

IDC MarketScape: Worldwide Collaboration and Community Applications 2021 Vendor Assessment

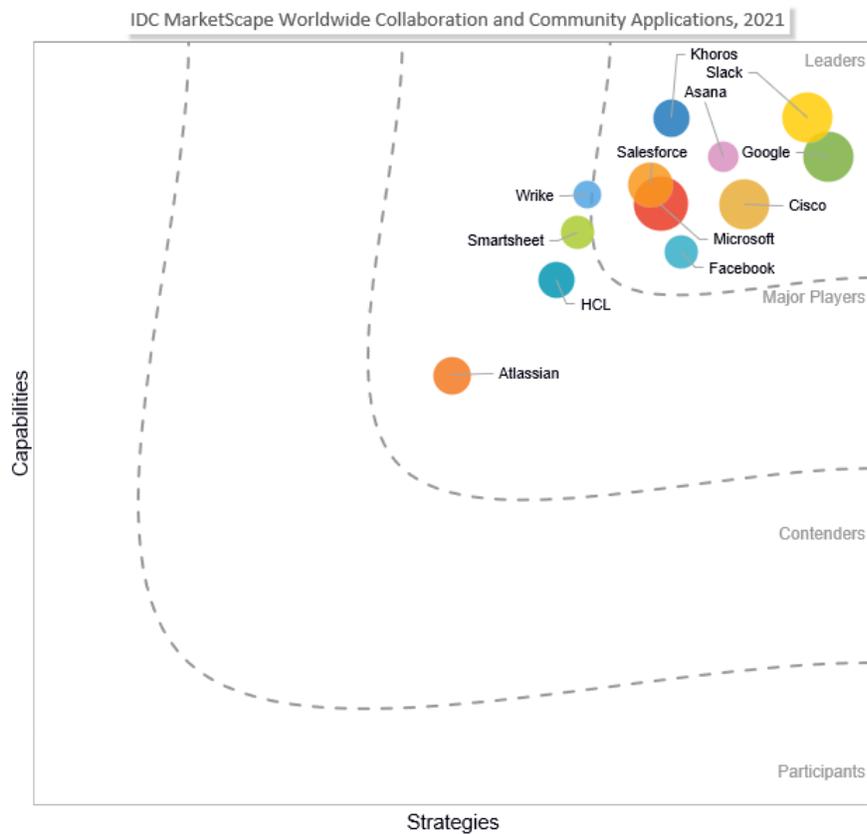
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THIS IDC MARKETSCAPE EXCERPT FEATURES FACEBOOK

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Collaboration and Community Applications 2021 Vendor Assessment



Source: IDC, 2021

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Collaboration and Community Applications 2021 Vendor Assessment (Doc # US46743820). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This study applies the IDC MarketScape methodology to evaluate major global collaborative and community platform vendors.

As the pandemic drove the increased need for collaborative technologies, three primary categories emerged: team collaborative applications, team collaborative applications with native work management, and enterprise communities – community management platforms that connect within and outside the enterprise. For this document, IDC identified leaders in the team collaborative applications and enterprise community functional markets. In detail:

- The collaborative applications market has become essential to connect a digital workforce to their colleagues and work, regardless of where they work.
- Collaborative and community products are connecting both internal workers and partners and customers.
- With an intense feature velocity, vendors are distinguishing themselves as unique, while integrating with other products to help drive seamless workflow and improved metrics.
- Enterprises of every size are centralizing work and communications on team collaborative and community platforms.
- These platforms, unlike email, keep relevant conversations with meeting assets in one place, saving considerable time while encouraging other voices to be heard, driving better results.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape looks at team collaborative applications and enterprise community application vendors. The criteria for inclusion are as follows:

- Vendors must have appeared in IDC's 2019 and 2020 market share research documents as a top 10 worldwide vendor in the collaborative applications market share, the team collaborative applications market share, or the enterprise communities (enterprise social networks) market share documents.
- Vendors must offer a proprietary product with the primary purpose of enabling or fostering collaboration and/or communities for a line of business or an enterprise.
- Vendors must have a presence in the United States and at least one other country.
- Vendors must sell to at least three global regions.
- Products in this study were reviewed as they were in general availability as of August 1, 2021.

ADVICE FOR TECHNOLOGY BUYERS

- Customers need their collaborative applications to support the APIs of the vendors they use, including CRM, HRIS, and their marketing technology stack. The business goals are more consolidated data, greater employee, partner and customer experience (CX), and machine learning (ML) to drive new and better outcome-based metrics.
- Vendors responded to the events of 2020 with massive feature velocity. This shows little sign of abating over the next few years.
- Customer support is lacking for some vendors, in part due to the explosive growth in the market. Communities of customers, where they exist, help deflect the support needs and create brand loyalty.
- Many vendors started adopting a greater role for partners to be the first line of sales and support; this is meeting with widely varied and mixed results. Several customers interviewed voiced that the partners may not be using the applications they are selling, creating a knowledge and support gap. Customers want to buy and get support online, have a community of users available to them, and want to be able to alter their offering based on emerging needs.
- Enterprises are asking for longer term, continuous road maps, and product updates. Companies that deliver annual or biannual updates have an optics challenge of being less innovative.
- Ease of online purchasing, enterprise package customization and deployment, and customer onboarding and support are challenges for many but not all vendors. Customer experience is an imperative. Simplify these areas.
- Customers voiced the needs for better APIs for many (but not all) products, as well as more help executing change management to be more collaborative.
- Customers expressed the need for real-time translation and support for multiple global regions.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Facebook

Facebook is positioned in the Leaders category in this 2021 IDC MarketScape for worldwide collaboration and community applications.

A goal of Workplace was to give a voice to everyone, regardless of where people worked or their role. Its approach is intended to connect every employee and create engaging two-way dialog and to democratize access to tools and knowledge. To achieve this, it took some of the best concepts of Facebook and turned them – with additional features – into a modern communications and collaboration enterprise platform that unifies organization communications.

Workplace launched Knowledge Library as a single place to create, store, and share static content. The company's enhanced live video capabilities include live captions, translations, automatic captioning, and caption editing and live interactive Q&A, including with guest speakers. Workplace

improved its analytics in the Insights module, including much improved video insights, and announced strategic integrations with Cisco Webex, ServiceNow, and DocuSign.

Workplace from Facebook connects leaders and employees through two-way dialog, so they can share information with people in a familiar, easy-to-use format, wherever they are. Being mobile first in design, Workplace has an ability to connect every single employee, from the CEO to the frontline worker, and everyone in between.

Workplace has been adopted and effectively used by large multinational organizations such as Walmart, Starbucks, and Nestlé.

Strengths

- Most people do not need any training to use Workplace from Facebook. That helps drive fast adoption. This is evident as the number of customers with over 100,000 users grows.
- Groups and Knowledge Library have made it easier to capture company knowledge and make it accessible for employees. This can replace existing corporate hard-to-navigate portals with an easy-to-access, device-agnostic Knowledge Library as the single source of truth. It can also replace traditional intranets with easy-to-find content and where the admin allows, engagement.
- Engaging, two-way dialogs are features that extend beyond a broadcast and provide tools to enable everyone in a business to have a voice.
- Live video is an authentic way to communicate news and information and quantify the impact of leadership communications to ensure continuous improvement.
- Now with over 7 million paid users, Workplace is being used across industry verticals with a focus on industries where organizations have a large number of frontline or deskless users.
- Extensive third-party integrations connect Workplace with the other SaaS tools used in your organization including Cisco Webex, Zoom, BlueJeans, Dropbox, DocuSign, and ServiceNow.

Challenges

- The first thoughts of Workplace from Facebook are often shaded by perceptions on its parent company.
- The consumer-simple, business-robust product still tastes a bit like the consumer product. This perception often changes when adoption starts.

Consider Facebook When

Workplace from Facebook should be a consideration when you want to build community at work, are seeking to replace intranet content with easy-to-access content, want to create content to drive feedback and engagement at granular to companywide levels, and would consider video from executives to make sure the messages can reach and engage everyone in the organization.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

Using the leaders in these markets created a very mature picture of the market. These were among the companies that "stepped up their game" to meet the emerging needs of 2020, and beyond. Even the least mature product in this grouping became mature and very stable. This created a challenge in the visual of the IDC MarketScape graph (refer back to Figure 1); however, we have clarified in the Vendor Summary Profiles section for each vendor.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Collaborative Applications

Collaborative applications enable groups of people to work together by sharing information, communications, and frequently processes. Definitions of collaborative applications markets are presented in the sections that follow.

Enterprise Community Applications

Enterprise community applications enable social collaboration capabilities to users that are either inside or outside an organization's firewall. Solution capabilities should include, but are not limited to, activity streams, blogs, wikis, microblogging, discussion forums, groups (public or private), ideas, profiles, recommendation engines (people, content, or objects), tagging, bookmarking, and online communities. An enterprise community application provides a social collaboration or relationship layer in a business that can be a discrete standalone solution and/or a set of service-oriented application programming interfaces (APIs) or integrated applications that coexist with other business and communications applications. Discrete solutions may support one type of social functionality (such as online communities, ideation, or innovation management) or a broad-based platform that encompasses many functionality traits.

Team Collaboration Applications

Team collaboration applications (TCAs) provide a workspace and an integrated set of web-based tools for an ad hoc, unstructured, asset-centric, or document-centric collaboration between groups or individuals between known domains. A TCA can be represented by secure "channels" or "rooms" that contain documents, chat history, and transaction history to maintain a persistent auditable history or a more multipurpose shared workspace where users are able to store, access, and share files. Administration is primarily performed by a known user (that governs access rules), but IT administration controls/management may also be possible. TCA solutions may also allow directory integration, policy management, and integration with social collaboration tools (content shared within the social context of newsfeeds or groups). Communication within the TCA environment is mostly asynchronous, business to business (B2B), and closed to a specific set of eyes.

LEARN MORE

Related Research

- *Worldwide Collaborative Applications Forecast, 2021-2025* (IDC #US48061821, July 2021)
- *Worldwide Collaboration Applications Market Shares, 2020: The Year of Mass Adoption* (IDC #US48061921, July 2021)
- *IDC's Annual Collaboration Survey, 2021* (IDC #US46305621, May 2021)
- *IDC Conferencing Applications and Virtual Events Survey 2021: New Expectations* (IDC #US47693821, May 2021)
- *The Rapidly Evolving Future of Collaboration and Conferencing* (IDC #DR2021_FoW_WK, March 2021)
- *Market Analysis Perspective: Worldwide Collaborative Applications, 2020* (IDC #US45918920, September 2020)

Synopsis

This IDC study represents a vendor assessment of the collaborative and community applications market through the IDC MarketScape model. Team collaborative applications and enterprise community applications became critical to connect workers, vendors, partners, and customers. Each vendor has differentiated itself with both core abilities and integration abilities that they believe will be most in demand in the future. While some companies saw customer service challenges in their growth, all are seeking better ways to improve adoption to make collaboration and communities a core part of the enterprise IT stack going forward. If user adoption of these platforms is any gauge for the future, collaborative and community platforms will be very successful. Enterprises must embrace them as a new way to communicate, form community, improve customer and worker experience and, most importantly, redesign legacy processes.

"The future of business is the connection and communities with the workforce, partners, and customers," according to Wayne Kurtzman, research director for Social, Communities, and Collaboration Applications at IDC. "Deep integrations with the rest of the technology stack improve insights, minimize context switching, and drive significantly more productivity with better worker experience. Companies that fail to provide well-designed collaboration and community platforms will force their workforce, partners, and customers to create their own solutions."

About IDC

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