Cool Vendors in Social Software and Collaboration, 2012

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Analyst(s): David Mario Smith, Andrew Walls, Nikos Drakos, Gene Phifer

Innovation is continuing in the social software and collaboration space as emerging vendors focus on developing solutions to bridge the gap between traditional collaboration, real-time capabilities, social media and business applications.

Key Findings

- Emerging vendors in social software and collaboration are developing solutions to exploit opportunities and address the gaps in established offerings.

- Offering cloud-based and freemium services allows vendors to become visible and reach customers quickly in already crowded markets.

- Social media monitoring is crucial for organizations that want to maintain accurate awareness of employee activities in online public forums.

Recommendations

- Identify the gaps in existing collaboration investments and investigate emerging social software and collaboration vendors to exploit opportunities early, or to gain an understanding and prepare for the changes in the technology and vendor landscape.

- Match new technology investments to clearly defined and measurable use cases to ensure success.

- Include social analytics as a part of enterprise social initiatives to monitor and measure the impact of social media on the business.

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Analysis

This research does not constitute an exhaustive list of vendors in any given technology area, but rather is designed to highlight interesting, new and innovative vendors, products and services. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties or merchantability or fitness for a particular purpose.

What You Need to Know

The five vendors included in this report are developing a wide range of capabilities spanning social software, social analytics, project management, and collaboration. The products are accessible in the cloud and grounded in established use cases. These vendors are innovative players in the collaboration and social software space, emerging to address specific gaps in offerings from the more established vendors. The integration of real-time collaboration and social capabilities in the context of business processes is also a growing characteristic among some of these emerging vendors.

The vendors profiled are among a broader set of interesting vendors to watch in social software and collaboration. While they have some clear differentiating value propositions, their feature sets may well end up in larger vendor offerings — through direct product innovation or the acquisition of these very same vendors. Smaller innovating vendors are usually useful in a growing market to push established vendors to refocus offerings. Understand what the current needs are and investigate these newer vendors to either fill those needs directly or to push incumbent vendors to include similar capabilities in their road maps.

harmon.ie

Milpitas, California (http://harmon.ie)

Analysis by Gene Phifer

Why Cool: harmon.ie is a collaboration tool vendor which specializes in two areas: social email and social documents. The company attempts to accelerate the adoption of collaboration without significantly changing user behavior, by introducing document sharing and social interaction in those places where people already spend their workday: email and mobile devices. Despite the best efforts of IT and outstanding tools, the collaboration tool of choice for most enterprise users is still email. Traditional email is a horribly inefficient environment for collaboration, but it is ubiquitous and

is accessed all day (and sometimes all night) by enterprise users. The devotion of users to email is leveraged by harmon.ie, by adding collaboration features to popular email clients — essentially making the email window the centerpiece for collaboration.

The company offers several products linking collaboration tools to email:

- harmon.ie for SharePoint-Outlook Edition integrates the Microsoft Outlook email client with the document sharing and collaborative features of Microsoft SharePoint.

- harmon.ie for SharePoint-Notes Edition integrates the IBM Lotus Notes email client with Microsoft SharePoint.

- harmon.ie for Google Docs integrates the Microsoft Outlook email client with Google Docs.

- harmon.ie Mobile provides access to SharePoint from iPads and smartphones.

The integration of document collaboration directly into an email client, assures that updates to documents are identified quickly, allows for collaboration in context, and assures that document exchanges between email and document repositories are handled seamlessly. Integration of social collaboration directly into an email client assures that activity streams are regularly viewed. Both allow collaboration to occur without the need to leave email to jump into a separate collaboration tool. This integration addresses one of the biggest hurdles to the adoption of collaboration tools with effortless persistence, visibility, reuse and organization from within the flow of email.

Challenges: harmon.ie is focused on the two dominant enterprise email clients (Microsoft Outlook and IBM Lotus Notes), but other email clients are in use in many enterprises and this trend will continue with the adoption of cloud-based email. Also, there are other document repositories and social networking tools in use besides Microsoft SharePoint and Google Docs. The initial focus of harmon.ie is sound, but it will be forced to expand this to capture a broader enterprise audience. The company is exhibiting efforts to expand, as illustrated by the OEM agreement with IBM announced in March 2012 — which allows integration between email and the IBM Connections social offering.

As collaboration evolves, especially social forms of collaboration, so too will the taste for collaboration tools. Therefore, harmon.ie must stay on top of new collaboration trends and be prepared to evolve its offerings as collaboration and social computing continue to evolve.

Who Should Care: Enterprise IT managers in charge of email, collaboration, mobile and social computing should take heed of harmon.ie.

MangoApps

Bellevue, Washington (www.mangoapps.com)

Analysis by David Mario Smith

Why Cool: MangoApps uniquely converges real-time collaboration capabilities — such as instant messaging, video conferencing for up to 50 participants, and group chat — with social networking

and offers integration via connector plug-ins into business, enterprise productivity and collaboration applications such as SAP, salesforce.com, Microsoft Outlook and SharePoint. People profiles, microblogging and social activity stream feeds are built in. There is support for Lightweight Directory Access Protocol (LDAP)-based directory services such as Active Directory, which will ensure that the identity of people in MangoApps profiles are the same in other enterprise applications such as Microsoft's SharePoint or Outlook.

Integrating real-time and social technologies into the context of business processes is at the heart of what is unique about MangoApps:

- It's designed to work with business process management suites (BPMS).

- It's a newer player in this emerging space characterized by offerings such as salesforce.com's Chatter, Jive, Socialcast, Yammer and Tibco tibbr.

- Unlike offerings such as Chatter and Jive, MangoApps utilizes its own real-time technology such as IM and presence in its platform.

Challenges: The major challenge that MangoSpring, the parent company of MangoApps, faces, is gaining access to enterprise customers. Alongside that, MangoSpring is not well recognized among its competitors. With a crowded landscape of social offerings it will need to know how to engage with strategic enterprise buyers who may have overlapping investments in collaboration and social tools. Integration into existing systems will be a key value add to enterprises. Another issue is that this kind of crossover product does not actually have a defined buyer with a budget, which makes it extremely difficult to engage with someone likely to buy.

With few enterprise customers to date, MangoSpring needs to penetrate that market with focused solutions-based messaging.

Who Should Care: IT, line of business leaders and those responsible for specific business processes should investigate MangoApps for its ability to offer real-time social integration and interaction in project-based use cases and processes where exceptions are common.

Podio

San Francisco, California and Copenhagen, Denmark (www.podio.com)

Analysis by Nikos Drakos

Why Cool: Podio offers a software as a service (SaaS) "work platform" — an online environment with a collection of prebuilt applications that can be arranged into workspaces for project collaboration, lead management, social intranets, event management and recruitment, for example. All applications benefit from a rich set of common capabilities that include native mobile support, profiles, activity streams, tags, reporting tools, instant search, file sharing and tasks. Podio was acquired by Citrix in April 2012 (see "Citrix Acquires Podio").

What makes Podio particularly interesting is that every application can be "cloned," or a new application created by end users with no programming experience using an "app builder." Building an app is similar to designing a form, but with a rich palette of building blocks (such as text input,

categories, dates, links, images, maps, video, questions, duration, progress, calculations, and others) and a set of interaction modes such as enabling comments or task allocation. New applications can reference data from other applications, can be arranged into "work packs," and automatically inherit the reporting, social and mobility capabilities of the platform. Live, mobile, collaborative and social applications that can be used to capture, manipulate and share structured data can be created and deployed into the Podio App Market as easily as creating a spreadsheet. There are currently 45,000 business applications in the Podio App Market — and each one can be the basis of a new one.

Challenges: Podio applications are liked by end users who use them as a more powerful, collaborative and social alternative to spreadsheets and email. Prebuilt Podio applications can satisfy important needs for capturing, manipulating and sharing structured data around hundreds of business activities, but they are relatively simple and not a real alternative to complex business applications. The ability to build or customize applications without coding also has limitations when trying to model complex processes or when implementing sophisticated logic. Arbitrary code can be used to implement complex applications via the Podio APIs, but these require the usual technical expertise.

Podio applications — at least for now — should be seen primarily as an opportunity to introduce structure, process, persistence, reuse, reporting, collaboration and visibility around information that currently gets passed around using spreadsheets and email; rather than as an alternative to sophisticated ERP or CRM business applications.

Who Should Care: IT leaders such as the CIO and CTO should understand the implications of Podio's approach to capturing and exchanging structured data in a collaborative and social environment by empowering the real experts — the users themselves — to design and refine simple applications that best support each specific activity. Business leaders should examine how Podio's offerings could better support the existing business activities they are responsible for.

Individual workers, while respecting the policies and guidelines of their employer on confidentiality and Web participation, should investigate Podio and vendors like them to understand the extent to which this kind of user-centric "work platform" can offer a more effective way to collaborate around structured information; and work with the business and IT leaders in their organizations to introduce such technology where appropriate.

Social Intelligence

Santa Barbara, California (www.socialintel.com)

Analysis by Andrew Walls

Why Cool: Social Intelligence provides research and investigation services which collect data from social media and other public websites to assemble profiles of individuals for employment screening, fraud identification and general due diligence. Analysts at Social Intelligence review the publicly available social media content and prepare reports for the client. In accordance with the U.S.'s Fair Credit Reporting Act, Social Intelligence redacts federal and state protected class

information (for example, race, religion, health) from its employment screening reports. Its process limits the legal exposure of private data concerning the individual, while supporting the decision making process of the client that initiated the inquiry. The separation between the client and Social Intelligence personnel permits employers to comply with regulations that might restrict surveillance or monitoring of the activities of subjects, while enabling decision making that incorporates analysis of that private or personal material.

Social Intelligence markets its services to four specific vertical markets within the U.S., these are: insurance claims investigations, human resource organizations that require background investigations of employees and job candidates, corporate due diligence, and government. Variations in legal restrictions of the core services and activities of Social Intelligence currently inhibit international expansion. Social Intelligence uses both a subscription model and per report models for service delivery, and requires clients to provide evidence that the subject of an inquiry has granted to the client the right to perform this form of investigation. These agreements are generally embedded in either the insurance claim or job application completed by the subject.

Challenges: Social Intelligence faces three basic challenges to growth:

- The Social Intelligence service is dependent on skilled analysts to collect, collate and analyze data in order to produce credible and reliable guidance for clients. The acquisition, development and retention of appropriate staff will be an ongoing challenge and Social Intelligence's current base of operations in Santa Barbara limits the pool of potential employees.

- Although the subscription and per-report model simplifies compliance with Social Intelligence's need for the client to provide clear evidence that the subject has granted permission for an investigation, this approach limits the potential client base to organizations that require, and are able to gain, consent with a frequent and ongoing need for investigations. This limits the market size for the service.

- Changes in the regulatory environment concerning mining of personal data posted on public social media sites might alter the operating parameters for Social Intelligence, but it is not clear if these would prove an impediment or would simply encourage greater adoption of the service by those organizations wishing to avoid regulatory obstacles by outsourcing investigations.

Who Should Care: The Social Intelligence service model is well suited to human resource groups, insurance organizations or companies with general investigative needs that require multiple and frequent background investigations into the current and past activities of specific, identified individuals that have agreed in advance to such an investigation.

SocialLogix

Roseville, California (www.sociallogix.com)

Analysis by Andrew Walls

Why Cool: Monitoring social media for postings by employees is a common capability in many social analytics and control products. SocialLogix goes beyond this basic functionality, by adding an autodiscovery capability that can detect and enumerate the social media sites being used by

employees and the user profiles that those employees use on those sites. This discovery process enables employers to efficiently identify the social media outlets that merit targeted monitoring, and which accounts on those social media sites should be monitored. By improving the targeting of monitoring efforts, end-user clients can build a more cost-effective social media monitoring program that is tailored to their actual user base.

Many organizations currently monitor only the popular or dominant social media platforms (such as Facebook, LinkedIn, Twitter) on the assumption that these sites will contain most employee activities. This assumption is often incorrect, because users adopt multiple social media platforms, including those in non-English languages. In order to provide a comprehensive view of employee activity in social media, organizations must verify which social media platforms are actually used by employees; SocialLogix fulfills this requirement. SocialLogix's discovery capability is available as a specific service, but can be used in conjunction with other SocialLogix offerings which provide monitoring, collation, analysis and reporting on social media content. All SocialLogix capabilities are delivered as cloud services.

Challenges: SocialLogix faces two basic challenges to growth:

- Variations in the regulatory environment — concerning the focused monitoring of employee actions in public social media — limit the ability of SocialLogix to expand its service internationally.

- The "cool" autodiscovery is one capability within a broader services portfolio that includes social media monitoring and sentiment analysis. These other services are not unique in the market and, on their own, do not provide SocialLogix with significant competitive advantage. Accordingly, if a major competitor added the autodiscovery feature to existing capabilities, the uniqueness and competitive advantage of SocialLogix's current offering would be diminished. SocialLogix needs to continue to innovate to maintain a technological edge in an increasingly competitive market for social media monitoring.

Who Should Care: Organizations that want to maintain accurate awareness of employee activities in online public forums need to obtain effective monitoring solutions that are also cost-efficient. SocialLogix offers an approach that supports a comprehensive and cost-effective monitoring program.

Recommended Reading

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

"Magic Quadrant for Social Software in the Workplace"

Regional Headquarters

Corporate Headquarters
56 Top Gallant Road
Stamford, CT 06902-7700
USA
+1 203 964 0096

Japan Headquarters
Gartner Japan Ltd.
Atago Green Hills MORI Tower 5F
2-5-1 Atago, Minato-ku
Tokyo 105-6205
JAPAN
+ 81 3 6430 1800

European Headquarters
Tamesis
The Glanty
Egham
Surrey, TW20 9AW
UNITED KINGDOM
+44 1784 431611

Latin America Headquarters
Gartner do Brazil
Av. das Nações Unidas, 12551
9° andar—World Trade Center
04578-903—São Paulo SP
BRAZIL
+55 11 3443 1509

Asia/Pacific Headquarters
Gartner Australasia Pty. Ltd.
Level 9, 141 Walker Street
North Sydney
New South Wales 2060
AUSTRALIA
+61 2 9459 4600