Critical Capabilities for Social Software in the Workplace

Published: 17 September 2013

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As the social software market matures, expectations for basic features have converged while vendors innovate with specialized functionality. Buyers need to understand their requirements before looking for solutions.

Key Findings

- When comparing lists of features, there is a great deal of commonality between the leading vendors of social software in the workplace.
- Specialist social software products today offer the most advanced capabilities and attract the most interest from buyers.
- The market is transitioning from emphasizing a stand-alone destination social software site to one that also values the integration of social capabilities within the flow of work processes and projects. Vendors are adapting their products to draw the work to the destination site by offering embedded work experiences, or prebuilt integration and software development kits that allow social elements to be contextually added to existing applications, or both.

Recommendations

- More functionality and features do not necessarily mean better products. Understand internal objectives to match requirements to product offerings.
- While these comparisons provide a useful baseline, buyers must also look beyond lists to consider how the tools match internal working styles and cultures. The feel of the products and how they match the way the organization works are at least as important as capability comparisons.
- While more features don't improve products, blended user experiences do. Look for vendors that integrate with commonly-used productivity tools and business applications. In doing so, pay attention to the design and user-experience needs of these socialized tools and applications, especially their mobile aspects.
What You Need to Know

In 2013, the technical capabilities underpinning social software in the workplace are not nearly as mysterious and obscure as they were even a few years ago. In fact, the market has achieved widespread consensus about what the most common features are and roughly how they should work. It is, therefore, difficult to differentiate vendors in this market by looking at those common capabilities. The market for social software in the workplace will be increasingly marked by more advanced features. Potential buyers should understand which of these advanced features their enterprises can effectively benefit from before evaluating products.

Analysis

Introduction

Organizations are increasingly interested in using social software in the workplace technologies to connect employees and partners more effectively to capture and reuse valuable informal knowledge; and to deliver relevant information where it is needed through social filtering. Sensing an opportunity, enterprise software vendors have been building and bringing to the market a range of products that borrow from consumer social networking by supporting dynamic profiles, activity streams, conversations, social graphs, and so on.

A striking aspect of this survey is that the results for most of the vendors are quite similar. While there are differences in focus and in how certain capabilities are implemented, there is a great deal of agreement on which capabilities are important. The bands separating vendors are quite small compared with critical capabilities reports in other technology areas. While some vendors are, necessarily, stronger with particular use cases, there is more commonality than divergence. There is no need to limit consideration to only the top several vendors in each use case since the differences are small. Factors such as deployment models supported (cloud, on-premises or hybrid), previous relationships, integration with installed products and level of confidence in the vendor are likely to play a strong role outside of these comparisons.

In the early years of social software, most vendors provided stand-alone or "destination" products where the only, or at least the primary, reason that users would come to the site was to collaborate or use social capabilities. Over the past several years we have seen several vendors enter this market that already sell other types of software products. While the social software products can be sold on their own, the vendors typically emphasize integration with their other products and bundle them into one package. In some cases, they do not charge anything extra for the social software tools — perhaps after a bit of negotiation. A wide variety of vendors are pursuing this integration strategy, including portals, content management, and workflow products or business applications — especially those already supporting horizontal "people processes," such as performance management and learning, or people-intensive horizontal business processes, such as account management and customer service. Examples include SAP, salesforce.com, and Microsoft. We have seen specific social features implemented in a wide variety of contexts, including performance management, e-learning, content creation suites and product life cycle management. For inclusion
in this report, the criteria require that social software must be the primary purpose of the product — excluding the many vendors that add social capabilities to an existing product.

Partly in reaction, the stand-alone vendors — such as Jive Software, Telligent (Zimbra), and VMware — have been emphasizing their integration capabilities, in some cases credibly claiming to provide better integration to a specific product than that product’s vendor does. Buyers of social software increasingly need to choose between the default choice of a social software product bundled or closely associated with their CRM, content management, portal or human resource management (HRM) product, or a stand-alone product.

This emphasis on integration is partly responsible for driving the market in a major transition toward acceptance of multiple platforms. Proliferation of social capabilities, within and across more products, and integration of these capabilities into associated products make it more difficult to achieve objectives with a single social software in the workplace platform. We expect that it will be more common for enterprises to support multiple social software in the workplace products based on the divergent capabilities or integration needed by different constituencies. Organizations should be prepared to undertake more integration work and deal with interoperability challenges with more detailed governance and usage policies.

The products evaluated in this report are aligned with those in the "Magic Quadrant for Social Software in the Workplace." Because a critical capabilities report is more detailed, it has higher inclusion criteria thresholds than the Magic Quadrant in several categories and therefore includes only a subset of the vendors profiled in the related Magic Quadrant.

Product Class Definition

This market for social software in the workplace includes vendors whose software products are used primarily to support people working together in teams, communities or networks. These products do not specialize in any particular business process or activity, but are used to support a variety of collaborative activities — that is, they are "general-purpose." Products in this market are used mainly within enterprises, primarily by and with other employees, but may also be extended to include external customers, suppliers and partners.

Buyers in this market are looking for persistent virtual environments offering a broad set of functionality to participants across the whole organization: to create, organize and share information; as well as to find, connect and interact with each other. Products in this market include both applications, which are built to deliver specific functionality "out of the box" (such as shared workspaces, or communities), and platforms — which deliver a broad range of services and capabilities that can be used as a basis for new customized collaborative applications.

Business use of these products varies in terms of the degree of formality and openness: from communication, information sharing and project coordination within small teams or homogeneous groups; to the sharing of best practices within a business unit; to the encouragement of communication, networking and information exchange between employees across the whole organization or with external participants in other organizations.
In general, products that compete in this market help users to:

- Find out about each other, personally or professionally
- Mine their networks of contacts and acquaintances for advice, references and referrals
- Form teams, communities or informal groups and invite external participants from other organizations
- Work together on the same work objects
- Discuss and comment on their work
- Organize work from their perspective
- Identify relevant work
- Discover other people or groups with common interests
- Alert users to information or events that might be relevant to them
- Learn from others' expertise

A shorthand way to distinguish "teaming" platforms from social software is that teaming products focus first on the objects that are shared and the places that are stored, such as the team workspace. In comparison, social software starts with people, relationships and conversations (such as activity streams), and how people engage. These differences are, however, becoming more a matter of emphasis than real functionality as the distinctions between the two categories begin to fade away.

Teaming platform (collaboration suite) usage is characterized by the following:

- Distributed groups of people organized for a project with a short or defined time frame, provisioned/purchased by IT management within organizations when aligned to work activities and line-of-business functions.
- Organization/company is more centralized and structured and frequently part of a regulated industry; may include governance oversight with policies and procedures.
- Focus on cost control, efficiency, workflows and project/task completion.

Enterprise social software usage is commonly characterized by the following:

- Distributed groups of people aligned by a common interest or set of tasks; commonly purchased by line-of-business managers using SaaS/cloud-based implementation.
- Focus on information sharing, expertise and knowledge networks, and qualitative business issues.
Critical Capabilities Definition

- **Profiles:** The ability to capture and display information about individual participants.Profiles reflect the verified identity of the user and may include background, interests, history of activities, and so on.

- **Activity Streams:** A chronological list of posts that people, applications or the tool itself inject into the stream. These posts relate to people, groups, topics or events.

- **Filtering and Analytics:** Ability to: use the social graph (network of relationships created by social interactions) to filter information; personalize the interaction with the system; provide people or content recommendations and calculate relevance, reliability, proximity or reputation scores; provide historical usage and trending reports; and generally to make it easier to search and find relevant content.

- **User Experience:** Intuitive interface and integrated user-centered design for final end users that provides products that require no training, but offer self-service, multiclient access especially from mobile devices.

- **Tooling, Conversations:** Ability to post messages, questions, comments and opinions, and to follow multiple conversations with others in small or large groups.

- **Tooling, Create and Share:** Share files, articles, documents in different formats, and rich media content that is either created within the social network (for example, with blogs, wikis, or rich editors), or created elsewhere but uploaded/shared via the network.

- **Tooling, Groups:** Ability to represent groups of participants that are connected through some activity or common interest; and to capture any associated group content.

- **Tooling, Control:** Ability to restrict access, monitor usage, create isolated sub-networks, integrate with existing identity management systems, invite external participants safely, and so on.

- **Integration:** Of APIs, gadgets, portlets and plug-ins, so that content and events from the social network can be embedded in other systems and content from other systems can be embedded in the social network.

- **Embedded Applications:** Support for specific activities or business processes such as, project management, issue tracking, ideation, e-learning, events, and others.

Use Cases

- **Project Team Collaboration:** Involves "heads down" work between colleagues or focused conversations around specific topics. This type of work generally revolves around a specific short-term project or task. Examples include coordinating a product launch, preparing for a prospect presentation or finalizing a report to management.

- **Social Intranet:** Is about informal conversations and relationships among large groups of people — a kind of virtual “water cooler” around some centrally provided focal point. It typically
will deal with many different topics and a variety of user roles. This use case is often pursued either as a replacement or next generation of an existing website-based intranet. Specific examples include workforce integration after a merger or acquisition, discussion and clarification or corporate policies, introduction of new personnel.

- **Social Extranet:** Deals with inviting external participants into internal conversations and workgroups in a controlled way. Typical use cases include working with PR firms or digital agencies, academic researchers, and contractors collaborating on a shared project.

- **Community Hub:** Involves groups of people linked by common responsibilities, working in similar organizational roles, or who share a common interest. The social network supports their need to discuss, capture and organize content that relates to their practice or interest. The subject matter dealt with can include IT or other support activities, business trends such as sustainability or globalization, industry trends or practices, or technical issues.

- **Innovation Acceleration:** Helps to collect the input that enables an organization to crowdsource contributions and to tap into collective intelligence by aggregating input and highlighting trends and patterns. It supports large groups of people who do not necessarily have a pre-existing common interest or role. Examples include idea jams, town hall feedback sessions and prediction markets.

- **Contextual Collaboration:** Seeks to provide access to other people within the flow of a specific task by weaving collaboration and social capabilities within and around other applications and capabilities. It attempts to anticipate user needs for collaborative insights while doing everyday work. Examples include dealing with exceptions during workflows, bringing an account team into decisions during a sales process, and collaborative decision making.
Table 1. Weighting for Critical Capabilities in Use Cases

<table>
<thead>
<tr>
<th>Critical Product Capabilities</th>
<th>Overall</th>
<th>Project Team Collaboration</th>
<th>Social Intranet</th>
<th>Social Extranet</th>
<th>Community Hub</th>
<th>Innovation Acceleration</th>
<th>Contextual Collaboration</th>
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<tr>
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<td>Tooling: Create and Share</td>
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</table>

Source: Gartner (September 2013)
Inclusion Criteria

The inclusion criteria for products evaluated in this critical capabilities report are identical to those in the Magic Quadrant for Social Software in the Workplace, with one exception. Because the critical capabilities report is more detailed and generally includes fewer vendors, the minimum number of users is 1 million instead of 200,000 as in the Magic Quadrant criteria.

To be included, a vendor must offer a product that is packaged, marketed, sold and used to support teams, communities and networks mainly within an organization — that is, not packaged, marketed or used mainly for any other purpose. The relevant product must support the following minimum functionality:

- User profiles
- Group spaces
- Content sharing
- Discussions
- Blogs
- Wikis
- Search
- Activity streams

Quantitative Market Presence Criteria

- Worldwide, the vendor has at least 60 employees in its organization dedicated to developing, marketing or supporting the relevant social software product.
- In its latest fiscal year the vendor generated at least $9 million in revenue that can be attributed exclusively to the relevant product.
- The vendor had at least 10% year-over-year growth in terms of revenue.
- The vendor has, among its paying customers, at least 15 organizations with active deployments for at least 5,000 users (that is, excluding freemium and open-source users).
- At least 1 million named users (or equivalent) among all the paying organizations are licensed to use the vendor’s relevant product and are actively using it (excluding unsupported freemium and open-source users).
- The vendor has a presence in at least three geographic regions, with some personnel dedicated to the relevant product.

In the Magic Quadrant for Social Software in the Workplace, Microsoft is represented with one entry, but it has separate entries for Yammer and SharePoint in this critical capabilities report. Magic Quadrants generally rate vendors as a whole, while a critical capabilities document goes into
the technical details of specific products. We felt that readers would find it more useful if we separated the information for SharePoint and Yammer.

Critical Capabilities Rating

Each of the products that meet our inclusion criteria has been evaluated on the 10 critical capabilities, on a scale from 1.0 to 5.0.
Table 2. Product Rating on Critical Capabilities

<table>
<thead>
<tr>
<th>Product Rating</th>
<th>Atlassian (Confluence)</th>
<th>Google Apps for Business</th>
<th>IBM Connections</th>
<th>Jive Software (Jive)</th>
<th>Microsoft (SharePoint)</th>
<th>Microsoft (Yammer)</th>
<th>News-Gator (Social Sites)</th>
<th>salesforce.com (Chatter)</th>
<th>SAP (Jam)</th>
<th>Telligent (Zimbra)</th>
<th>Tibco Software (tibbr)</th>
<th>VMware (Socialcast)</th>
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</table>

Source: Gartner (September 2013)
To determine an overall score for each product in the use cases, the ratings in Table 2 are multiplied by the weightings shown in Table 1. These scores are shown in Table 3, which also provides our assessment of the viability of each product.

Figure 1. Overall Score for Each Vendor’s Product Based on the Non-Weighted Score for Each Critical Capability

Product Rating Chart

Source: Gartner (September 2013)
Table 3. Product Score in Use Cases

<table>
<thead>
<tr>
<th>Use Cases</th>
<th>Atlassian (Confluence)</th>
<th>Google Apps for Business</th>
<th>IBM Connections</th>
<th>Jive Software (Jive)</th>
<th>Microsoft (SharePoint)</th>
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<th>SAP (Jam)</th>
<th>Telligent (Enterprise)</th>
<th>Tibco Software (tibbr)</th>
<th>VMware (Socialcast)</th>
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</table>

Product viability is distinct from the critical capability scores for each product. It is our assessment of the vendor’s strategy and the vendor’s ability to enhance and support a product throughout its expected life cycle; it is not an evaluation of the vendor as a whole. Four major areas are considered: strategy, support, execution and investment. Strategy includes how a vendor’s strategy for a particular product fits in relation to the vendor’s other product lines, its market direction and its business overall. Support includes the quality of technical and account support, as well as customer experiences with that product. Execution considers a vendor’s structure and processes for sales, marketing, pricing and deal management. Investment considers the vendor’s financial health and the likelihood of the individual business unit responsible for a product to continue investing in it. Each product is rated on a five-point scale from poor to outstanding for each of these four areas, and it is then assigned an overall product viability rating (see Table 4).

Source: Gartner (September 2013)
<table>
<thead>
<tr>
<th>Product Viability</th>
<th>Atlassian (Confluence)</th>
<th>Google Apps for Business</th>
<th>IBM Connections</th>
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<th>Telligent (Zimbra)</th>
<th>Tibco Software (tibbr)</th>
<th>VMware (Socialcast)</th>
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<tr>
<td>Good</td>
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Source: Gartner (September 2013)
Figure 2. Overall Use Case

Overall Use Case

Source: Gartner (September 2013)
Figure 3. Vendors' Product Scores for Project Team Collaboration Use Case

Project Team Collaboration Use Case

Source: Gartner (September 2013)
Figure 4. Vendors’ Product Scores for Social Intranet Use Case

Social Intranet Use Case

<table>
<thead>
<tr>
<th>Vendor Name</th>
<th>Activity Streams</th>
<th>Profiles</th>
<th>User Experience</th>
<th>Tooling: Conversations</th>
<th>Tooling: Control</th>
<th>Tooling: Create and Share</th>
<th>Filtering and Analytics</th>
<th>Embedded Applications</th>
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Source: Gartner (September 2013)
Figure 5. Vendors' Product Scores for Social Extranet Use Case

Source: Gartner (September 2013)
Figure 6. Vendors' Product Scores for Community Hub Use Case

Source: Gartner (September 2013)
Figure 7. Vendors’ Product Scores for Innovation Acceleration Use Case

Innovation Acceleration Use Case

Source: Gartner (September 2013)
Atlassian

Atlassian's Confluence is known as a wiki-centric collaboration product, but it is increasingly being used as a social platform for the creation and sharing of content by employee teams, project teams and communities. It was rated highest for content creation and sharing due to its wiki roots. Conversations and profiles were rated lowest. Atlassian is smaller than most of the other vendors in this report, but has demonstrated growth, commitment to Confluence and a willingness to invest.
Google

Google offers a broad cloud-based bundle of communication, authoring and information-sharing capabilities as Google Apps for Business. Google has strong content creation, profile and user experience capabilities. However, lack of enterprise capabilities or support in Google’s flagship social offering (Google+, which is primarily aimed at consumer users) weakened its ratings in other areas. While overall Google’s finances and investment capabilities are strong, lingering concerns about the company’s commitment or level of support for new products have lowered its viability ratings somewhat.

IBM

IBM Connections is IBM’s main product in the social software in the workplace market, and is supported by products from the WebSphere product family. IBM Connections provides deep functionality across most capability areas, especially groups, conversations, analytics and integration. Ratings for user experience, content creation and sharing negatively affected this product’s position within some use cases. IBM has demonstrated commitment to the product and willingness to invest, resulting in an "Excellent" viability rating.

Jive Software

Jive’s eponymous product supports a wide range of social software capabilities. It was rated highest for filtering and analytics, groups, conversations and integration capabilities. Areas such as embedded applications and user experience rated lower. While Jive continues to grow and execute well, its status as an independent public company invites scrutiny of its performance and a lack of profitability in this context lowers its viability rating.

Microsoft (SharePoint)

Microsoft’s SharePoint supports a range of social software capabilities both on-premises and in the cloud. While widely used, end-user enthusiasm (as reported by Gartner clients) has been dropping in recent years. Uncertainty about overlapping functionality with Yammer and Microsoft’s emphasis on cloud versions has somewhat undermined confidence in SharePoint as a social software product, especially for those planning to keep their deployments on-premises, leading to a somewhat lower viability rating than for Yammer. SharePoint is rated well for conversations, content creation and sharing, and group capabilities. Lower ratings for user experience, control and activity streams made it less appropriate for some use cases.

In this critical capabilities report Microsoft has separate entries for Yammer and SharePoint, while the ratings are combined in the related Magic Quadrant that generally rates vendors as a whole. Critical capabilities documents go into the technical details of specific products.

Microsoft (Yammer)

Microsoft’s Yammer is a cloud-based platform that has evolved into a social software platform from its roots as an enterprise social network. Microsoft has positioned Yammer as its strategic platform
for social software, although SharePoint continues to play a strong role. Yammer was rated highest for activity streams, conversations, filtering and analytics. It was evaluated as weaker in capabilities such as embedded applications, profiles and integration.

In this critical capabilities report Microsoft has separate entries for Yammer and SharePoint, while the ratings are combined in the related Magic Quadrant. Magic Quadrant that generally rate vendors as a whole. Critical capabilities documents go into the technical details of specific products.

**NewsGator**

NewsGator’s Social Sites extends and builds upon Microsoft SharePoint to address communities, social networking and expertise location. Social Sites was rated well for group, conversation and activity stream capabilities, but lower for embedded application, integration and filtering and analytics. We evaluated Social Sites separately from SharePoint, excluding capabilities for which it relies on the underlying Microsoft product. Concerns about NewsGator’s dependence on Microsoft’s products and its need to continue innovating while SharePoint improves, have somewhat lowered its viability ratings.

**salesforce.com**

Chatter is salesforce.com’s main social software in the workplace product. This cloud-based platform has evolved into a social software platform from its roots as an enterprise social network. It is integrated with, and usually sold together with — though not technically dependent on, salesforce.com’s primary CRM products. Chatter achieved good ratings on the activity streams, groups and analytics and filtering capabilities. Ratings for embedded applications and content creation and sharing were lower. The company has demonstrated strategic commitment and a willingness to invest in Chatter.

**SAP**

SAP’s Jam is based largely on the SuccessFactors Jam product (SAP acquired SuccessFactors in February 2012), with some additional functionality from the now discontinued SAP StreamWork product. Jam is used for employee communication, project collaboration, and skill/expertise tracking and reporting as part of overall performance management. Jam was rated highly on activity streams, conversations and group capabilities, but lower on user experience, integration and embedded applications. Jam is still finding its place within the SAP product line, leading to lower ratings on viability.

**Telligent (Zimbra)**

Telligent’s Community platform creates branded customer, partner and prospect communities. It was rated highest for control, profiles and group capabilities. User experience and content creation, and sharing, achieved the lowest ratings. Telligent announced acquisition of the Zimbra email platform from VMware in July 2013, and, on completion, plans to change the company name to Zimbra.
Tibco Software

Tibco’s tibbr is a cloud-based platform that has evolved into a social software platform from its start as an enterprise social network. Tibbr was rated highly for group, conversation and profile capabilities, but lower for content creation and sharing and embedded applications.

VMware

Socialcast is VMware’s social software in the workplace product. Socialcast has evolved into a social software platform from its beginnings as an enterprise social network. Socialcast was rated highly for activity streams and conversations, but lower for integration and content creation and sharing. Despite VMware’s stated commitments to Socialcast, questions remain about the company’s commitment to end-user products after sale of Zimbra to Telligent and SlideRocket to ClearSlide in 2013.

Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Magic Quadrant for Social Software in the Workplace"

"Critical Capabilities for Peer-to-Peer Customer Community Software"

Evidence

The information in this report was compiled largely from a Gartner survey of vendors’ capabilities conducted for the Magic Quadrant and Critical Capabilities notes for social software in the workplace. End-user references from each vendor were also gathered through an online survey.

In the first round, vendor responses were converted numerically to a value — based on the functionality supported and mapped to the different capabilities. These results were adjusted to ensure consistency across responses and to conform to user experiences as judged by the analysts.

Critical Capabilities Methodology

"Critical capabilities" are attributes that differentiate products in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

This methodology requires analysts to identify the critical capabilities for a class of products. Each capability is then weighted in terms of its relative importance overall, as well as for specific product use cases. Next, products are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they
meet the critical capabilities overall, and for each use case, is then calculated for each product.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor: most or all defined requirements not achieved
2 = Fair: some requirements not achieved
3 = Good: meets requirements
4 = Excellent: meets or exceeds some requirements
5 = Outstanding: significantly exceeds requirements

Product viability is distinct from the critical capability scores for each product. It is our assessment of the vendor's strategy and its ability to enhance and support a product over its expected life cycle; it is not an evaluation of the vendor as a whole. Four major areas are considered: strategy, support, execution and investment. Strategy includes how a vendor's strategy for a particular product fits in relation to its other product lines, its market direction and its business overall. Support includes the quality of technical and account support as well as customer experiences for that product. Execution considers a vendor’s structure and processes for sales, marketing, pricing and deal management. Investment considers the vendor's financial health and the likelihood of the individual business unit responsible for a product to continue investing in it. Each product is rated on a five-point scale from poor to outstanding for each of these four areas, and it is then assigned an overall product viability rating.

The critical capabilities Gartner has selected do not represent all capabilities for any product and, therefore, may not represent those most important for a specific use situation or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making an acquisition decision.
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