Magic Quadrant for Social Software in the Workplace

26 October 2015 | ID:G00270286

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Summary

The market for social software in the workplace is coming under the increasing influence of adjacent markets, which has long-term implications that favor vendors with solutions spanning beyond social software itself. We assess 14 vendors to help IT leaders find the right one for their needs.

Market Definition/Description

The 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 are not specialized for any particular business process or activity, but can be tailored to support a variety of collaborative activities — that is, they are general purpose. Employees use these products within the enterprise. External use of these products by customers, suppliers and partners is not the focus of this Magic Quadrant; however, some vendors and products should not be precluded from such applications.

Buyers in this market are looking to improve the way workers create, share, communicate and organize information. Buyers are also looking to improve the way workers connect with one another, find experts, brainstorm, find answers to questions, learn, transfer knowledge, and make decisions that ultimately improve the way work is done and how people view their organizational culture.

Products in this market include both applications that deliver specific functionality "out of the box," such as shared workspaces and communities, as well as platforms with capabilities that can be used as a basis for user-built contextual collaborative applications or to integrate across a variety of other systems.

Business use of these products varies in formality and openness and includes the following scenarios:

- Employee productivity

- Project coordination

- Process improvement

- Knowledge management

- Innovation

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 potentially invite external participants from other organizations

- Collaborate on the same work objects

- Discuss and comment on their work

- Organize work from an individual or group perspective

- Identify relevant information

- Discover other people with common interests

- Alert users to information or events that might be relevant to them

- Learn from others' expertise

Magic Quadrant

Figure 1. Magic Quadrant for Social Software in the Workplace
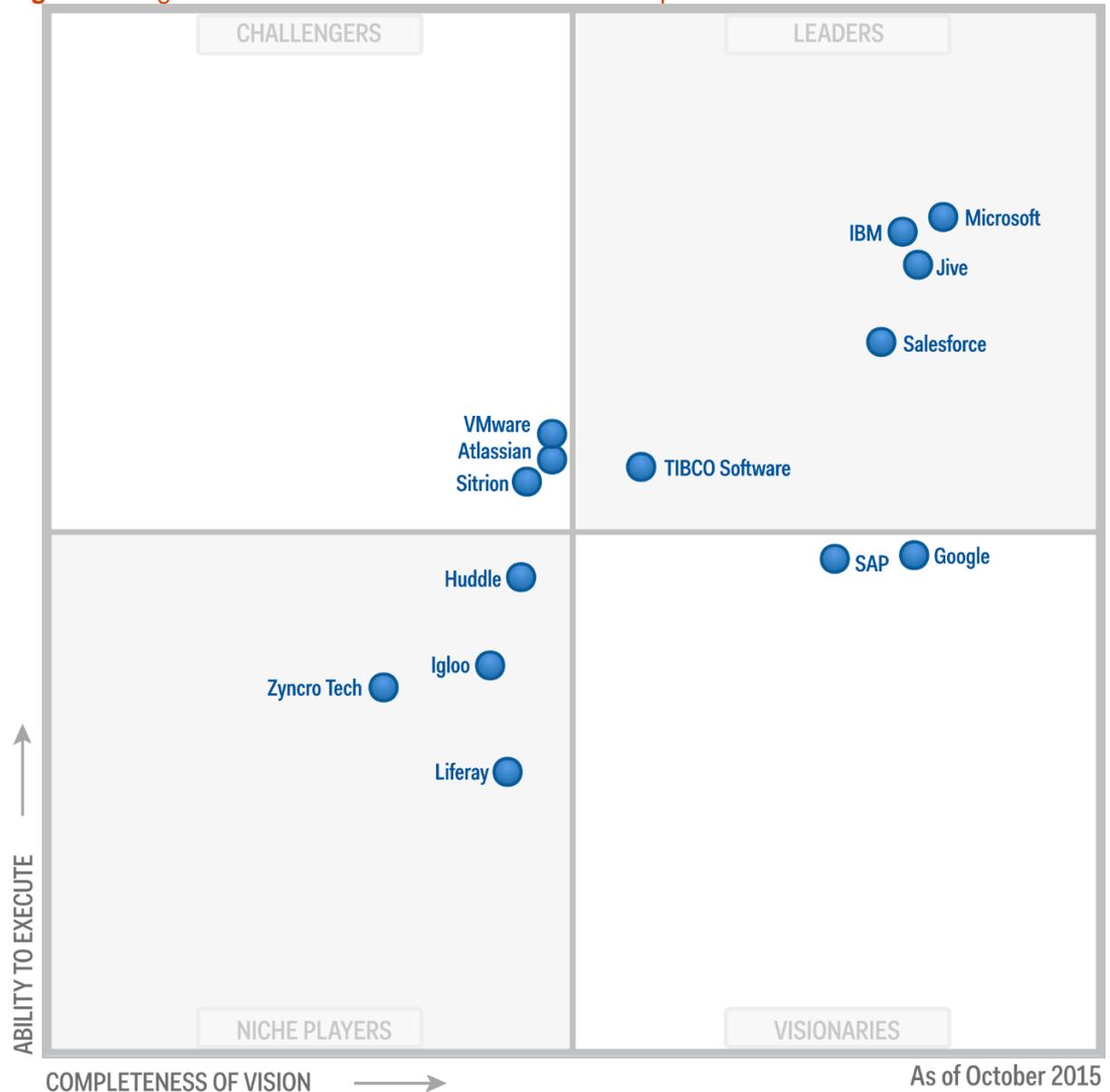
Source: Gartner (October 2015)

Vendor Strengths and Cautions

Atlassian

Atlassian is in the Challengers quadrant. Atlassian's Confluence represents a wiki-centric content and collaboration solution for teams. Confluence supports a variety of social capabilities for groups to interact and coordinate activities.

STRENGTHS

- **Viability:** Atlassian remains very focused on the needs of its major buying constituencies, which often benefit from the team and document-centric

collaboration capabilities of Confluence. This strategy creates a persistent constituency that attracts add-on partners to develop extensions for Atlassian's Marketplace, extending its base solution.

- **Functionality:** The core platform of Confluence leverages a hypertext environment that supports a variety of content creation use-case scenarios. This makes it an effective means for teams and groups to natively create, organize and share content within a structure that is simple to navigate and where locating information is straightforward. The addition of HipChat provides a consumer-like messaging functionality that has gained interest in the market.

- **Customer experience:** Organizations invest in Confluence to meet situational and purposeful needs for certain audiences (such as project teams). Integration with Jira makes Confluence especially attractive to developer/support teams. The technical engineering reputation of the vendor and Confluence has created a strong community following.

CAUTIONS

- **Vision:** The market for social software in the workplace is undergoing significant structural shifts. As the market evolves, there is risk that Atlassian will not keep pace with the type of roadmap that expands Confluence beyond its current constituency into new application categories.

- **Strategy:** Atlassian's solutions resonate with technical audiences. However, as the market for social software becomes embedded in a broad range of applications, the company needs to articulate a stronger business value message and demonstrate deeper insight into work patterns in order to broaden its appeal.

- **Pace of innovation:** While Atlassian has established a solid reputation for its core technical engineering, the company needs to show additional expertise in areas related to advanced analytics, business process and smart machines to keep pace with other vendors in the market.

Google

Google is in the Visionaries quadrant. It offers a wide selection of cloud-based communications, authoring and information-sharing capabilities known as Google Apps for Work.

STRENGTHS

- **Focus:** Google has a well-defined view on how best to encourage people to work together in a way that is both natural and easy to manage. This consistent approach is evident throughout the product and the company's go-to-market

strategy, which emphasizes simplicity, end-user focus and purity in its approach to the cloud.

- **Strategy:** Google pursues a multipronged strategy that uses the low marginal cost and flexibility of its cloud platform, its deepening relationships with channel partners, and its reputation and strong position in cloud-based ecosystems to promote its products.

- **Pricing:** Google Apps for Work has straightforward and relatively low-price licensing, especially considering the range of functionality supported. In some cases, the simple "one price for everything" at two levels of capability can impede adoption.

CAUTIONS

- **Product:** Google offers a markedly different approach and user experience to many of its competitors, particularly its primary competitor Microsoft. Users who go to Google expecting it to be just like Microsoft, but at a lower price point (a proposition that many organizations expect and that sometimes even creeps into Google's positioning), are more likely to be dissatisfied than those that embrace Google's vision and way of working.

- **Pace of innovation:** While Google has established a strong reputation for innovation, it has not shown much development in the social area of late. Google is rethinking its earlier positioning of Google+ as its primary social element across the Google properties, and its future is not entirely clear. Google+ is still offered without official enterprise support or SLAs.

- **Functionality:** Simplicity is an important part of Google's value proposition, in terms of both user experience and manageability. The downside of this approach is that Google tends to put ease of use and adoption above depth of functionality. Some users looking for, or expecting, specific deep-level functionality report that Google does not always provide the depth of support that some of its competitors do.

Huddle

Huddle is in the Niche Players quadrant. Huddle is a cloud-based, document-centric collaboration vendor with a focus on specific vertical industry support. It focuses on cross-organizational collaboration as well as internal use cases.

STRENGTHS

- **Product:** Reference customers report that Huddle is simple for end users to understand and requires little formal training in most circumstances. This ease of use provides high levels of adoption and little user resistance.

- **Focus:** Huddle concentrates particularly on organizations in the government, healthcare, media and professional services industries. It has achieved high levels of accreditation for security and operations from government and healthcare certification bodies. Rather than trying to do everything, Huddle focuses on the important use case of collaboration and team support involving participants from external organizations, with an emphasis on mobility and file sharing.

CAUTIONS

- **Functionality:** Huddle concentrates on document-centered collaboration. While it has strong repository and file-sharing capabilities, it provides less support for advanced social features such as filtered activity streams and social analytics. Huddle has formed partnerships with vendors of such solutions — notably with TIBCO Software (for tibbr) — to fill this gap, but users looking for self-contained social capabilities could be disappointed.

- **Strategy:** Huddle deployments are often used alongside other social collaboration solutions to provide additional communications, sharing and workflow capabilities. This indicates that although the company is successful at gaining customers in specific user segments, and for specific solutions, it is not always seen as a platform that can support every collaboration use case.

- **Integration:** Although reference customers gave Huddle some of the best ratings for ease of use, quick deployment and wide adoption, some also wanted improvements in terms of more flexible customization and deeper reporting and project management capabilities.

IBM

IBM is in the Leaders quadrant. IBM Connections is an expansive enterprise social networking (ESN) platform that includes a variety of related collaboration and content capabilities. Other products in IBM's portfolio — such as IBM Sametime, IBM Notes, IBM Domino, IBM Connections Content Manager and IBM WebSphere Portal Server — augment Connections' capabilities.

STRENGTHS

- **Viability:** IBM has a long history as a dominant provider for collaboration, messaging and communications solutions, and remains one of the better-established company's in the ESN space. It has extensive research and development capabilities and also cultivates strategic relationships at very senior levels, both in user organizations and with partners.

- **Strategy:** IBM's strategy spans beyond typical ESN positioning to broadly catalyze the value of Connections within its Social Business and Smarter

Workforce initiatives. It also emphasizes the role of other assets it brings to its solutions, such as IBM Design Thinking, IBM Bluemix, IBM Watson, IBM Kenexa and its large partner ecosystem.

- **Functionality:** IBM Connections includes a variety of capabilities such as content management and enterprise file synchronization and sharing (EFSS) that make it a comprehensive solution for organizations looking to deliver an all-in-one destination for employees to share information and collaborate around work activities. Its ability to integrate with WebSphere Portal Server enables organizations to extend their enterprise portal (if that is the preferred employee destination site) with social experiences.

CAUTIONS

- **Complexity:** IBM's breadth of capabilities, number of products, and deployment options can introduce complexity in terms of decision criteria, costs, configuration and support needs for on-premises deployments (versus cloud-based).

- **Integration:** IBM positions Connections as a place where people get work done. For example, work activities from business systems (such as sales, marketing, customer service, and HR applications) can be brought into Connections via OpenSocial interfaces. However, integration to surface social elements from Connections into those business applications is not as strong "out of the box" as it needs to be. While developers can use the Connections' APIs to deliver that type of user experience (or rely on third-party ISVs), IBM needs its own prebuilt integrations for users that prefer to have social interaction natively embedded in the applications they use during the flow of collaborative work rather than switch to a social platform.

- **Focus:** IBM is heavily marketing Verse as its next-generation business email solution. While Verse has many synergies with Connections, there is also some risk that customers will view the marketing messages as a shift away from its ESN efforts.

Igloo

Igloo is in the Niche Players quadrant. It offers an intranet-oriented, cloud-based solution that the company believes brings corporate communications and collaboration into the 21st century.

STRENGTHS

- **Customer experience:** Igloo's reference customers were generally positive in their feedback, praising the product's configuration and customization flexibility, quick deployment, support for nontechnical users, and ease of use. They also

were positive about working with Igloo's full-service agency and client success organization.

- **Functionality:** Igloo's product strengths lie in deep support for content publishing and community management scenarios.

- **Focus:** Rather than attempting to create a broad platform, Igloo concentrates on making a better, more social intranet experience for users. Using the intranet concept as a starting point is familiar to many organizations, who are comfortable with the idea but may have struggled with traditional Web content management approaches to corporate communications.

CAUTIONS

- **Product:** While Igloo's intranet-oriented approach provides focus, it does not fit all use cases. It is best suited to broad corporate communications and communities of interest, but less well-oriented to projects requiring specific social functionality or a narrow focus.

- **Pace of innovation:** While Igloo has introduced a new self-service framework for building enhancements and integrations, some reference customers reported that updates to provide desired functionality were slower in coming than expected.

- **Viability:** While Igloo has a good number of large customers and sees itself as a central social hub, it could run the risk of being displaced if those customers make strategic commitments to platforms from larger vendors and then pursue rationalization or consolidation in order to reduce overlap and complexity. As social capabilities become more common across large platform vendors' offerings, smaller players such as Igloo may see their unique value become less compelling in the eyes of business and IT decision makers.

Jive

Jive is in the Leaders quadrant. The company focuses on enterprises looking for a wide range of social and collaboration capabilities. As well as Jive-n for employee collaboration and Jive-x for external partner and customer communities, Jive also launched a new mobile portfolio (called Jive-w) that provides purpose-built mobile apps that address specific user needs for company news (Jive Daily), messaging (Jive Chime) and for a company directory (Jive Circle).

STRENGTHS

- **Customer experience:** Reference customers scored Jive highly in terms of overall satisfaction and, more specifically, on ease of use and functionality. A mature "customer success" program that includes use-case catalogs, solution

roadmaps and prepackaged "accelerator" solutions (such as for a support center, or a social intranet) contributes to high levels of customer satisfaction.

- **Visibility:** The early entrance of Jive into this market, as well as its ability to retain and enhance its position while many of its peers have exited (or were acquired), means that Jive appears regularly on customer shortlists. Where a buyer is looking for a dedicated platform in this market (rather than a broader solution), Jive is often the leading choice. Jive's attempts to generate more interest and demand for its products — with the new range of simpler single-purpose apps — should further enhance its market visibility.

- **Functionality:** Jive combines best-in-class capabilities not only for collaboration and social interaction, but also for curated content delivery — allowing Jive to be deployed effectively both as a social collaboration platform and a lightweight "ready to use" intranet that includes prebuilt integration with other productivity and business applications.

CAUTIONS

- **Strategy:** Jive competes with vendors that often get chosen instead of it, due to their strength in adjacent functionality — for example, horizontal applications, such as email and content management, or vertical business applications. Despite its efforts to position its integration capabilities as a neutral hub, Jive's lack of native capabilities to support work that requires process or structure increasingly puts it at a disadvantage.

- **Viability:** In 2011, Jive was one of the first platform specialists to go public. Although it is executing well — growing its top-line revenue and maintaining cash reserves — its losses (though getting smaller) are projected to continue, because it has chosen to invest in product development and in building out global data centers. Jive is still a relatively small organization (with approximately 700 staff) and needs to manage its evolution carefully, including demonstrating a credible path to profitability.

Liferay

Liferay is in the Niche Players quadrant. It offers a portal-centric platform for organizations looking for a collaboration solution that leverages their Liferay Portal investment.

STRENGTHS

- **Integration:** Liferay provides a portal-based platform with included collaboration and social functionality. Collaboration capabilities are an embedded experience without the portal itself, while social capabilities are available via the Liferay Marketplace. Liferay-based social elements can integrate with back-end and

Web-based systems, and deployments can be customized. This approach is aimed at organizations that see social software initiatives enhancing their business solutions as an integrated experience within their portal framework.

- **Product:** Liferay has done a good job of supporting the basic capabilities expected of a social networking application within a portal-centric platform. While Liferay is still considered a Niche Player, the integration and customization capabilities available in its core Portal platform also benefit those that use it for collaboration. This includes the Mobile SDK that supports responsive design with easy access to Liferay platform services, as well as integration with other Liferay products such as Liferay Sync for file sharing.

CAUTIONS

- **Strategy:** While Liferay's sales capabilities allow it to make a credible case for a combined portal and collaboration solution, a specific overall commitment to the social software market is still not established. Buyers looking specifically for a collaboration product expect a more compelling vision, which should show up in a well-executed marketing and sales strategy. Liferay will need to transform its current approach to the market if it is to move out of the Niche Players quadrant.

- **Visibility:** Liferay remains strongly identified as an open-source vendor in the portal market. It needs to showcase new customers, gain market traction and improve its support services around the use of Liferay for collaboration, if it is to keep pace with the Leaders.

- **Pace of innovation:** Liferay follows market advances more than it leads. While customers can leverage Liferay's integration capabilities themselves — to deliver new functionality — they also expect more natively developed capabilities such as advanced information filtering, notification alerts, and more granular "follow" options and recommendations. Liferay must do more to distinguish itself from the offerings of the Leaders and other competitors.

Microsoft

Microsoft is in the Leaders quadrant. Microsoft has focused its social efforts on its online offerings Yammer and Office 365 (through closer incorporation of Yammer with the rest of Office 365), while focusing SharePoint on related capabilities — including document management, portals and websites.

STRENGTHS

- **Product:** Microsoft has targeted a wide audience with a broad product platform incorporating social capabilities. While not every component is best in class, they are good enough in sufficient areas that most enterprise users can find the

functionality they need, with some parts (such as Yammer) providing compelling functionality.

- **Roadmap:** Microsoft has increased its pace of innovation with a slew of new products and capabilities released under the Office 365 banner; plus interesting developments described for capabilities such as the Office Graph, and incorporation of smart machine virtual assistant technology from Cortana.

- **Adoption:** The level of interest and firm plans for organizations to move to Office 365 and related Microsoft products are growing quickly. Microsoft can measure its social and collaboration business in billions of dollars. It would take highly disruptive events or serious missteps for Microsoft to lose its leadership position in this market.

CAUTIONS

- **Architecture:** Microsoft's move toward the cloud, in the form of Office 365, and its de-emphasizing of SharePoint as a social software platform have triggered significant changes for many existing customers. Some mismatches between Yammer and other Microsoft products have caused confusion: for example, Microsoft implemented the "group" concept differently in Office 365 and Yammer (slated to be fixed in 1H16).

- **Complexity:** As Microsoft introduces new products and ways to access Office 365 capabilities, the overall product offering becomes harder to navigate and understand. For example, the SharePoint news feed functionality overlaps with the Yammer activity stream; Yammer Now offers largely the same functionality as the IM component of Skype for Business; Delve offers a different and more social way of searching, but users can also search content using SharePoint.

- **Focus:** As Microsoft's collaboration, communications and social offerings continue to expand, it will be difficult for even this sizable organization to sustain the required level of attention across all of its new products — as well as the ones that IT organizations have come to depend on — while maintaining quality, compatibility and a clear vision. IT managers are already finding it difficult to navigate Microsoft's offerings. Microsoft is managing many moving parts as it expands with new titles (such as Clutter, Lens, Sway, Send, Cortana and Delve), and coordinating its focus will be a challenge.

Salesforce

Salesforce is in the Leaders quadrant and has two related products: Salesforce Chatter, a social engagement layer for the Salesforce platform and all Salesforce clouds; and Salesforce Community Cloud.

STRENGTHS

- **Vision:** Salesforce capitalizes on market shifts that favor contextual integration of collaborative experiences within the flow of work. Its insight into work patterns enables it to offer social capabilities contextually embedded in the business applications and new application scenarios (such as mobile, e-commerce, wearables, IoT and analytics) it brings to market.

- **Integration:** Embedding social elements into the flow of work, for better information sharing, collaboration and community building around process activities, validates the approach taken by Salesforce and other business application vendors.

- **Viability:** Salesforce is a leading company in the business application space. Integrating social capabilities throughout its application portfolio creates a very defensible market space. Additional integration synergies are achieved via Salesforce Files Connect (into Microsoft and Google, for example) and Lightning Connect (into SAP, for example). Other vendors can integrate at some level, but Salesforce's ability to deeply embed collaboration into the way people work throughout its system creates a distinct advantage.

CAUTIONS

- **Focus:** While Salesforce emphasizes and positions Chatter and Community as general-use solutions independent of its sales, marketing and other business applications, we find adoption of its social software outside heavy users of Salesforce clouds is not as strong. Gartner clients consider Salesforce to be an application-specific social software solution rather than a general-use platform. Salesforce needs to be more aggressive with specific prepackaged capabilities and cross-functional/role-based application scenarios for social software where Community solves specific use cases not affiliated with a Salesforce cloud, to change customer mindsets.

- **Pace of innovation:** While Salesforce does innovate (demonstrated by new cloud offerings, wearables, IoT and analytics), customers view advances by Microsoft (with Office 365, Office Graph and Delve) and IBM (with Watson) as enabling new ways of working. Gartner clients view Microsoft and IBM as improving the way people collaborate in cross-functional, nonroutine work scenarios. Salesforce needs to better communicate and demonstrate how Chatter and Communities' advanced capabilities address the same cross-functional, nonroutine work scenarios as its competitors.

- **Ecosystem:** While the core Salesforce ecosystem is strong, for those looking to extend its social software capabilities into areas where workers are not "everyday users" of its applications the options are not as well-known by clients

and in some cases may not exist. Salesforce needs to more strongly promote partners that pull it into cross-functional solutions where it is not as well-known as other options.

SAP

SAP is in the Visionaries quadrant. SAP is positioning Jam as a contextual collaboration solution designed around work patterns. Jam is used for employee communication, process/project collaboration and within specific business activities (such as human capital management, performance management, sales, customer service and marketing).

STRENGTHS

- **Vision:** The Jam product vision exemplifies a general trend of putting social collaboration in the context of companywide activities (such as employee communication, onboarding or learning) as well as specific business processes (such as CRM).

- **Strategy:** SAP has a strong presence in many organizations, with direct access to business decision makers (managing HR, CRM, ERP and BI initiatives) and IT executives. SAP is putting into practice its vision of collaboration in the context of business activities — through its concept of "work patterns" that blend flexible collaboration, real-time application data and process repeatability.

- **Functionality:** Apart from a number of prebuilt work patterns for companywide processes and for specific roles and tasks, SAP has enhanced the ability to create new work patterns with a new page designer and work pattern builder. The page designer, along with general enhancements to user experience, should help Jam to support social intranet use cases.

CAUTIONS

- **Visibility:** While SAP has improved the market's awareness of Jam and its in-context integration into SAP business applications (via work patterns), Gartner inquiries indicate that Jam lags behind other competing options as a general-purpose solution. Jam is not often mentioned on client shortlists and is rarely considered as an option in companywide deployments, except as a way to enhance an existing SAP environment.

- **Customer experience:** Although there have been positive developments in both the product and customer support programs that relate to Jam, the feedback from customer references is very uneven with low scores in overall satisfaction and, more specifically, in postsales assistance and functionality.

Sitrion

Sitrion (previously known as NewsGator) appears in the Challengers quadrant. Sitrion's Social Workplace is an established product in the social software market. It helps organizations rejuvenate intranets based on Microsoft SharePoint. Sitrion One augments the company's productivity efforts by creating a more unified mobile experience across Microsoft products and business applications.

STRENGTHS

- **Platform:** Since Microsoft has stated that future strategic enhancement will focus on Office 365, Sitrion is in a unique position to extend the capabilities of an organization's on-premises investment in SharePoint. While Microsoft is strongly encouraging its customers to migrate to Office 365, organizations with several years of investment in SharePoint often find themselves moving at a slower pace and may need to augment their on-premises collaboration capabilities in the interim (benefiting Sitrion).

- **Integration:** Sitrion offers additional enhancements that extend the functionality of Microsoft Outlook and, through its Social One mobile strategy, offers a unified experience for workers who need access to business applications (such as Salesforce and SAP) in addition to Microsoft products. As business applications each deliver their own embedded social features, the need for a "social hub" that unifies collaboration across functional boundaries remains a market opportunity.

CAUTIONS

- **Pace of innovation:** The market for social software in the workplace is fragmenting as large horizontal vendors create cloud office platforms and business application vendors embed collaborative capabilities across their environments. What's left is space for a social hub that unifies collaboration across multiple functional business areas. Sitrion must innovate more rapidly to succeed in such a role.

- **Viability:** Smaller vendors can become stretched in terms of research and development and handling many different types of integration. Additionally, as the legacy SharePoint business erodes, Sitrion will need a solid portfolio of solutions more diverse than that which exists today.

TIBCO Software

TIBCO Software is in the Leaders quadrant. Its enterprise social networking product, tibbr, offers a broad set of capabilities and is used for information sharing, communication and collaboration.

STRENGTHS

- **Platform:** tibbr is available both as SaaS and an on-premises product. The majority of customers use the multitenant public cloud option, although for the largest and most sensitive deployments the private cloud or on-premises options are preferred. Apart from its comprehensive capabilities, tibbr emphasizes hierarchical, top-down information organization; tasks and idea management; and mobile support with location awareness.

- **Integration:** tibbr integrates with multiple conferencing providers, such as Cisco (WebEx), Microsoft (Skype) and Google (Hangouts), as well as with business applications and multiple content repositories (including Microsoft SharePoint, Box, Google Drive and a deeper partnership agreement with Huddle). Integration with SharePoint covers dynamic profile synchronization, federated search and autosynced conversations between the two systems, as well as the ability to use SharePoint as a content repository. With respect to integration with other TIBCO products, there is progress both in technical integration (for example, with Spotfire for BI) and in terms of product bundles.

CAUTIONS

- **Viability:** During the past year, we have noticed a declining interest in tibbr. One explanation is that this is a natural consequence of the repositioning changes due to TIBCO becoming a private company again. Tibbr is now part of the infrastructure division of TIBCO, leveraging its shared services for marketing and support rather than having tibbr-specific operations. More importantly, tibbr is now positioned more clearly as a value-added product to existing product lines, targeting existing customers. Although in the short term this will sharpen the focus for tibbr and the value proposition for customers, the loss of momentum as a stand-alone product may become problematic in the longer term.

- **Customer experience:** tibbr reference customers rated TIBCO very low in its ability to understand customer needs and support them after the sale. Given that satisfaction with the functionality of the product and overall satisfaction were average, one plausible explanation of the low support scores is the changes in the way tibbr has been repositioned within the TIBCO organization.

- **Strategy:** Although TIBCO joined this market at a time of growing interest in social software, and has executed reasonably well so far, in the long term it will need to do more to differentiate tibbr from the offerings of its numerous competitors.

VMware

VMware appears in the Challengers quadrant. Its VMware Collaboration Bundle is used for information sharing, communication and collaboration, and combines Socialcast with AirWatch Video and AirWatch Content Locker.

STRENGTHS

- **Customer experience:** Customers generally report very good experiences with Socialcast, positively commenting on the vendor's understanding of business needs, willingness to provide assistance during implementation and postsales technical support, as well as pricing and contract flexibility — all positive indicators of an effective sales organization.

- **Functionality:** Evolving synergies between Socialcast and AirWatch technologies expand the solution footprint of VMware's overall social software solution and position the company to further exploit mobility trends. Socialcast was already a fully-featured ESN application supporting both cloud and on-premises deployment.

- **Vision:** VMware recognizes that social software needs to be a contextual experience across a wide range of computing and application experiences, and continues to execute on this theme through integration and bundling of Socialcast and AirWatch technologies.

CAUTIONS

- **Strategy:** VMware is not often associated with the collaboration and social software in the workplace. While the company is well-respected as an infrastructure and operations provider, to gain visibility with business strategists it needs to improve its brand recognition and its access to line-of-business and HR decision makers involved in business processes and workforce concerns.

- **Ecosystem:** To succeed in the social software market over time, VMware needs to cultivate additional relationships with independent software developers, integrators, professional service organizations and other types of consultancies to provide a broader array of add-ons and customized packaging of collaborative solutions.

Zyncro Tech

Zyncro Tech is a Niche Player. Zyncro, its social networking product, is used both for internal collaboration and external communities (for example, for customers, citizens and partners).

STRENGTHS

- **Focus:** Zyncro Tech is sharpening its focus on supporting interactions at the boundary between internal and external communities and collaboration — for example, where employees need to go back and forth between internal collaboration workspaces as well as participate in external peer-to-peer customer communities. To do this, Zyncro helps to manage multiple user constituencies.

- **Strategy:** Zyncro Tech has focused on geographies where it can become an attractive option for customers and make inroads into regional markets for social software in the workplace. It has a presence in Europe (where it is based), as well as an expanding presence in Mexico and other Latin American countries. To gain scale, Zyncro relies on partners for sales and support in other regions.

- **Product:** Zyncro Tech offers a comprehensive on-premises or cloud-based suite of capabilities that goes beyond social collaboration and includes support for document repositories, electronic forms, tasks, real-time collaboration, location awareness and sophisticated support for Web accessibility. Zyncro also offers customized solutions, based on its technology, which have attracted some large customers looking for tailored sales support or recruitment applications.

CAUTIONS

- **Viability:** Zyncro is a naturally good fit for organizations looking for a broad and flexible platform to support collaboration and engagement with different user constituencies. However, Zyncro often fails to displace other collaboration products that are used specifically for employee collaboration. In the longer term, therefore, although Zyncro Tech may be successful in positioning its product for specific multiconstituent use cases, it needs to do more to establish a stronger position as a general-purpose collaboration vendor.

- **Visibility:** Zyncro Tech rarely appears on shortlists and needs to do more to improve its visibility and mind share.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

No vendors have been added since the last Magic Quadrant on this topic.

Dropped

The following vendors, which appeared in last year's Magic Quadrant, are not included in this year's (see also the Notable Absences section below):

- Acquia

- OpenText

- Zimbra

Inclusion and Exclusion Criteria

The vendors included in this Magic Quadrant offer products that meet both our qualitative market relevance criteria and quantitative market presence criteria.

Qualitative Market Relevance Criteria

To be included in this Magic Quadrant, 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 also support the following functionality, at minimum:

- User profiles

- Group spaces

- Content sharing

- Discussions

- Blogs

- Wikis

- Search

- Activity streams

Quantitative Market Presence Criteria

To be included in this Magic Quadrant, a vendor must also meet the following criteria:

- Worldwide, the vendor must have at least 100 employees in its organization dedicated to developing, marketing or supporting the relevant social software product.

- In its latest fiscal year, the vendor must have generated at least $18 million in revenue that can be attributed exclusively to the relevant product.

- The vendor must have among its paying customers at least 20 organizations with active deployments for at least 10,000 users (excluding freemium and open-source users).

- At least 400,000 named users (or equivalent) among all the paying organizations must be licensed to use the vendor's relevant product and be actively using it (excluding freemium and unsupported open-source users).

- The vendor must have a presence in at least three geographic regions, or at least five partners in each region with some personnel dedicated to selling or supporting the relevant product.

Evaluation Criteria

Ability to Execute

Product or Service: The overall product or service functionality rating for each vendor was reached by evaluating specific functionality that is already available and, in particular, the extent to which the product goes beyond the baseline functionality required for inclusion. Examples of the functions and features we looked for are social network analysis, browser-based productivity suites, dynamic activity streams, document repository integration, social tagging, social bookmarking, social search, general analytics, expertise location, group formation based on common interests, content/people ratings, people/content recommendations, offline support and native mobile clients. We also took into account the product's ability to serve large numbers of users (more than 5,000), and we gave each product a subjective "usability" score.

Overall Viability: Key aspects of this criterion are the vendor's financial health — including funding, who is investing in and backing its activities, its revenue growth and profitability, and the degree to which the vendor is committed to this part of its business.

Sales Execution/Pricing: This criterion concerns the vendor's ability to sell to large organizations, the total number of active users among all the vendor's customers, its price transparency, the straightforwardness of its sales process and the total number of sales employees.

Market Responsiveness/Record: This criterion was not rated as we could not identify sufficiently independent and measurable factors that would make a difference to the vendors' relative positions.

Marketing Execution: We looked for evidence of mind share, thought leadership and brand recognition, and for any specific marketing initiatives (white papers, events, microsites, leadership blogs and social media campaigns) that may have helped to promote the vendor. We also took into account the size of each vendor's marketing organization, the mind share of each vendor based on our conversations with Gartner clients, and the mind share of each vendor based on comments from reference customers about the products they evaluated.

Customer Experience: We collected customer feedback from vendor-supplied references, discussions with users of Gartner's inquiry service and other customer-facing interactions, such as those at Gartner conferences. We also looked at the presence of active customer communities for peer support, the complexity of deployment and migration, and the level of control a customer has over a SaaS deployment (for example, to decide when to upgrade, or to upgrade selectively).

Operations: Factors considered included the quality of the vendor's organizational structure — skills, experiences, programs, systems and other means of enabling it to operate effectively and efficiently on an ongoing basis, as well as the overall size of the vendor's collaboration and social software business (in particular, the number of dedicated employees). We also looked at numbers of technology and service partners, and for any training and certification programs.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria
Product or Service
Overall Viability
Sales Execution/Pricing
Market Responsiveness/Record
Marketing Execution
Customer Experience
Operations

Source: Gartner (October 2015)

Completeness of Vision

Market Understanding: Each vendor needs to demonstrate a strategic understanding of collaboration and social software opportunities, such as an understanding of the business value of social interaction support as well as exhibiting an understanding of the realities of market dynamics in this competitive market. We looked at the specific ways in which different products support different use cases. We awarded higher ratings to products that could deliver sustainable differentiation (such as a platform that attracts third-party development), adjacency advantages, exceptional innovation and end-user attraction.

Marketing Strategy: This criterion assesses the degree to which each vendor's marketing approach suits (and/or exploits) emerging trends and the market's overall direction. In particular, we looked at the use cases promoted in each vendor's marketing messages to specific buyers, online activities, and any programs for educating and "priming" the market connected with social interaction support (for example, freemium, "try before you buy," open-source and hosted versions). We also assessed the quality of each vendor's online presence.

Sales Strategy: Apart from assessing the vendor's overall sales plans, we looked at its ability to engage with both business and IT decision makers, ability to sell across vertical markets, presence in vertical-market sales programs, and any opportunities for cross-selling or converting large numbers of early adopters into enterprisewide deployments.

Offering (Product) Strategy: We assessed the degree to which each vendor's product roadmap reflects demand trends and opportunities to create demand. We also looked at the breadth of each vendor's offering or preintegration with related services. In addition, we rated each vendor's cloud delivery plans and the availability of a marketplace that encourages partners and developers to add value to the product.

Business Model: This criterion was not rated as we could not identify sufficiently independent and measurable factors that would make a difference to the vendors' relative positions.

Vertical/Industry Strategy: This criterion was not rated, as we could not identify sufficiently independent and measurable factors that would make a difference to the vendors' relative positions.

Innovation: This criterion considers the degree to which each vendor invests in research and development for relevant tools and the extent to which it demonstrates "creative energy." Examples of innovative capabilities we rated include real-time editing with multiple authors, browser-based audio and video capture, the ability to

"mute" a specific user, earning and spending virtual currency, geolocation tags, marketplaces with transaction handling, Content Management Interoperability Services (CMIS) support, and development tools for UI layout and interactivity.

Geographic Strategy: We examined each vendor's strategy to direct resources, skills and offerings to meet the specific needs of customers in regions other than that in which its corporate headquarters is located. More specifically, we looked at the availability of the product in multiple languages, the vendor's presence in different geographies, and its ability to deliver cloud services via region-specific data centers.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	Medium
Business Model	Not Rated
Vertical/Industry Strategy	Not Rated
Innovation	High
Geographic Strategy	Medium

Source: Gartner (October 2015)

Quadrant Descriptions

Leaders

Leaders are well-established vendors with widely used social software and collaboration offerings. They have established their leadership through early recognition of users' needs, continuous innovation, significant market presence, and success in delivering user-friendly and solution-focused suites with broad capabilities.

Challengers

Challengers offer solutions that have a strong market presence, and they have the market position and resources to become Leaders. But these vendors may not have the functional breadth, marketing strategy or pace of innovation of Visionaries. Challengers have established presence, credibility and viability, and once their products move beyond a "good enough" baseline, they are likely to use their customer base to overtake competitors and enter the Leaders quadrant.

Visionaries

Visionaries demonstrate a strong understanding of current and future market trends — such as the importance of a flexible and transparent collaboration environment, as well as the value of mutual reinforcement of tools that encourage user contributions and tools that encourage bottom-up group and structure formation. Their products and product roadmaps display a tendency for innovation, especially in terms of architecture and lightweight integration, while their marketing and research and development efforts are often boosted by alignment with marketplaces and developer ecosystems. Visionaries do not exhibit the scope of delivery of Challengers or Leaders, but they have demonstrated strong vision across a range of capabilities.

Niche Players

Niche Players provide useful, focused technology, understand the market's changing dynamics and strive to evolve their products' capabilities. However, they are held back by a narrow range of functionality, a lack of clarity in their roadmap about how and when they will remedy this shortcoming, or a lack of market traction. Many of the smaller Niche Players may enjoy considerable success relative to their size, but they need to exploit every opportunity to improve their positions before their competitive differentiation is eroded. As the social software market matures, pockets of specialization may solidify. Therefore, a viable alternative strategy for a minority of the smaller vendors is to focus on niche sectors for specific industries or activities. Many of these vendors are unlikely to break out of the Niche Players quadrant, even though their businesses may remain viable in the long term.

Context

Social software delivers virtual environments where people can find out about each other, discuss topics, share information and generally interact with each other on a personal, one-to-one level or in groups, teams, communities and networks (in the context of structured or unstructured business activities).

Social software can be used in very purposeful ways to get work done, handle exceptions and make decisions. It can even augment physical environments. Business benefits from using social software result from improved communications, the ability to influence behavior and the opportunity to gain insights into specific activities around which social interaction occurs. Usually, the benefits require behavioral changes that depend on organizational change practices. The risk of behavior change, culture clashes, privacy concerns and questions about worker productivity and content quality highlight the need for caution. Evidence of successful social software deployments continues to grow, but large-scale, sustained improvements are still not widespread.

This Magic Quadrant assesses the relative strengths and weaknesses of the main players in the market, according to a variety of criteria. The positions of the vendors result from a combination of surveys, other research and client reference checks; also, input from all the Gartner analysts who cover social software, ongoing vendor briefings, and interactions with buyers and investors.

Gartner's Magic Quadrant for social software in the workplace is a useful starting point from which to identify and evaluate relevant vendors. In each case, however, selection of an appropriate product and vendor should be based on a detailed evaluation of an enterprise's specific requirements and objectives. Depending on the complexity and mix of specific requirements, each shortlist may be unique. This Magic Quadrant should be used as part of due diligence, while exploring the market further to qualify the capacity of each vendor to address any unique business requirements and technical concerns. Just because a vendor appears in the Leaders quadrant, that does not automatically make it the right choice for a buyer's specific needs.

Market Overview

While the social software market remains somewhat dynamic, there are increasing signs of maturity and consolidation as well as impact from market adjacencies that are embedding social software capabilities. Gartner estimates that the size of the enterprise social software marketplace was approximately $860 million in total software revenue worldwide in 2014, a growth rate of approximately 6% from 2013.

Additionally, collaboration suite solutions are increasing overlapping with the enterprise social software technologies, with many vendors offering complementary products. Gartner estimates that the size of the collaboration suite market in 2014 was $1.4 billion in total software revenue worldwide, a growth rate of approximately 16% from 2013 (see "Forecast: Enterprise Software Markets, Worldwide, 2012-2019, 3Q15 Update").

The social software market is influenced by changes on the demand side, in terms of what buyers want and need, and by the availability of relevant products on the supply side. It is also affected by market trends in areas adjacent to social software as other markets increasingly include collaborative and social capabilities. Examples of such adjacent markets include: CRM, business process management, project management, and human resources management. Mobile messaging vendors such as Slack are also becoming associated with application scenarios previously thought to be handled by ESN vendors. Even consumer vendors such as Facebook (with its Facebook at Work solution) are poised to enter the market.

The most important decision makers for social software investments are IT leaders (more than 40%, according to our 2014 Magic Quadrant reference survey; see "Survey Analysis: High Hopes and Mixed Results for Social Software in the Workplace"). However, as social software capabilities become embedded in applications in other markets, business leaders could have a greater role in those decisions. What we can postulate is that decisions on vendors in this market are still largely influenced by IT; however, non-IT decision makers could be more involved when social capabilities are contextually bundled in another buying decision that involves business systems. This reflects the increasingly fragmented nature of social software.

When we first started covering this market in 2007 (see "Magic Quadrant for Team Collaboration and Social Software, 2007;" *this research is provided for historical perspective; portions of this document may not reflect current conditions*), the main factors that influenced the decisions of those IT leaders were the maturity of the products and the readiness of vendors to support them. At the time, IT leaders would be satisfied with something that actually worked and that allowed them to introduce some new capabilities to their organization in order to support more flexible conversations, introduce team workspaces and create and share content. Today, given that both the products and the organizations behind them are more mature, it can be taken for granted that in terms of core collaboration and social capabilities it is hard to differentiate between available products. Although there is always scope for innovation in terms of functionality, it is already noticeable that the thorniest issues that IT leaders face when choosing between products — and the source of long-term differentiation for vendors and products — increasingly have to do with embedding collaboration and social capabilities in the context of work, wherever that happens to be. If this trend continues, we will need to adjust our evaluation criteria and advice to buyers in order to distinguish between products that can be bought and deployed quickly as stand-alone applications, and those that can provide collaboration and social capabilities embedded within the context of other applications.

Below, we discuss in more detail the most common issues that shape buying decisions, including considerations about embedding collaboration and social capabilities in the context of work.

Difficulties in Articulating Business Value

Many buyers still struggle to articulate the business impact of social software and are looking for peer validation in their industries before making a decision. The perceived risks from social software (especially in regulated industries) can also delay decisions, but they are usually not the main obstacle.

Recommendation: Although IT leaders should have a leading role in technology-purchasing decisions, they should work closely with business colleagues to evaluate the relevance and benefits of social software and any additional products or services to address compliance or other governance needs. IT leaders should also secure commitment that business areas will include organizational change practices to address cultural aspects of social software adoption.

Difficulties in Justifying Further Investment

Despite generally positive experiences, some users of social software struggle with issues of effective use and business relevance, especially where the software's deployment is treated purely as an IT project. Even where effective use and relevance are not in question, business impacts are generally not well-tracked or measured, which makes it more difficult to justify significant follow-on investments in technology or change management.

Recommendation: IT leaders should work with business colleagues to identify appropriate business metrics that reflect the impact of their social software investments. These should be used not only when considering additional investments, but also on an ongoing basis to monitor and fine-tune existing initiatives.

Complexity in Embedding Social Capabilities in the Context of Work

Technology decisions about social software are becoming more difficult to make independently of the rest of an organization's communications, information management systems and business applications. Although targeted investments in pure ESN applications can happen quickly, other considerations complicate follow-on or more strategic investments. In particular, the relationships between social software (especially ESN applications) and intranets, portals, content management systems (including EFSS tools), mobile messaging, unified communications, cloud office and business applications tend to be complex, because there may be a need to collaborate or discuss content or data that is managed in these other environments, and vice versa.

Recommendation: As social interaction needs to permeate existing business activities in order to be effective, the technology to support these interactions also needs to become entwined with other technologies and systems. Depending on requirements, making the right decision requires clarity about what the solution should look like (including the integration points and information flows between systems) and how it can support the business. Once the desired solution is clear, a careful gap analysis should be conducted to determine what investments or steps are necessary in order to achieve it, given existing investments or other constraints.

Social Environment Fragmentation

Some organizations are beginning to experience fragmentation in their social and collaboration environments as a result of having multiple products with similar capabilities. This is often a result of buying different packaged applications (for other reasons) that include social capabilities — as a result of different parts of the organization buying different social software products, or simply because there was some other reason to do so. While there can be cost implications from this type of redundancy, as well as impacts to cross-organizational/cross-functional interactions, there can be positive gains to consider in the functional area where social software has been optimized for a particular business activity.

Recommendation: IT leaders need to adopt a business view of social software that will often require the use of multiple social software solutions (especially when these capabilities are embedded into the applications themselves). Pursuing a technology-centric view can optimize the technical environment down to a single vendor product, but can easily cause unintended consequences that impede effective collaboration in areas where a more contextualized employee experience "in the flow of work" can show better results. Clearly, unnecessary multiple deployments should be avoided. However, a balanced response will optimize business value and then seek to integrate multiple social software environments to address cross-boundary information sharing and collaboration needs, where necessary. IT organizations will need to prepare for managing a more diverse portfolio of social software capabilities as they proliferate across numerous vendor products.

Insufficient Emphasis on Usability and the User Experience

Most organizations do not pay enough attention to usability and the end-user experience when choosing or deploying social software solutions. The success of these solutions depends on individuals choosing to engage through them. Compromises in mobile support, limited access from outside the firewall, poor integration with email, an inability to invite external participants, sluggish response times, unintuitive UIs and uninspiring design are all reasons for poor user acceptance and, ultimately, failure.

Recommendation: IT leaders should understand that usability and the user experience cannot be assessed through RFPs. Once the number of products under consideration has been reduced to a manageable two or three, we recommend hands-on testing of the user experience. Most vendors of social software can set up trial environments (usually cloud-based) in minutes; if a vendor cannot to do so, this should serve as a warning about the usability and flexibility of its products. These trial environments should be used to test a comprehensive set of typical scenarios with specific outcomes and a cross-section of users. Things to look out for include: the

ability to achieve what is needed without training or a manual; system feedback and responsiveness; and how much effort is required to complete specific tasks. Decisions should also take into account how candidate software compares with other systems that users already have access to and which could be used as alternatives — such as email and consumer products for file sharing and collaborative authoring.

Notable Absences

Some important vendors did not meet all the inclusion criteria for this Magic Quadrant. They typically lack sufficient market penetration in terms of relevant use cases, or they target areas of functionality not covered by the inclusion criteria. Nevertheless, they should still be of interest to prospective buyers of social software for the workplace:

Acquia provides Acquia Platform, a platform-as-a-service offering for Drupal, and commercial support and enterprise services relating to the open-source Drupal distribution. Organizations favoring an open-source approach to social software in the workplace can use the Drupal Commons distribution, which runs on top of the Drupal Web content management base platform. Acquia is a growing organization that sells products and services to support and host internal and external-facing websites.

Atos offers blueKiwi, a social networking product with comprehensive functionality and an engaging user experience, on a platform that can support internal networking and external communities on multiple devices (mobile and desktop). Operating as an independent subsidiary of Atos (Europe's second-largest IT service provider), blueKiwi benefits from Atos' market presence and resources, especially in terms of pursuing a SaaS strategy tailored to large, demanding customers. It also forms the cornerstone of Atos' "Zero email" initiative for replacing email with social networking, a capability Atos offers to its own customers.

Bloomfire is a relatively young organization, founded in 2010. It offers a social collaboration and knowledge-sharing platform that can be used for employee training and onboarding, sales and marketing enablement, customer service, and more. It has comprehensive functionality, with an emphasis on usability and engagement that includes support for content creation, capture and organization, expertise location, Q&A, gamification and information filtering. It is a cloud-only platform that uses Amazon Web Services and integrates with other cloud business applications, such as those of Salesforce ; content repositories, such as those of Box, Dropbox, Google (Google Drive) and Microsoft (SharePoint); as well as with LinkedIn profiles.

eXo is best known for eXo Platform, an open-source social collaboration platform that is built on a portal foundation and available both as a cloud service and on-premises. This vendor targets social intranets and team collaboration with a set of built-in apps

(forum, calendar, wiki, social networking and so on), in addition to support for content management, real-time collaboration and an integrated development environment.

harmon.ie specializes in making it easier for users to cooperate and to share and access documents stored in Microsoft SharePoint and Office 365, without having to access SharePoint directly. It does this with a mobile app and with several email client plug-ins (for Microsoft Outlook and Outlook Web Access and IBM Notes). The harmon.ie app and plug-ins support conversations via Microsoft Skype for Business and Yammer, activity streams and people searches, as well as document and email sharing and editing through SharePoint, Office 365 and OneDrive for Business — making it easier to synchronize activities across desktop and mobile devices and collaborate on documents and emails stored in SharePoint or Office 365. Now in public beta, the harmon.ie Collage product aggregates alerts, notifications and information from different sources into a unified activity stream. Using machine learning and natural-language processing, Collage extracts common topics from applications, documents, social tools and email, so workers can take the appropriate actions.

Interact offers an out-of-the-box social intranet platform with broad capabilities, including team workspaces, Q&A, collaboration and intelligent communications, as well as substantial support for process modeling (through electronic forms, workflows and tasks). "Intelligent" content algorithms help to focus communications. The product is quick to deploy and available with cloud-based self-service and on-premises hosting options.

Micro Focus (Novell) Vibe is a mature collaboration product that is usually deployed for project and team collaboration, networking, and knowledge management for internal and external teams. It combines team and personal workspaces with self-service layout controls; productivity capabilities that include team calendars, surveys, task management and rich workflow support; social capabilities such as activity streams, wikis, discussions and blogs; and a content repository that supports content workflow, library services (check-in/out), document commenting and document organization.

Neudesic , best known as a technology service provider and independent software vendor, offers Neudesic Pulse, an enterprise social collaboration application. Pulse is available as an on-premises social platform and via a managed cloud service that combines social features and a social-centric approach to preintegration with Microsoft SharePoint, SAP and other CRM applications, as well as a variety of line-of-business systems. A specialist version of Pulse, called The Firm Directory, is an expertise location application that ships with a legal skills taxonomy and targets the legal services industry; other industry variants of The Firm Directory target the professional services and higher education industries. Core features of Neudesic

Pulse include activity streams, groups, finding experts (with support for profile peer endorsements), file sharing, Q&A, badging, leaderboards and task management, giving organizations an integrated collaboration platform, knowledge repository and expertise discovery system.

Redbooth (previously known as Teambox Technologies) offers a collaboration platform with a large set of capabilities that include file sharing, communication (including messaging, audio calls, group videoconferencing and screen sharing), and rich email integration. In addition, extensive support for task management, search and reporting make Redbooth particularly suitable for structured collaboration. Its product is available in multiple languages both as a cloud service and on-premises.

Verint Systems acquired the Telligent business and technology from Zimbra in August 2015. Verint provides a customer engagement optimization portfolio that includes unified solutions for engagement management, as well as for workforce optimization and customer analytics. The company is positioned as a Leader in the customer engagement center workforce optimization Magic Quadrant and as a Niche Player in the CRM customer engagement center Magic Quadrant. The addition of Telligent's community solution positions the company to strengthen its customer engagement capabilities while also expanding into a more general-use role within the enterprise. Telligent is a longtime participant in the social software in the workplace Magic Quadrant. The Telligent Community solution is used for creating employee communities and as an ESN environment for project and team collaboration. It can also be used for creating external, branded customer and partner communities. Telligent social communities complement other solutions previously acquired by Verint (such as those from Kana Software and Vovici). Initially, Telligent will run as its own operating unit within the Verint Systems business; operating in a new company may cause some short-term challenges as Verint becomes more familiar with new business use cases and application scenarios.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will

continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.