The Aragon Research Globe™ for Social Software, 2015: Knowledge at the Core

This Aragon Research Globe™ for social software evaluates 22 ESN providers who each focus on the core problem of sharing knowledge. The market for ESNs has matured and as buyers look to rationalize their investments, this Globe Report provides a guide as to who is doing what in the market.

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Introduction

Social Software is at an inflection point in the market. There are many enterprises that still struggle with the purpose of an ESN, while others have harnessed them to enable knowledge sharing across their enterprise. In the long-term, Social Networks (aka Communities) are really about sharing Knowledge. In fact, many enterprises we have spoken to position their Community as a Knowledge Network. Enterprises that have harnessed this power of Social Collaboration have done so by having clear use cases and active communities.

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

Also prevalent today is the realization that in some cases, the ESN that was adopted originally may not meet the needs of the current enterprise. Some vendors have minimized their focus on the Social Business Category, or even retreated, including, but not limited to, Sitron and Tibco.

The Evolution of the ESN Market

The “feature wars” between vendors that were prevalent in the early days of the ESN market (i.e. the bells and whistles) are giving way to more of a focus on integration and outcomes. At the same time, the way people collaborate is shifting to include a greater emphasis on Mobile.

As previously stated, use cases are critical to a successful Social Deployment; the need to keep content up to date and current is another key aspect. Today, Social Business offerings are more focused on content and context than ever before, while also focusing on the need to connect people to each other.

Social Business and the Need to Collaborate

The big shift in enterprise social networking (ESN) is the shift to social business applications. What is happening in software overall is also reflective of what is happening in Collaboration. ESNs are becoming more contextual – and in some cases, more integrated into key business processes. What this means is that ESNs are becoming more of a collaboration
platform versus a separate, isolated tool. Content has become much easier to integrate and activity feeds for many offerings have become far more contextual.

Furthermore, Social Business networks are morphing to become Social Business applications that integrate with existing applications to allow users to get the work done. Many providers are accomplishing this with a combination of approaches. Some are adding native integrations with their existing products. Others have added integrations with third-party apps via a store or app exchange integration.

**ESNs and Video**

More than anything else, the content that users want to share the most is video. Many ESNs can share video links, but many do not allow the user to upload and manage video as a piece of content. This is an important consideration when it comes to the idea of an ESN as a Knowledge Network.

However, more ESN providers are beginning to recognize this and are partnering in order to bring video capabilities into the network. Only a few providers, such as Socialtext, offer full video content management. Most others are partnering with providers such as Kaltura, Panopto, Qumu and uStudio.

**ESNs and Mobile**

Enterprise Social Software has a new lead story – and it’s called Mobile Collaboration. Mobile apps that feature messaging as the main activity feed have become prominent over the last twelve months and have grabbed the attention of users. If there is any area for improvement for many of the ESN providers, it is on the Mobile App experience. Jive is one of the best examples of this trend and others are expected to follow.

That said, many providers still offer basic mobile capabilities. Though some are working on new Mobile First Apps, they often don’t integrate well with the core Community engine. This is one of the reasons for the explosion of standalone Mobile Collaboration category (See the Aragon Research Note titled: The Disruptive Rise of Mobile Collaboration).

**The Shift to Predictive – We’re Still in the Early Days**

Social Networks will undergo a revolution due to the shift to machines that understand user behavior – this shift means that recommendations will give way to content delivery at the time of need. More providers are adding Predictive and Prescriptive capabilities to their offerings (e.g. IBM, Huddle, Microsoft), but there is still room for improvement, since very few providers currently offer Predictive capabilities.
Productivity in the ESN

In ESNs, the core organizing principle is still the group – a unit of organization that people can work in, and which common interests, activities or objectives serve to unify. Groups allow people to do multiple types of things that all involve, engage and benefit the group. Have a meeting, discuss a project, or assign tasks: these activities can all happen in a group.

Moreover, groups are still at the core of how people get things done. The shift we have seen is that more innovative approaches allow groups to be created based on certain actions and that users can post content to one or to multiple groups. Creating a course that may automatically add a student to a Social Learning Group is an example of the former, while collaborating around a deal in a Social Selling Group is an example of the latter.

ESNs as Knowledge Networks

One thing for enterprises to consider is the fact that an ESN, when deployed and integrated properly, becomes a repository of knowledge – otherwise known as a Knowledge Network. Knowledge is stuck in many places in an enterprise, including email systems, content management repositories and in vertical applications (ERP, HCM and CRM). That is one of the reasons that some ESNs are more successful and valuable than others.

People are also keepers of knowledge (i.e. Tacit Knowledge). When they participate in an ESN or a Community, they share their knowledge that is then part of system. We would note that today one of the popular ways to share knowledge in 2015 is via video.

So when looking at where your knowledge is in the enterprise, consider the Social Network as the hub – where people find and access knowledge. Connecting various systems is key and as Predictive Analytics comes online (and becomes how search is used), the knowledge will be able to be located and leveraged faster.

Focus on Outcomes

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

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

![Diagram of ESN Knowledge Sources](image)

**Figure 1: Leveraging a Social Collaboration Network to deliver Business Outcomes.**

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

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

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

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

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

Dimensions of Analysis

The following parameters are tracked in this analysis:

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

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

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

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

**R&D**: Investment in research and development as evidenced by overall architecture.

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

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

The market reach evaluation includes:

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

**The Four Sectors of the Globe**

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

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

**Inclusion Criteria**

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

The inclusion criteria for this Aragon Research Globe are:

• A minimum of $5 million of primary revenue for social software or $15 million in a related market (collaboration, content management or portal/UX software).
• Shipping product: Product must be announced and available.
• Customer references: Vendor must provide at least three customer references in each region where it does business.

Exclusions
The following vendors were excluded from this Aragon Research Globe:

• Mindjet
• OpenText
• Oracle

New Additions
The following vendors have been added since our 2014 Globe was published:

• Atlassian
• BraveNew
• Neudesic
The Aragon Research Globe™ for Social Software, 2015
(As of October 26, 2015)

Figure 2: The Aragon Research Globe™ for Social Software, 2015.
Leaders

Huddle

With a new infusion of capital and a new CEO, Huddle is well positioned to serve as a work tool that leans heavily on its Content Management base, but does so with an ease of use in collaborating around content. Like others, as the market continues to mature, the focus for Huddle will be on critical use cases. Today, Huddle is about being productive at work as well as external activities. Huddle has been a pioneer in enabling work productivity but has also set the standard around Predictive Content, since it can recognize usage patterns and have the content that the user will most likely need synced and available on the tablet. The future of work is all about Predictive applications, and we expect others to follow Huddle’s lead here.

Huddle continues to execute in Europe and North America with a growing focus on specific use cases. It’s ideal for professionals on the go who need to share and collaborate around content that is being accessed from mobile devices.

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<th>Strengths</th>
<th>Challenges</th>
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<tbody>
<tr>
<td>Ability to collaborate with people and content</td>
<td>Awareness in the U.S.</td>
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<td>Predictive Content</td>
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<td>Mobile experience</td>
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<td>Ease of collaboration</td>
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IBM

Since IBM has branded all of its Collaboration offerings, including Social, under its Connections brand, it has also been redefining the email strategy away from IBM Notes to IBM Verse. IBM Verse, which is as close to a Predictive Workplace app as we have seen, is included in the IBM Connections Cloud service, which includes Social Business, email, instant messaging, web conferencing, file sharing and document editing. IBM’s lead offering is IBM Connections Cloud S1 which includes IBM Connections and IBM Verse.

Additionally, IBM Connections is integrated with IBM’s Content Management system and is being leveraged across the IBM software portfolio, including its social HCM (Kenexa) product line, which offers video collaboration. With its growing set of partner apps, IBM Connections can be configured to meet multiple business user needs. This will help to simplify IBM’s broad portfolio for buyers interested in broader Collaboration and Social Business capabilities.

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<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
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<tbody>
<tr>
<td>• Global presence</td>
<td>• Ease of adding external users to a Community</td>
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<td>• Analytics</td>
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<td>• Predictive Capabilities</td>
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<tr>
<td>• Social HCM capabilities (Smarter Workforce)</td>
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<td>• Native mobile apps</td>
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Jive Software

Jive continues to execute in the ESN market in a year that featured the promotion of Elisa Steel to CEO as well as a solid cadence of new customer wins. Jive recognized the shift to Mobile Collaboration and it is one of the few ESN Providers to offer a fully featured Mobile Collaboration suite of Apps, called Jive Workstyle Apps (Jive-w), which is integrated with the Jive-n social networking platform.

As an enterprise social software pioneer, Jive was one of the first to introduce an app market to enable integration into other systems and extend its own capabilities. Enterprises typically choose the Jive platform for information sharing, for internal communications around projects and collaborating around specific business processes, and also for external communications and support with their own customers. Customers note that the Jive UI is user friendly and that it enables easier information sharing throughout the enterprise.

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<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
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<tr>
<td>• Global awareness</td>
<td>• Enterprise customers note cost can be a challenge</td>
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<tr>
<td>• Partner apps/Ecosystem</td>
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<tr>
<td>• Mobile apps</td>
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Lithium

Lithium, based in San Francisco, has been focused on Customer Communities, which today remains its primary go-to-market strategy. Featuring gamified encouragement of users to participate in Communities, Lithium has become one of the go-to options for Customer Communities.

In 2014, Lithium upped the ante with its purchase of Klout, giving it more capabilities in Social and User Centric Digital Experience. With an increasing focus on the Marketing buyer, Lithium is well positioned for the era of Digital Experience Management, which is all about serving individuals, not just users.

**Strengths**
- Customer and Support Communities
- Focus on Digital Experience
- Gamification of the experience
- Brand Awareness

**Challenges**
- Heavy focus on Discussion Forums

Microsoft

Yammer is still the lead Collaboration solution for Microsoft Office 365 and there have been gradual updates to the platform in 2015. Most of the updates have focused on usability and on improving how Office Documents are shared in Yammer. Yammer is still one of the simplest ESNs to allow for external collaboration, and doing so requires minimal System Administration overhead. One of the new updates to Yammer is that Office 365 Video will now integrate with the Collaboration solution, something customers will like.

This overlap with Office 365 is in part due to Microsoft’s addition of Office 365 Groups, which created market confusion; Yammer is now more integrated with Office 365 than it was last year. Given the success of Office 365, Yammer remains a compelling use case for a Social Intranet.

**Strengths**
- Office 365 integration – Office Documents
- Ease of use
- Creating External Communities
- Partner app ecosystem

**Challenges**
- Ease of Integration with OneDrive and SharePoint
SAP

SAP Jam continues to represent the major shift toward Social both integrated with, and in the context of, business applications and processes. Because of its deep traction in enterprises in areas such as HR, CRM and sales, SAP Jam is able to bring social capabilities at the process level where people actually work. Also, being tied to the HR system of record, Jam brings richer profile information about individuals, a critical factor to allow for tacit knowledge to be shared.

SAP Jam has been experiencing strong growth in enterprises, and now has more than 20M users. Jam supports integration with Microsoft SharePoint and Outlook keeps it in line with workflows in the wide range of environments using Microsoft technology daily. Also, Jam supports integration with systems outside of SAP, such as SugarCRM, Alfresco, and Microsoft SharePoint.

**Strengths**
- Collaborative business processes with contextual data integration
- Large base of social learning subscribers
- Advanced mobile application capabilities
- Developers’ ability to customize, embed, integrate and extend

**Challenges**
- Awareness outside of SAP accounts

VMware

VMware’s Socialcast is an enterprise social networking solution typically used for team collaboration and information sharing. Its strategy is deep integration with Socialcast and the rest of its end user products, such as the AirWatch Content Locker. Socialcast focuses on the activity stream, which is the hub of collaborative interactions between people. It can be deployed in the Cloud or on-premises and supports tasks and project management capabilities.

The new VMware Collaboration Bundle is a Mobile Collaboration offering which encompasses the AirWatch Content Locker, Socialcast and the AirWatch Video product. This bundle, which incorporates social, video services and content, is positioned to bring context to collaborative interactions and support the emerging mobile workforce and Mobile Collaboration.

**Strengths**
- VMware ecosystem
- Tasks and Project management
- Content Collaboration Bundle mobile platform

**Challenges**
- Awareness with business buyers
Contenders

Atlassian

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

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

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<th>Strengths</th>
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<td>Integrations</td>
<td>Market awareness</td>
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<td>Low cost</td>
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<td>Mobile capabilities</td>
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<td>Application Marketplace</td>
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Liferay

Liferay, which is known as an open source portal provider, also offers an open source social workplace product called Liferay Social Office. Liferay’s suite of offerings includes web content management, workflow and social collaboration services.

While Liferay’s platform is centrally geared towards portal use cases, it does support enterprise social networking capabilities. Usually, enterprises leverage Liferay Social Office to build a Social Intranet or Extranet that allows customers, partners and employees to participate. The Liferay marketplace offers a number of capabilities, including security, that others offer as out-of-the-box features.

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<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Challenges</strong></th>
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<tr>
<td>• Low cost of ownership</td>
<td>• Community Edition requires Marketplace extensions for full ESN capabilities</td>
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<td>• Open source</td>
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<td>• Freemium</td>
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<td>• Web content management (WCM) capabilities are included</td>
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Mzinga

Mzinga, based in Burlington, MA, has been a pioneer in both social learning and external communities. Mzinga has two offerings in the Community space: Mzinga OmniSocial Engaged, its Social Collaboration platform for external communities, and Mzinga’s Online Moderation Services, which offers robust brand moderation services. Some large brands use Engaged, which excels in use cases such as brand affinity and customer support. Large brands count on Mzinga’s Online Moderation Services for professional moderation, which is a critical success factor that can enhance and also protect a brand and the company’s reputation.

Mzinga also focuses on Social Learning via its OmniSocial Learning platform, which caters to both large and small enterprises. It was early in the Cloud and that is why the platform scales well for enterprises where there is a business requirement for participation by an external audience in the ESN (agents, partners, customers, etc.). Mzinga’s flexible “experiences” functionality allows organizations to provide a customized social learning environment for various audiences.

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<th><strong>Strengths</strong></th>
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<tr>
<td>• External communities</td>
<td>• Market awareness</td>
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<td>• Moderation services</td>
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<td>• Social Learning</td>
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<td>• E-commerce support</td>
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Salesforce

Salesforce Chatter is the pervasive social engagement layer for the Salesforce platform and all Salesforce Clouds (sales, service, etc.) Community Cloud uses Chatter as the social engagement layer and is the offering for cross-enterprise social intranet that ties together an entire organization across all office locations, departments and roles. It is frequently a core element of change management, employee communication, internal productivity, HR/IT support or cultural and strategic alignment initiatives.

Salesforce Community Cloud spans multiple use cases, including employee, partner, and customer success communities. This allows Chatter functionality such as collaborative groups, recommendations, file sharing - with integration to multiple repositories - to be available to multiple audiences, including availability via the Salesforce1 mobile app.

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<th>Strengths</th>
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<tr>
<td>• Bundling with Service Cloud</td>
<td>• Competition for Sales Users</td>
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<td>• Open APIs</td>
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<td>• Ecosystem of partners</td>
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TIBCO

TIBCO was taken private in 2014 by Vista Equity. Its tibbr offering has added some new features but the overall focus on tibbr has waned. tibbr is an easy-to-use ESN that allows users to collaborate and do work on any device. tibbr offers a solid mobile app along with task management, content creation and ideation. Increased application integrations such as Salesforce and NetSuite evolve tibbr from a pure activity stream to a collaborative work platform.

tibbr has continued to make it easy to connect to content, and in tibbr 6, it has added increased customization capabilities and a deeper level of questions and answers (Q&A). Finally, because tibbr supports Private Cloud deployments, it may be ideal in certain regulated industries.

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<th>Strengths</th>
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<tbody>
<tr>
<td>• Mobile app functionality</td>
<td>• Enterprise penetration</td>
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<td>• Ease of use</td>
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<tr>
<td>• Third party app integration</td>
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Innovators

Bloomfire

Bloomfire positions its platform as a social knowledge network focused on use cases, such as social learning, customer support and sales enablement. It offers easy-to-use knowledge and Collaboration capabilities focused on content creation and sharing. Bloomfire customers tend to be more mid-market. The Bloomfire product supports the ability to create and share multimedia and interactive content such as HD video, with native webcam and screen casting capabilities. Bloomfire’s support for video content makes it ideal for multiple use cases.

One of the biggest problems with Enterprise Social Networks is the inability to integrate into the flow of how people work. While Bloomfire supports integrations to Salesforce, LinkedIn and Google Apps, as well as leading Mobile Content Management offerings, its recent move to add IBM Watson Analytics to its Solution offering is a move we expect others to emulate.

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<th>Strengths</th>
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<tr>
<td>• Embedded Video Support</td>
<td>• Market awareness outside of U.S.</td>
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<td>• Ease of use</td>
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<tr>
<td>• Mobile capabilities</td>
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<td>• IBM Watson Analytics Integration</td>
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BraveNew

BraveNew, based in San Francisco, focuses on solving the problem that most enterprises have with people and content – sharing knowledge. BraveNew has been steadily growing its client base by focusing on delivering a new, modern and customer-focused Social experience. They focus on three key use cases including Learning, Innovation and Diversity.

One of the things that stands out about BraveNew is its ability to be easily adapted to fit an enterprise’s needs via its community pages and their ability to manage navigation of users. BraveNew also offers clients the ability to use machine learning tools to curate contextually relevant content from across the Internet. This allows BraveNew to be well positioned to help enterprises with their quest to share critical Knowledge.

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<th>Strengths</th>
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<tr>
<td>• Features</td>
<td>• Market awareness</td>
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<td>• Customization</td>
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<td>• Community Pages</td>
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Igloo

Igloo, based in Kitchener, Ontario Canada, continues to focus on Social Intranets, which is still one of the top use cases for Social Business Platforms. Igloo offers a solid mobile experience via responsive design, and one improvement we have noticed is the frequency of updates to their Mobile App.

Igloo’s new framework for building custom widgets, support for open authentication (OAuth) and expanding portfolio of integrations, is helping to strengthen its position as a hub for internal communications and knowledge sharing. Additionally, the use of templates for deploying a Social Intranet is clever, and a move that others should look to emulate.

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<tr>
<th>Strengths</th>
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<tr>
<td>• Focus on use cases</td>
<td>• Third-party app integration</td>
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<tr>
<td>• Ease of use</td>
<td>• Frequency of mobile app updates</td>
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<td>• Templates</td>
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<td>• Gamification Features</td>
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Saba

Saba is a Social Talent Management provider that was one of the first Talent vendors to add core collaboration capabilities to their offering (in 2006) and the very first to build a full talent management suite onto a modern social platform, starting with social learning back in 2012. Saba combines real-time collaboration, such as low-bandwidth online meetings and virtual classroom with a marketplace for external content and services, in a single unified platform, with end-to-end social capabilities that go beyond an activity stream. Saba’s social collaboration is woven into the context of talent management within Learning, Recruiting, Succession, Compensation, Workforce Planning and Performance. Saba Cloud also provides employee engagement through peer-to-peer feedback using social impressions, badges and gamification.

Vector Capital took Saba private on March 31, 2015. This move effectively ended Saba’s Financial Restatement issue. Saba has had predictive capabilities for over one year via its embedded predictive analytics, which they refer to as TIM, The Intelligent MentorTM. Saba also launched a marketplace in 2014 that enables third-party apps to be easily configured in the Saba cloud.

**Strengths**

- Social collaboration embedded in a Unified Talent management suite
- Integrated presence, online meetings and virtual classrooms and playback with remote proctoring.
- Predictive Capabilities
- Fully featured mobile apps for iOS and Android

**Challenges**

- Migrating its substantial install base to the cloud
Sitrion

Sitrion, formerly Newsgator, still gets a majority of its revenue from its legacy Newsgator business to extend SharePoint capabilities. The acquisition of Yammer by Microsoft is a major reason that Sitrion has repositioned itself as a Mobile App Approvals Provider via its Sitrion One offering.

While a large majority of their Sitrion Social (i.e. Newsgator) install base is on-premises, more clients are shifting to Office 365, which leaves Sitrion at risk of being replaced. This has caused Sitrion to focus on migrating users from on-premises SharePoint with support for on-premises and Cloud hybrid deployments.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Installed base tied to SharePoint</td>
<td>• Market awareness of Sitrion</td>
</tr>
<tr>
<td>• Integrated SAP processes</td>
<td>• Lack of Focus on core ESN capabilities</td>
</tr>
<tr>
<td>• Mobile app capabilities</td>
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</table>

Socialtext

Socialtext, based in Palo Alto, was an early ESN pioneer. Today they continue to provide the ESN capabilities enterprises need, including support for video content into its platform. With its parent company Bedford Funding, we are seeing the Socialtext platform integrated with the PeopleFluent Social HCM offering. This brings a suite of offerings spanning several business disciplines, in addition to merging social with HCM and video content management.

Socialtext has integrations and connectors to Salesforce and Microsoft SharePoint to support the line of business workflows. Given its integrations, Socialtext can allow an enterprise to focus on multiple use cases, including people-based processes, such as Talent Management and Sales. Socialtext now has a larger distribution channel and better growth opportunities.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Customizable Widgets and Start Page</td>
<td>• Support for other Content Repositories</td>
</tr>
<tr>
<td>• Video sharing and video content management</td>
<td></td>
</tr>
<tr>
<td>• Video search</td>
<td></td>
</tr>
<tr>
<td>• Social HCM offering via PeopleFluent</td>
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</tbody>
</table>
Telligent

Telligent was sold to Verint in August 2015, and the new focus is all about Communities with a particular focus on External Communities. Like other External Community providers, Telligent supports integrations into enterprise business applications, such as Salesforce.

Enterprise customers utilize Telligent for project collaboration and for creating internal employee and external customer and partner communities. Support for Exchange/Outlook enables traction in Microsoft environments. Forging synergies with tasks and project management with social and messaging can potentially enable better workflow and business process integration.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
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</thead>
<tbody>
<tr>
<td>• Focus on project and team collaboration</td>
<td>• Brand awareness</td>
</tr>
<tr>
<td>• Internal and External communities</td>
<td></td>
</tr>
<tr>
<td>• Integration with other business applications</td>
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</tbody>
</table>
## Specialists

**blueKiwi (an Atos Company)**

blueKiwi (an Atos Company), added Dominique Grelet as its new CEO in 2014. In 2015, blueKiwi launched a new module called Aoraki that features improved ergonomics and faster access to messages, as well as new updates in areas such as surveys, documents, and tasks. It continues to leverage its Predictive recommendation capabilities.

blueKiwi continues to market its Social Collaboration offering in Europe and it has updated its Mobile Apps, which now have support for Windows Phone in addition to iOS and Android. Also, blueKiwi offers a SaaS-based ESN that enables ideation, communication and Collaboration for internal and external communities.

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Challenges</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>File sharing supports links to document viewers from within activity streams</td>
<td>Market awareness</td>
</tr>
<tr>
<td>Recommendation engine</td>
<td>Growth outside of Europe</td>
</tr>
</tbody>
</table>

## Broadvision

Broadvision now offers two Collaboration offerings - Clearvale social collaboration and its new Vmoso Mobile Collaboration offering. While they are separate offerings, Vmoso is the newest product offering and we expect Vmoso to be popular.

While Clearvale provides a full set of API enabled ESN features and a simple but easy-to-use interface, we have not seen much market demand. It enables separate community networks for customers, partners and employees. We expect Broadvision to integrate the capabilities of Clearvale and Vmoso over time.

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Challenges</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Integration with other key ecosystems</td>
<td>Market awareness</td>
</tr>
<tr>
<td>Ease of use</td>
<td>Integration of Vmoso and Clearvale</td>
</tr>
</tbody>
</table>
Neudesic

Neudesic, based in Irvine, California, develops and offers its Pulse Social Collaboration Platform with direct focus on integration with lines of business applications and processes. Neudesic Pulse is a secure on-premise solution that includes newsfeeds, tagging, expertise location, search, file sharing, polling, document management and mobile, to give organizations an integrated collaboration platform, knowledge repository and expertise discovery system.

Neudesic has done well in certain industries such as Legal, where it has offered the ability to create complete directories via The Firm Directory, an internal expertise discovery system built on the Pulse platform. Other key industries served include Professional Services, Higher Education and Healthcare. With its lines of business focus, Neudesic Pulse integrates with the full line of Microsoft offerings such as SharePoint, Skype for Business and Exchange.

**Strengths**
- Integration with other key ecosystems
- Ease of use

**Challenges**
- Market awareness
- Frequency of mobile app updates
Aragon Advisory

• Carefully evaluate ESN providers both on current capabilities and on product roadmaps, particularly on Mobile and Analytics.

• Given the focus on specific use cases, enterprises should ask for references in similar industries.

• Content Integration is a core requirement. Look carefully at how content can be integrated into the ESN.

• Make sure that a community manager is part of your deployment plan.

Bottom Line

ESNs are becoming more contextual and more focused on Business Outcomes by enabling sharing of critical knowledge. Enterprises should focus on ensuring the right use cases, including but not limited to external use cases. The need to incorporate knowledge from integrating key applications such as content management repositories, email and line of business applications is what will enable people to leverage information to get to the answers they need faster.