



The Aragon Research Globe™ for Social Software, 2017: Focus on Customer Journeys

This Aragon Research Globe™ for social software evaluates 18 Enterprise Social Network (ESN) providers who are helping people share knowledge inside and outside of the enterprise. The market for ESNs is shifting to focus on Digital Work Hubs, as buyers look to consolidate the rising tide of work tools. This Globe Report provides a guide as to who is doing what in the market.

TABLE OF CONTENTS

Introduction: The Collaboration Market is Shifting.....	2
Intranets vs. ESNs.....	2
The Need for Video in ESNs.....	2
Communities Need to Prioritize Customer Journeys.....	2
The Rise of Digital Work Hubs.....	3
The Shift to Mobile Work.....	4
Collaboration Rules.....	4
Intelligent Apps Are Here.....	4
Mobile Chat as the Starting Point of Work.....	5
Machine Learning, Chatbots, and the Rise of Digital Assistants.....	5
Consolidation is a Watchword.....	5
Purpose-built Communities.....	5
Journeys Need to Focus on Outcomes.....	6
Aragon Research Globe Overview.....	7
Dimensions of Analysis.....	7
The Four Sectors of the Globe.....	8
Inclusion Criteria.....	8
Exclusions.....	9
The Aragon Research Globe™ for Social Software, 2017.....	10
Leaders.....	11
Contenders.....	18
Innovators.....	20
Specialists.....	27
Aragon Advisory.....	29
Bottom Line.....	29

Introduction: The Collaboration Market is Shifting

The Collaboration market is under pressure to evolve as mobility becomes a key use case. Social Networks, also known as Communities, have historically supported the idea of broader knowledge sharing that can be team, group, or enterprise-based and involve customers and partners. Today, however, we see ESNs becoming more purpose-built to serve internal and external audiences. General Knowledge Sharing is giving way to a more focused approach to deliver better Journeys for employees, prospects, customers, and partners. One of the big pivots in this market is the rise of Digital Work Hubs, which combine work tools with work updates (see below).

Intranets vs. ESNs (Digital Water Coolers)

While Intranets are still the primary way that enterprises communicate to their employees, ESNs provide a more social platform for communication. Social Intranets are still one of the major use cases for ESNs. Some providers have doubled down by making mobility one of the key ways to deliver timely information via their mobile apps.

For both internal and external use cases, it is less about sharing and more about journeys. In the workplace, we see the shift to integrated Digital Work Hubs quickly becoming the new priority. The imperative for automating work means that work hubs are becoming engagement centers for sharing knowledge, which has always been the long-term goal of an ESN.

The Need for Video in ESNs

While there has not been as much innovation in ESNs in the last few years, we see video as one of the new trends that will influence providers in the market. One provider, Workplace by Facebook, has doubled down on making it easy to share video. Microsoft is making waves, too, as its video platform Stream integrates with Yammer.

While the demand for video content is growing, the frequent problem is that video repositories are often separate from the ESN. When an enterprise needs to share knowledge, the software category that most closely resembles a Knowledge Network is the Enterprise Social Network. This is why we feel that more ESN providers need to fully support access to Video. Today, most ESN providers are still partnering with Enterprise Video providers such as Kaltura, KZO, Panopto, Qumu, VBrick, and uStudio, in order to support video channels. A few, however, such as the aforementioned Workplace and Microsoft, and new providers Cari and Bolste, are enhancing their own video capabilities without partnering.

Communities Need to Prioritize Customer Journeys

One of the growing use cases for ESNs is Communities. Just as the Web Content Management Market bifurcated years ago, the market for ESNs is experiencing its own split. Jive just sold its community business to Lithium, one of the leading Customer Community providers. Salesforce has also doubled down on customer communities where business process is tied to the community.

The Customer Journey is one of the top issues for enterprises today. While a Community acts as a Knowledge Network that combines content, information, and tacit knowledge (expertise that people know), one of the goals of Communities going forward needs to be improving the Customer Journey.

The Rise of Digital Work Hubs

ESN providers are starting to respond to this challenge with a larger focus on Work and what Aragon is referring to as the rise of Work Hubs. Work Hubs help individuals manage work as well as teams and groups. Work and the workplace are changing for professionals who use specialized knowledge to solve problems. These “knowledge workers” use intellectual capital to create competitive advantage and value. Three major trends are contributing to the need for enterprises to provide Digital Work Hubs for their knowledge workers:

1. Knowledge workers are increasingly mobile. They may work from home, during their commute, at a client site, or even at a coffee shop.
2. Knowledge workers require collaboration and communication tools to support mobile work. Informal sharing doesn’t work when team members are distributed and work asynchronously or when teams or external stakeholders use different applications for the same functions (chat, file sharing, video, etc.).
3. Technologies to augment human intelligence are maturing rapidly. Enterprises need to leverage these technologies—from advanced analytics to Natural Language Processing—to capture and refine corporate knowledge and to make better decisions.

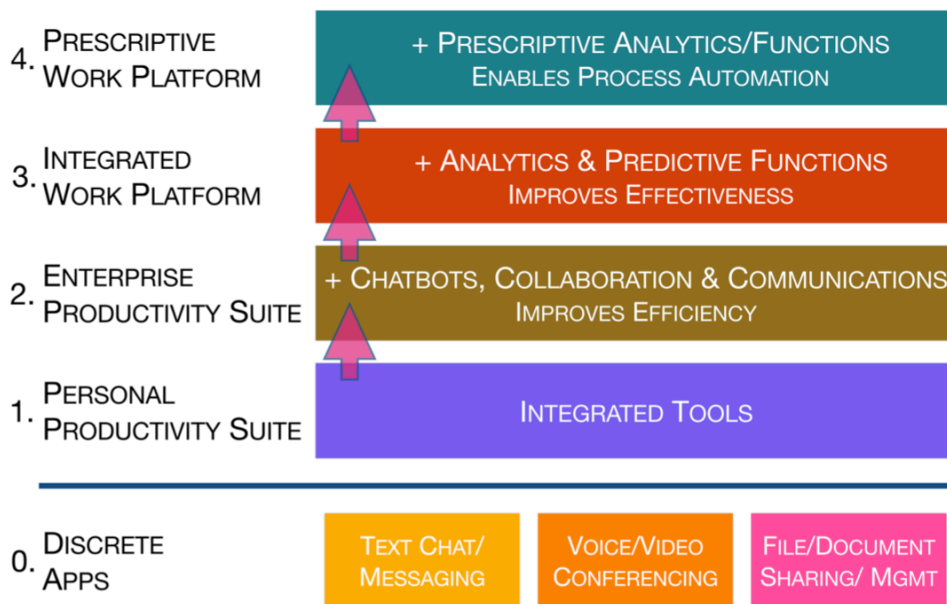


Figure 1: The evolution of Digital Work Hubs starts with best of breed capabilities and will mature to full Work Platforms.

The Shift to Mobile Work

Mobile devices, from smartphones to phablets, tablets, and laptops, are replacing the personal computer as the preferred mechanism to use application software (apps), communicate, and even serve as the primary device consumers use to make online purchases. Salesforce1 – with over 1 million downloads on Android devices alone—is a leading indicator of the popularity of mobile devices for business applications.

The reasons for the shift to mobile devices for work are two-fold. First, business applications continue to become more mobile enabled, allowing users to do more work without the need for a laptop. Second, applications are becoming voice enabled, so tasks can be accomplished via voice commands. Examples include “take these notes,” “schedule follow-up appointment,” or “route me to the next appointment.” More enterprises are offering their Communities and Work Hubs as native Mobile First offerings.

Collaboration Rules

When knowledge work was synonymous with office work, collaboration could be less formal. Information was shared in hallways and at the water cooler or coffee machine. Ambiguities could be resolved in face-to-face meetings, and decisions did not require endless email exchanges. As workers became distributed, the need for digital collaboration tools increased. Today, Mobile Collaboration is the fastest growing segment of collaboration, and the need to support it in the enterprise will continue to expand as chat-based communication channels grow in popularity.

Mobile Collaboration, of course, requires communication. As consumer messaging tools continue to grow in popularity (e.g. Apple iMessage, Facebook (WhatsApp and Messenger), Snapchat, and WeChat), increasing demand for mobile messaging in the enterprise was inevitable. The need for faster communications has led many workers to eschew email for messaging and they are not waiting for IT-approved solutions. This leads to a potential loss of corporate-managed business content and confidential information being shared on unsecured channels. ESN providers that have jumped into Mobile Collaboration include Bolste, Workplace by Facebook, IBM, Huddle, Microsoft, Carii, and Salesforce.

Intelligent Apps Are Here

The past decade has seen a tremendous uptick in research and product development in Artificial Intelligence and advanced analytics. Advances in Natural Language Processing and Machine Learning, for example, are making Chatbots, or Intelligent agents, part of a more natural and automated interface for enterprise systems, including ESNs and Work Hubs. Even emotion recognition technologies are advancing rapidly and are mature enough today to provide valuable information about employee and ecosystem participants that could be captured as business content, and used to determine next best action in a service scenario.

Mobile Chat as the Starting Point of Work

Today, it is common to text a co-worker to share knowledge and collaborate, and for the last ten years, this has often been a standalone activity. Mobile Chat capabilities are the new way that people

are collaborating, and are essential to a successful ESN. When the group chat can also appear in the activity feed, it can become associated with a work task or project.

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

Machine Learning, Chatbots, and the Rise of Digital Assistants in ESNs

While we discussed Chatbots last year, the road to conversations with software programs has been slow and it is causing the market to shift entirely. The need to get work done means providing answers faster. Machine Learning is the foundational technology that is driving the rise of Digital Assistants. One of the first examples of Digital Assistants are Chatbots, and we expect more ESN providers to add Chatbots in the next twelve months.

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

Consolidation is a Watchword

As Mobile Work comes more online, traditional ESN providers are consolidating. The consolidation started in 2012 and this year two major providers, Jive and Lithium, were sold. Jive's owners decided to sell their JiveX External Community Install base to Lithium. This move leaves Jive as an Intranet Provider only. Lithium, on the other hand, acquires some great customers and becomes one of the top Community providers based on brand alone.

Purpose-built Communities

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

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

Journeys Need to Focus on Outcomes

When deciding on an ESN and how it will be used, there are several critical questions that need to be answered. Figure 2 shows the relationship between ESNs and the focus on specific use cases and Lines of Business in an enterprise. In order to be an asset for the enterprise, an ESN/community should focus on delivering business outcomes by addressing the following questions:

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

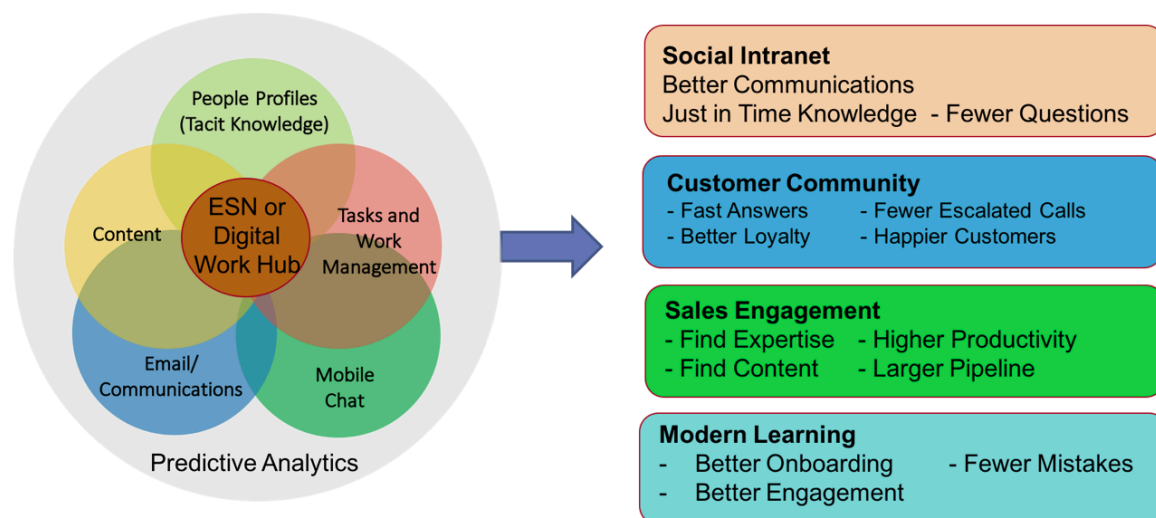


Figure 2: Customer Communities and Work Hubs need to focus on Improving Employee and Customer Journeys.

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

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

- *BlueKiwi (part of Atos/Unify)*
- *BraveNew*
- *Mzinga*
- *Saba*

New Additions

The following vendors have been added since our 2016 Globe was published:

- *Workplace by Facebook*

The Aragon Research Globe™ for Social Software, 2017

(As of October 30, 2017)

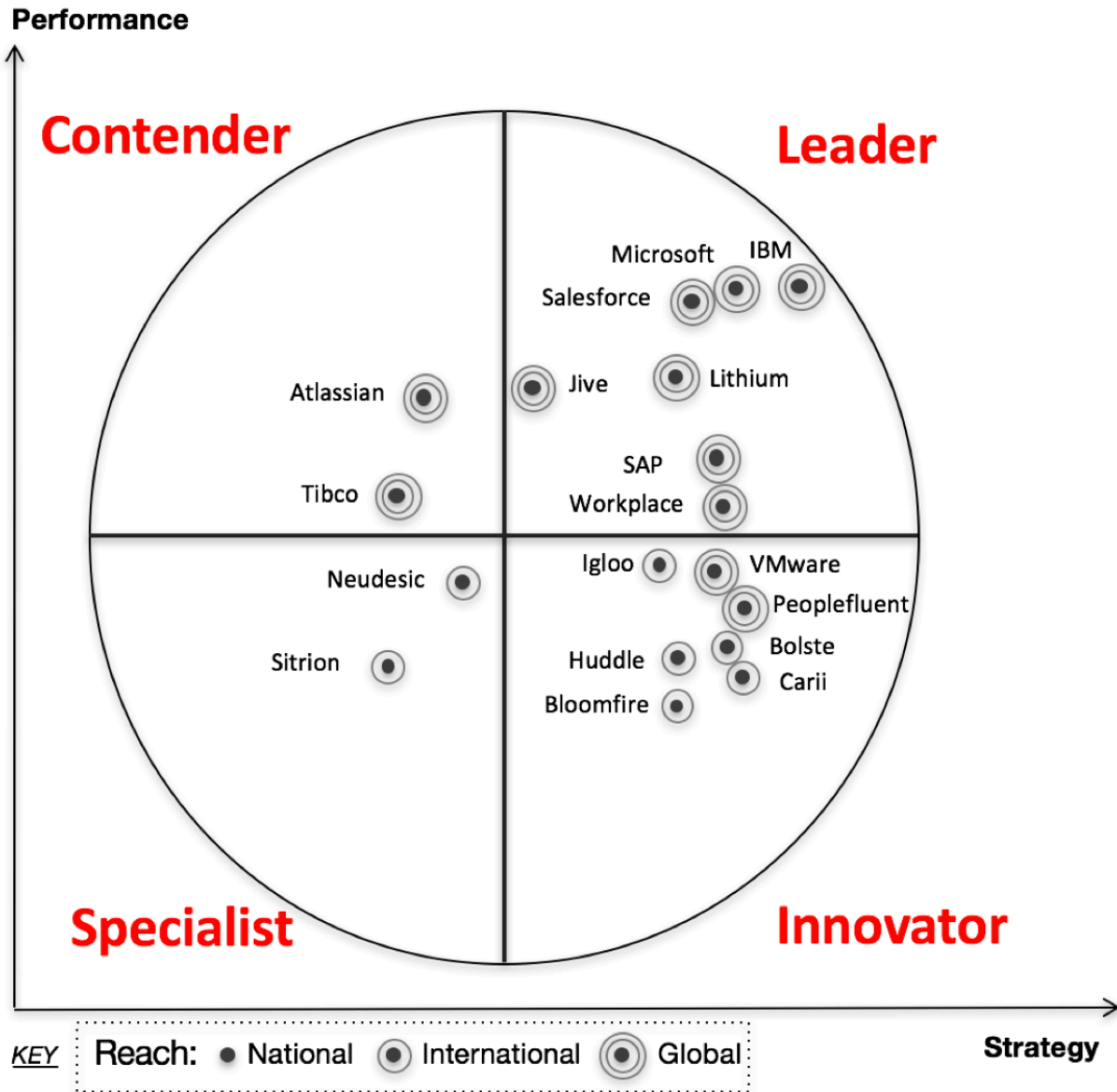


Figure 3: The Aragon Research Globe for Social Software, 2017.

Leaders

IBM

IBM has doubled down on its Collaboration Investments, bolstering Connections and beta testing its new Digital Work Hub, Watson Workspace. IBM purchased German TimeToAct Group's XCC Web Content & Custom Apps Extension Solution offering. The XCC purchase enhances IBM Connections with an out of the box offering (IBM Connections Engagement Center) that augments its Social Intranet and Employee Communications capabilities. IBM has also been working to modernize its infrastructure—including offering container-based deployment of Connections under an initiative code-named "Pink," which means that enterprises will have more flexible deployment options.

IBM has also launched its new Digital Work Hub, IBM Watson Workspace, as a new way to get work done. Watson Workspace has solid chat capabilities but it also leverages Watson to add cognitive processes into the Workplace. While Watson Workspace is still launching, it along with Connections, provides both a Work Platform and a Community offering to deal with all forms of Collaboration that enterprises need. As market consolidation continues, IBM is doubling down on its Collaboration Portfolio.

Strengths

- Global presence
- Predictive Analytics Capabilities
- Content Management
- Watson Workspace Mobile Features

Challenges

- Overlap between Connections and Workspace

Jive Software

Jive, purchased by Austin, Texas-based Aurea Software in May 2017, is now working through a quality, stability, and roadmap prioritization transition. Aurea has been in business since 2012 and is part of the large private equity firm ESW Capital. The recent decision to sell the External Community product, Jive-x, to competitor Lithium, allows Jive to focus on Internal Communities and Intranets. Jive has a solid roadmap for transitioning to the Amazon AWS Cloud, as well as a detailed product roadmap around the three themes of Corporate Communications, Collaboration, and People & Knowledge Discovery. Aurea and ESW have committed to customers that they will complete Jive's announced roadmap once they are satisfied with the product's stability and quality.

Jive's remaining offering, Jive Interactive Intranet, is expected to be combined with Aurea's other offerings in the vertical markets it serves, such as Life Sciences. It should be noted that Jive Interactive Intranet still offers one of the most robust integrations with Microsoft Office and strong search; this makes Jive a fully integrated work and knowledge hub. We expect Aurea Software to leverage Jive in its other solutions.

Strengths

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

Challenges

- No External Community Capabilities
- Committed Product Roadmap

Lithium

Lithium, based in San Francisco, is one of the major providers of Customer Communities, which is still the main offering in its portfolio of solutions for both customer service and marketing professionals. In September 2017, Lithium announced that it was buying the Jive-x Product and Customer Install base from Jive's parent company Aurea Software/ESW Holdings. This solidifies Lithium as one of the largest providers of Community Software on the market.

Lithium has a background in gaming and understands engagement science (gamification, analytics, etc.), and this is why many large enterprises count on Lithium Communities. Lithium also has a Social Media Management (SMM) product that lets users engage across multiple social media channels, which also integrates with Lithium Communities. With a suite of products that allows brands to connect with customers on both their own properties (Community) and third-party channels (SMM), Lithium is well positioned for the era of Digital Experience Management, which is all about serving individuals, not just users.

Strengths

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

Challenges

- Balancing Communities with Social Marketing focus

Microsoft

Microsoft continues to win in the market with its flagship Office 365 Suite and Yammer is one of the reasons for that. Yammer continues to be enhanced with security and features that improve the user experience. Office 365 Video and Stream content play well inline in posts, with native authentication, and Yammer also supports the import of native video files. As the video portal Stream replaces the Office 365 Video service, we expect to see more video capabilities in Yammer. Over the last year, Yammer has become a full citizen of Office 365, including Cloud residency and important out of the box integrations with OneDrive and SharePoint. One of the strong suits of Yammer is the ability to share and view content on any device, due to the Office 365 native integration and co-author documents in real time.

Besides being ideal for a corporate Intranet, Yammer remains one of the simplest ESNs for external collaboration, and doing so requires minimal System Administration overhead and support for dynamic groups in Azure Active Directory. It offers three modalities to allow flexible external collaboration, ranging from a separate network to within a group or just within a conversation. While Microsoft also offers its Mobile Messaging offering Teams, we expect that Teams will be used for Presence and escalation to voice/video conferencing functionality in Yammer—currently supported by Skype for Business—at some point. Given the bundling with Office 365, this makes Yammer a compelling value for Social Intranets and External Communities. Furthermore, upcoming integration with the Microsoft Graph promises a more innovative search and discovery experience across the Office 365 apps and services.

Strengths

- Office 365 integration – Office Documents
- Support for Video
- Ease of use
- Creating External Communities
- Security
- Large install base

Challenges

- Minor overlap with Microsoft Teams

Salesforce

Salesforce, which has been on a major growth path, has two key offerings: Chatter and Communities. Chatter is the collaboration layer for the Salesforce platform and Communities is the way to build custom communities for customers and partners. Communities is offered in all Salesforce Clouds (sales, service, etc.) and in 2017, the focus has been on enhanced options to make it easier to build a unique looking community. Chatter itself has become easier to use and more robust, with more embedded functionality such as tasks and approvals, topics, and answers.

Demand for the Salesforce Community Cloud has increased in part because of the use cases, such as partner and support communities. Salesforce has made it easier to take an action on an item—such as converting a lead to an opportunity—all on a mobile device. Salesforce continues to refine its Mobile Lightning experience and this applies to both the embedded Chatter as well as to the dedicated Communities. Salesforce has strong, outcome-focused analytics, which is a major plus. While available for custom data extractions, we expect Salesforce to make Einstein Machine Learning more front and center in future Community releases.

Strengths

- Mobile Support
- Ease of Use and Functionality
- Analytics
- Ecosystem of partners
- Partner Templates

Challenges

- Pricing for Communities

SAP

SAP Jam continues as the lead Collaboration offering for SAP. SAP Jam has enhanced its Social Learning capabilities by adding new Mentoring into the Platform via the SuccessFactors HR Platform. Integrations with SAP CRM and with SAP Hybris commerce offers a more social experience for sales users and for external buyers.

External Communities continue to be a focus area for SAP and we expect that the SAP Hybris integration is continuing to pay benefits. SAP Jam has become the defacto Community for the SAP Ecosystem and it continues to boast healthy user growth. Part of this is due to solid integration with external applications such as Microsoft Office, Sugar CRM, Alfresco, and Microsoft SharePoint.

Strengths

- Collaborative business processes with contextual data integration
- Community Integration with SAP Portfolio
- Social Learning
- Developers' ability to customize, embed, integrate and extend

Challenges

- Awareness outside of SAP accounts

Workplace by Facebook

Facebook, based in Menlo Park, and a pioneer in Consumer Social Networks, entered the Enterprise Social Networking market in 2016 with Workplace by Facebook. It has been growing its base as it extends its core capabilities to the enterprise. Two key areas of focus for Facebook are Mobile (Messenger) and Video. In Video in particular, Facebook has shifted its focus from pictures, to sharing videos, to sharing live videos. Facebook Live broadcast is becoming quite popular, in part because of viewership.

One of the benefits of using Workplace by Facebook is its ease of use. It is easy to share information in the general newsfeed or in groups and navigation is simple, too. While Facebook offers a dedicated tenant for enterprises that is separate from its consumer business, some enterprises are not convinced that it has overcome all of the security concerns.

Strengths

- Ease of Use
- Overall support for Video
- Mobile Capabilities
- Brand Awareness

Challenges

- Out of the box capabilities for sharing documents

Contenders

Atlassian

Project-based teams have traditionally used the Atlassian Confluence product for content creation and sharing. Confluence has a growing ecosystem and we do tend to find large pockets of deployments in enterprises, partially due to its growing partner marketplace. In addition, Atlassian has a new offering, Stride, a complete team communication solution that complements Confluence and replaces the older Hipchat chat product. Stride is not only a social offering, it is also a place where teams house their workflows and get work done.

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

Strengths

- Product Management Use Case
- Low cost
- Mobile capabilities
- Application Marketplace

Challenges

- Balancing overlap between Confluence and Stride

TIBCO

TIBCO, which is based in Palo Alto, offers tibbr, its Social Collaboration offering, by integrating it with TIBCO Spotfire analytics. The tibbr features includes task management, content creation, and ideation, which all work on mobile devices and PCs. Increased application integrations such as Salesforce and NetSuite evolve tibbr from a pure activity stream to a collaborative work platform.

tibbr has continued to make it easy to connect to content, and in tibbr 7, launched in 2016, it has added FedRamp certification and enhanced analytics. Finally, because tibbr supports Private Cloud deployments, it is a solid choice in regulated industries.

Strengths

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

Challenges

- Overall Market Awareness

Innovators

Bloomfire

Bloomfire, under its current COO Mark Hammer, continues to focus on knowledge sharing use cases, such as social learning, customer support, and sales enablement. In 2016, it enhanced its focus on Sales Enablement with a new edition called Bloomfire SE, which is now Lightning Ready. Given the growth of the Sales Engagement Platform market, this may be a use case for Bloomfire to focus on.

The Bloomfire product does integrate with existing repositories such as Box, Dropbox, and Microsoft OneDrive. One of the modern capabilities that Bloomfire enables is the ability to create and share multimedia and interactive content, such as HD video, with screen casting capabilities. Bloomfire should be looked at as a Digital Work Hub that can meet the needs of multiple employee centric use cases.

Strengths

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

Challenges

- Market awareness outside of U.S.

Bolste

Bolste, based in Scottsdale, is a pioneer in the emerging Digital Work Hub market. It continues to focus on offering a mobile first work experience that allows people to communicate and share knowledge while getting work done. The Mobile Messaging capabilities that Bolste offers is an extension of its core platform, and is something others should replicate. Bolste has been gaining traction in various SMBs because of its complete work hub and the fact that it combines many of the individual work and social tools needed today into one offering.

One-click video chat, screen sharing, and tasks are some of Bolste's standout capabilities. The My Bolster feature allows people to keep track of their individual tasks and work, keeping it private to the rest of the organization. Bolste combines file sharing, email, task management, video collaboration, and corporate calendars into a single interface. All of these capabilities combined make Bolste a new modern Work Platform that is poised to take on and replace existing ESN offerings.

Strengths

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

Challenges

- Market awareness

Carii

Carii, based in Media, PA, has been expanding its customer base by offering a flexible approach to branded linked internal and external communities. This enables Carii to offer private managed advertising targeted to communities, similar to what Facebook does in public communities. Carii excels at purpose-built communities of interest, where multiple levels of privacy and control are vital. This makes it ideal for law firms, services firms, non-Profits, Associations, and Fundraising. Mobile Collaboration has emerged to become a solid offering that is part of the Carii platform, allowing users to communicate quickly via mobile. Carii also incorporates content organized by topic and video content that can be shared via its integrated media server.

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

Strengths

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

Challenges

- Market awareness

Huddle

Huddle, based in London, was purchased in August 2017 for roughly \$89 Million by Private Equity firm Turn/River. Huddle was one of the early Digital Work Hubs and its collaboration is solid along with its secure content management. Huddle added Task Management in 2016 and offers strong performance on Mobile devices. With a priority for Mobile Content Management, Huddle is focusing on the intersection of content and collaboration.

Huddle offers predictive content capabilities, which it refers to as Intelligent Content—which auto syncs content that a user needs for work each day. The ability to manage projects, collaborate, and have a robust set of content management features makes Huddle a solid choice for teams on the go. This makes Huddle a provider of a Digital Work Hubs that finds content faster than other offerings.

Strengths

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

Challenges

- Awareness in the U.S.
- Organic Growth

Igloo Software

Igloo Software, based in Kitchener, Ontario, Canada, focuses on Social Intranets and Digital Work Hubs by connecting its core Digital Work platform with existing applications such as Box and Microsoft. In July 2017, Igloo announced 13 different solutions, such as Boardroom, Onboarding Center, Virtual Town Hall, and others to help business buyers get more value from Igloo faster.

On the product side, Igloo is leveraging its relationship with Microsoft to improve its geographic hosting options via Azure and workplace extensibility with deeper Microsoft Office 365 integrations. Igloo also offers pre-built integrations for Salesforce, Google for Work, File Sync and Share, Mobile Chat, IT Helpdesk, and more, which means users will be able to connect their enterprise systems and work applications to Igloo. Igloo also announced a developer program that should attract more firms to build on the Igloo platform, including the ability to build custom widgets, apps, and themes. Igloo is a solid choice for a Social Intranet and its ability to create fully branded communities and enable templates for customization is something that people who want to migrate away from older Intranet technologies will appreciate.

Strengths

- Focus on use cases / business solutions
- Ease of use
- Microsoft Office 365 Integration
- Customer support and satisfaction
- Frequent, stable releases

Challenges

- Market Awareness

PeopleFluent

PeopleFluent has incorporated Socialtext, an early ESN pioneer, into its broader suite of solutions. The offering is the foundation of what it calls its “productivity platform,” spanning all of its solutions, notably a Modern Learning Platform. Socialtext continues to make it easy to customize the look and feel of the platform including via Mobile. This commitment to Socialtext as a core part of the Productivity Platform also continues R&D investments supporting innovation and maintenance of direct Socialtext customers.

PeopleFluent’s placement of the Productivity Platform at the center of its offering comes at a time when enterprises are on the hunt for more than just an LMS. The advanced configurability of the Socialtext platform has enabled PeopleFluent to win numerous deals because of the combination of a Work Hub with on the go Learning. Socialtext also offers connectors making it easy to leverage existing content. Bundling an ESN in its deals and a focus on the Productivity Platform as a core part of its solution is paying off in the form of strong growth and adoption.

Strengths

- Video sharing, video content management, and video search
- Customizable Widgets and Start Page
- Vertical offerings for Healthcare, Financial Services, Manufacturing, and Retail
- Full integrated Social HCM offering

Challenges

- Market Awareness

VMware

Socialcast by VMware has been fully integrated into VMware's digital workspace Platform—Workspace ONE. Socialcast is used in a number of large enterprises because of its full feature set that includes Mobile Messaging, Video integration, and scalability. In particular, Mobile Messaging is fully integrated into the platform so both chats can occur on mobile devices as well as within Socialcast on a browser.

Socialcast is both a Social Network and a Digital Work Hub with a strong focus on Identity and Security. By leveraging text content and video content, all within either a browser or mobile experience, Socialcast represents a modern Social experience. This offering, which incorporates social, video services, and content, is positioned to bring context to collaborative interactions and support the emerging mobile workforce and Mobile Collaboration.

Strengths

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

Challenges

- Awareness with business buyers

Specialists

Neudesic

Neudesic is focused on the Digital Workplace as one of its key solutions use cases and offers two of its products, Pulse Social Collaboration and The Firm Directory, that address this use case. Neudesic Pulse is a solid choice as an on-premise solution that in 2017, added Task Management to its feature portfolio, which includes newsfeeds, tagging, expertise location, search, file sharing, polling, document management, and mobile, to allow users to collaborate, share knowledge, and find expertise.

Neudesic continues to have success with The Firm Directory, an internal expertise discovery system built on the Pulse platform, which has a cross industry focus but also includes a specific version designed for law firms and corporate legal departments. In 2017, The Firm Directory added new SharePoint Web Parts, new web hooks and support for connectors, and People Connectors as part of its summer release. With its lines of business focus, Neudesic Pulse integrates with the full line of Microsoft offerings such as SharePoint, Skype for Business, Exchange, and Cognitive Services.

Strengths

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

Challenges

- Market awareness

Skyvera Solutions

Skyvera Social is the new name for Sitrion Social (formerly known as Newsgator) and is under new management. ESW Capital recently acquired Sitrion's Solutions Business, including Sitrion Social, via newly formed subsidiary Skyvera Solutions, Inc.

Skyvera Social is a fully featured ESN that works with Microsoft Sharepoint OnPremise. Skyvera Social has a large install base, and will benefit from ESW Capital's Customer Success program. The program aims to achieve 100 percent Customer Success by maximizing the value customers receive and by aligning the product offerings with customers' goals to be efficient, leading-edge, and innovative.

Strengths

- Installed base tied to SharePoint
- Task Management

Challenges

- Market awareness of Sitrion

Aragon Advisory

- Carefully evaluate ESN providers both on current capabilities and on product roadmaps, particularly with a focus on the Internal or External Journey that they solve.
- Ease of Use and Integration will be key criteria for Social Community platforms.
- Enterprises need to realize that Social Communities will increasingly be tied to knowledge sharing that is focused on Journeys and outcomes—ESN providers need to respond to this.

Bottom Line

As Collaboration becomes more entwined with the business process, Social Networks are in the midst of change. The challenge is to deliver faster Business Outcomes by enabling sharing of critical knowledge. As workplace tools proliferate and the demand for simplification and productivity re-emerge, the ESN market is in a period of consolidation. Enterprises should look at the key roles and how a Social Community can improve the overall customer journey.