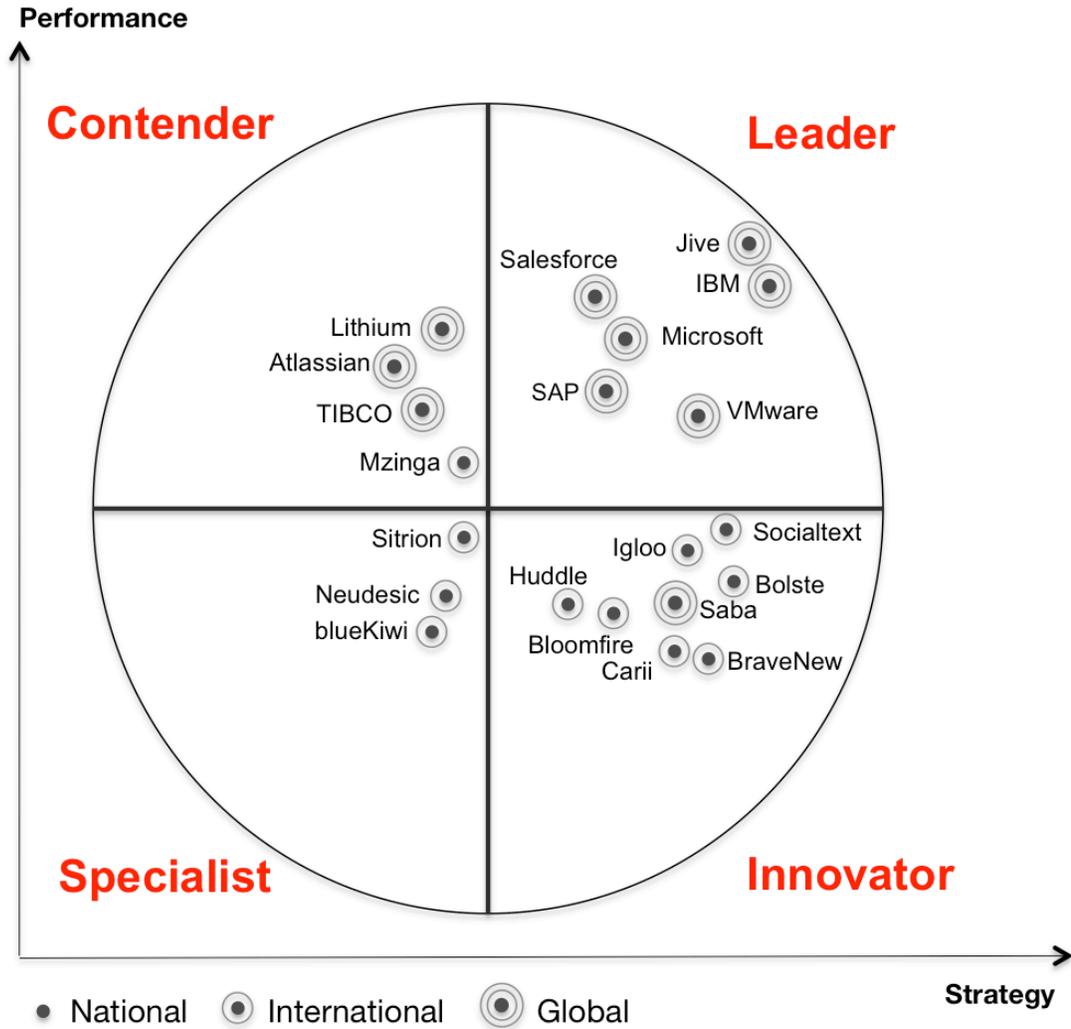


Figure 2: The Aragon Research Globe™ for Social Software, 2016.

Leaders

IBM

IBM has continued to expand its Social Connections offerings with new features as well as a more fully featured set of collaboration offerings, which allows it to compete against Microsoft. This allows its customers to choose how much collaboration that they want with the realization that IBM is planning a Q4 preview of new assistive capabilities to better manage the flow of collaboration. Expanding beyond the current use of analytics, cognitive services will help provide better recommendations on relevant content.

IBM has been making it easier to collaborate on the go as well, and the 5.5 edition features the ability to manage content on mobile devices. The IBM Connections Cloud service includes Social Business, email, instant messaging, web conferencing, file sharing, and document editing. IBM's lead offering is IBM Connections Cloud S1, which includes IBM Connections and IBM Verse. With its growing set of partners, such as Box and Cisco, IBM Connections can be configured to meet multiple business user needs. This will help to simplify IBM's broad portfolio for buyers interested in broader Collaboration and Social Business capabilities.

Strengths

- Global presence
- Predictive Analytics Capabilities
- Content Management
- Native mobile apps

Challenges

- Ease of adding external users to a Community

Jive Software

Jive is meeting the trend toward smarter communities head-on with its recent release of Jive WorkHub for both internal and external communities. Over the last year, Jive expanded its Leadership team and with new Sales and Engineering Executives, we are seeing solid wins and a strong momentum behind new innovation.

Jive's new Intelligent Profiles can streamline and speed up how knowledge is shared within the enterprise, just as personal analytics can inform users more about their reach and impact on the network, as well as what is happening with their team. The result of all of this should be the ability to do faster work. With these capabilities, plus the solid integration with Microsoft Office and strong search, Jive is fulfilling the promise of an integrated work and knowledge hub. Customers note that the Jive UI is user friendly and that it enables easier information sharing throughout the enterprise.

Strengths

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

Challenges

- Enterprise customers note cost can be a challenge

Microsoft

Microsoft has been making solid usability improvements to Yammer that have been well received by users. While Yammer is sold standalone, it is usually bundled as part of Microsoft Office 365 E1, E3, and E5 editions. One of the big moves this year was to integrate Yammer fully into the Microsoft Cloud, and Yammer is now part of the Office 365 tenant that enterprises are using. This move also made Yammer part of the Microsoft Trust Center.

Yammer is still one of the simplest ESNs to allow for external collaboration, and doing so requires minimal System Administration overhead. Yammer is also being integrated with Skype for Business, a core component of Office 365; Yammer is a core element in the Office 365 Suite. Given the bundling with Office 365, this makes Yammer a compelling value for Social Intranets and External Communities.

Strengths

- Office 365 integration – Office Documents
- Ease of use
- Creating External Communities
- Security

Challenges

- Ease of Integration with OneDrive and SharePoint

Salesforce

Salesforce has been quietly re-engineering the collaboration experience by making Salesforce Chatter the collaboration layer for the Salesforce platform. Salesforce Chatter powers its expanded focus on Communities, and all Salesforce Clouds (sales, service, etc.) offer communities as an add-on option. Chatter itself has become easier to use and more robust with more embedded functionality such as tasks and approvals, topics, and answers. Demand for the Salesforce Community Cloud has increased in part because of the use cases, such as partner and support communities. It is frequently a core element of change management, employee communication, internal productivity, HR/IT support, and cultural and strategic alignment initiatives.

Both Salesforce Chatter and Salesforce Community Cloud have been completely updated for mobile access, in part because of Salesforce's new user interface called Lightning Experience. Lightning makes Chatter native and embedded in all of the Salesforce Clouds. One item that stands out for Communities is the integrated analytics that focuses on outcomes, not just engagement.

Strengths

- Mobile Support
- Ease of Use and Functionality
- Open APIs
- Ecosystem of partners

Challenges

- Pricing for Communities

SAP

SAP Jam has become the de facto collaboration platform for SAP. Over the last year, SAP Jam continued its push into Social Learning via the SuccessFactors Talent Platform. It also expanded its Collaboration capabilities with a growing focus on external communities. Its 2015 integration with SAP Hybris commerce offers a more social experience for buyers.

SAP Jam has been experiencing strong growth in SAP enterprises, and now has more than 34 M users. Jam also supports integration with Microsoft SharePoint and Outlook, keeping it in line with workflows in the wide range of environments using Microsoft technology daily. Additionally, Jam supports integration with systems outside of SAP, such as Sugar CRM, Alfresco, and Microsoft SharePoint.

Strengths

- Collaborative business processes with contextual data integration
- Community Integration with SAP Portfolio
- Advanced mobile application capabilities
- Developers' ability to customize, embed, integrate and extend

Challenges

- Awareness outside of SAP accounts

VMware

Socialcast by VMware is part of VMware's overall portfolio for Work called Workspace ONE. Socialcast provides robust Mobile Messaging, Video integration, and scalability that is ideal for small and large enterprises. Socialcast has launched a comprehensive Mobile Collaboration app that allows chats to occur on mobile devices as well as within Socialcast on a browser.

VMware offers robust capabilities that leverage the best of both collaboration and content, which is critical to a community. By leveraging text content and video content, all within either a browser or mobile experience, Socialcast represents a modern Social experience. This offering, which incorporates social, video services, and content, is positioned to bring context to collaborative interactions and support the emerging mobile workforce and Mobile Collaboration.

Strengths

- VMware ecosystem
- Tasks and Project management
- Mobile Collaboration Chat capabilities
- Content Collaboration Bundle mobile platform

Challenges

- Awareness with business buyers

Contenders

Atlassian

Project-based teams have traditionally used the Atlassian Confluence product for content creation and sharing. As a social offering, it allows the creation of communities. It has a growing ecosystem and we do tend to find large pockets of deployments in enterprises, partially due to its growing partner marketplace. There is significant usage in product development teams for documenting development processes.

Confluence has integration with Atlassian's HipChat offering, which provides real-time Collaboration capabilities such as chat, video conferencing, and screen sharing. HipChat is also a leading product in the emerging Mobile Collaboration space. Atlassian's JIRA product is also integrated for ticket-based issue tracking and project management.

Strengths

- Integrations
- Low cost
- Mobile capabilities
- Application Marketplace

Challenges

- Market awareness

Lithium

Lithium, based in San Francisco, has been focused on Customer Communities, which is still the main offering in its portfolio of Digital Marketing solutions. Lithium has a background in gaming and understands engagement science. That is why many large enterprises count on Lithium for their Customer Community.

In 2016, Lithium launched Lithium Reach, which focuses on Digital Marketing and engagement across multiple social media channels. With a complete focus on the marketing buyer, Lithium is well positioned for the era of Digital Experience Management, which is all about serving individuals, not just users.

Strengths

- Customer and Support Communities
- Marketing Solutions
- Gamification of the experience
- Brand Awareness

Challenges

- Heavy focus on Discussion Forums

Mzinga

Mzinga, based in Burlington, MA, continues to innovate in social learning, external communities, and Video Learning. Large brands count on OmniSocial Engaged, its Community Platform, in part because of the flexibility and scalability. In 2016, Mzinga also rolled out TWIL, its new Collaborative Video Learning Platform that is garnering interest as part of the Mzinga Product Portfolio.

Mzinga's OmniSocial Learning platform supports a number of use cases including social learning, video learning, and expanded support for extended enterprise. Mzinga makes it easy to create content via Composica, its content creation tool. Mzinga scales well for enterprises where there is a business requirement for participation by an external audience in the ESN (agents, partners, customers, etc.).

Strengths

- External communities
- Moderation services
- Video Learning
- E-commerce support
- Scalability

Challenges

- Market awareness

TIBCO

TIBCO has enhanced its Social Collaboration offering tibbr, by integrating it with TIBCO Spotfire analytics. tibbr is an easy-to-use ESN that allows users to collaborate and do work on any device. The tibbr experience includes task management, content creation, and ideation, which all work on mobile devices and PCs. Increased application integrations such as Salesforce and NetSuite evolve tibbr from a pure activity stream to a collaborative work platform.

tibbr has continued to make it easy to connect to content, and in tibbr 7, it has added FedRamp certification and enhanced analytics. Finally, because tibbr supports Private Cloud deployments, it may be ideal in certain regulated industries.

Strengths

- Mobile app functionality
- Ease of use
- Analytics
- Third party app integration

Challenges

- Overall Market Awareness

Innovators

Bloomfire

Bloomfire has been enhancing its product offerings and adding new leadership. In 2016, it announced Mark Hammer as COO and Bill Tole as CFO. Bloomfire's knowledge platform focuses on use cases, such as social learning, customer support, and sales enablement. In 2016, it enhanced its focus on Sales Enablement with a new edition called Bloomfire SE. Bloomfire SE is fully integrated with Salesforce Sales Cloud.

The Bloomfire product supports the ability to create and share multimedia and interactive content, such as HD video, with native webcam and screen casting capabilities. With integrations with leading Mobile Content Management offerings, Bloomfire has also integrated IBM Watson Analytics to enable business users to get real-time information to drive faster sales, support, or learning scenarios.

Strengths

- Sales Use Case
- Embedded Video Support
- Ease of use
- Mobile capabilities

Challenges

- Market awareness outside of U.S.

Bolste

Bolste, based in Scottsdale, is making a difference in the ESN market by focusing on work outcomes instead of just collaboration. Bolste has been gaining traction in enterprises and SMBs because of its approach to work and the fact that it combines many of the individual work and social tools needed today into one offering.

Bolste recognized the shift to Mobile and offers users the ability to collaborate via Mobile Chat, which is integrated into the Bolste daily activity feed so teams can be on the same page with customers, partners, etc. Bolste combines file sharing, email, task management, video collaboration, and corporate calendars into a single interface. All of these capabilities combined make Bolste a new modern Work Platform that is poised to take on and replace existing ESN offerings.

Strengths

- Ease of Use
- Task Management
- Video Support
- Mobile Chat capabilities

Challenges

- Market awareness outside of U.S.

BraveNew

BraveNew, based in San Francisco, offers a new, modern, and customer-focused Social experience. BraveNew has been seeing success in the market by focusing on Knowledge Sharing and Learning as its primary use cases.

One of the things that stands out about BraveNew is its ability to be easily adapted to fit an enterprise's needs via its community pages that are able to manage navigation of users. BraveNew's integration of Machine Learning ensures that its platform automatically curates contextually relevant content from both the platform and also across the Internet. This allows BraveNew to be well positioned to help enterprises with their quest to share critical Knowledge.

Strengths

- Features
- Customization
- Community Pages
- Surfacing Internal and External Content

Challenges

- Market awareness

Carii

Carii, based in Media, PA, offers its social network based on an "Ecosystem," which lets internal users and external users collaborate, particularly around communities of interest, with multiple levels of privacy and control. Carii also supports Mobile Collaboration, making it a flexible and efficient communication and collaboration tool for organizations.

Carii enables the integration of focused Community groups within a social Ecosystem. This layout allows Carii to effectively connect users and groups flexibly in an organic fashion. Carii puts Community leaders in charge of advertising and sponsorship, allowing for a deeper level of control within Communities. Carii's organic method of connecting individuals and teams around the world and within an organization puts it on the forefront of professional collaboration technology.

Strengths

- Features
- Mobile Collaboration
- Internal and External Communities
- Advertising Support

Challenges

- Market awareness

Huddle

Over the last year, Huddle has revamped its management team and it continues to focus on both Europe and North America. With a priority for Mobile Content Management, Huddle is focusing on the intersection of content and collaboration. Huddle helped pioneer the increased focus on work productivity and in 2016, it added Task Management as a core feature set.

Huddle also offers predictive content capabilities – which auto syncs content that a user needs for work each day. Huddle has had this capability for over two years and we expect others to mimic this feature set.

Strengths

- Content and Collaboration Capabilities
- Predictive Content
- Mobile experience
- Task Management

Challenges

- Awareness in the U.S.

Igloo

Igloo, based in Kitchener, Ontario, Canada, focuses on Social Intranets aligning operations and preserving culture through more effective communications. In July 2016, Igloo announced the addition of four senior executives who will focus on Sales, Marketing, Customer Success, and Alliances. The addition of the new executive talent should help to drive sales, attract a broader partner ecosystem, and build awareness of Igloo in the market.

On the product side, Igloo announced full integration with Microsoft Office 365, Google for Work, File Sync and Share, Mobile Chat, and IT Helpdesk, which means users will be able to connect their Work Platforms to Igloo. That, along with Igloo's support for building custom widgets, and their portfolio of integrations, is helping to strengthen its position as a hub for internal communications and knowledge sharing. Igloo is a solid choice for a Social Intranet and its ability to create fully branded communities and enable templates for customization is something that people who want to migrate away from older Intranet technologies will appreciate.

Strengths

- Focus on use cases
- Ease of use
- Templates
- Microsoft Office 365 Integration

Challenges

- Market Awareness

Saba

Saba, a pioneer in Social Learning, is now a privately held company, and added a new CEO Pervez Qureshi in 2016. Saba's social collaboration is a core part of its Saba Cloud Platform, which includes Learning, Recruiting, Succession, Compensation, Workforce Planning, and Performance.

Saba enables employee engagement via peer-to-peer feedback using social impressions, badges, and gamification. Saba has had predictive capabilities for over one year via its embedded predictive analytics, which it refers to as TIM, The Intelligent Mentor. Saba also allows customers to extend the Saba Cloud via its marketplace third-party apps, which are easily configured in the Saba cloud.

Strengths

- Social Learning and Engagement
- Integrated presence, online meetings and virtual classrooms and playback
- Predictive Capabilities
- Marketplace

Challenges

- Migrating its substantial install base to the cloud

Socialtext

Socialtext, based in Palo Alto, is recognized as an ESN pioneer. Today, Socialtext continues to design and release innovative ESN capabilities that enterprises need, including an easy way to customize the look and feel of the platform and a new, enhanced mobile experience. Socialtext has a solid base of long-time users and its integration with PeopleFluent human capital solutions is winning new customers. This brings a suite of offerings spanning several business disciplines, in addition to merging social with HCM and video content management.

Socialtext can support multiple use cases such as Sales and Talent Management and it does so by leveraging integrations and connectors to Salesforce and Microsoft SharePoint, as well as native integration into PeopleFluent Mirror. Socialtext now has a larger distribution channel and better growth opportunities.

Strengths

- Customizable Widgets and Start Page
- Video sharing, video content management, and video search
- New native mobile app for Apple and Android
- Integrated Social HCM offering via PeopleFluent

Challenges

- Support for other Content Repositories

Specialists

Neudesic

Neudesic updated its Pulse Social Collaboration Platform in 2015. Version 4.6 offers an enhanced user experience, new file sharing, and better search across content. Neudesic Pulse is a solid choice as an on-premise solution that includes newsfeeds, tagging, expertise location, search, file sharing, polling, document management, and mobile, to give organizations an integrated collaboration platform, knowledge repository, and expertise discovery system.

Neudesic has had success with The Firm Directory, an internal expertise discovery system built on the Pulse platform, which has a cross industry focus but also includes a specific version designed for Law Firms and Corporate Legal Departments. In 2016, Neudesic announced The Research Directory, which builds on The Firm Directory and can allow easy access to content and information about matters and clients or other types of organization knowledge. With its lines of business focus, Neudesic Pulse integrates with the full line of Microsoft offerings such as SharePoint, Skype for Business, and Exchange.

Strengths

- Integration with other key ecosystems
- Ease of use
- Legal Focus
- Directory Capabilities

Challenges

- Market awareness

blueKiwi (an Atos Company)

UCC provider Unify recently took over responsibility for blueKiwi (an Atos Company) in 2016. blueKiwi offers a SaaS-based ESN that enables ideation, communication, and collaboration for internal and external communities. blueKiwi has found some success with its Aoraki module, which features improved ergonomics and faster access to messages, as well as new updates in areas such as surveys, documents, and tasks. blueKiwi's organizational unit model for structuring communities allows customers to build a structured ecosystem of connected communities, both internal and external.

We expect Unify to integrate Circuit, its Mobile Collaboration Platform, with blueKiwi over time. We also expect broader distribution of blueKiwi which has had solid interest in Europe.

Strengths

- File sharing supports links to document viewers from within activity streams
- Windows universal app maturity
- Community eco system enablement

Challenges

- Market awareness
- Growth outside of Europe

Sitriion

Sitriion focuses on Mobile Apps for work and approvals. It still generates a majority of its revenue from its legacy Newsgator business, which works with Microsoft SharePoint OnPremise. The acquisition of Yammer by Microsoft is a major reason that Sitriion has repositioned itself as a Mobile App Approvals Provider via its Sitriion One offering.

Sitriion still has a large install base in Sitriion Social and it is a fully featured ESN. That said, given the shift of large enterprises moving to Office 365, enterprises are evaluating the cost of staying with Sitriion versus going with Microsoft Yammer, which is bundled into Office 365.

Strengths

- Installed base tied to SharePoint
- Integrated SAP processes
- Mobile app capabilities

Challenges

- Market awareness of Sitriion

Aragon Advisory

- Carefully evaluate ESN providers both on current capabilities and on product roadmaps, particularly on the addition of additional functionality, such as Mobile Chat, File Sharing, and Task Management.
- The ability to engage with internal and external users is key – and ease of use continues to be a key selection criteria.
- Make sure that a community manager is part of your deployment plan.

Bottom Line

ESNs are becoming more contextual and more focused on Business Outcomes by enabling sharing of critical knowledge. As workplace tools proliferate and the demand for simplification and productivity re-emerge, ESN providers are responding. The need to make work simpler and the need to harness knowledge from multiple sources is what enterprises are looking for.