

FOR: CIOs



The Forrester Wave™: Cloud Strategies Of Online Collaboration Software Vendors, Q3 2012

by TJ Keitt, August 16, 2012

KEY TAKEAWAYS

Online Collaboration Tools Help You Remain Nimble In A Changing Business World

Businesses today depend on distributed workforces and must partner with a number of external groups to address business problems. Online collaboration tools, which sit outside the firewall and are easily delivered to both PCs and mobile devices, allow information to flow freely between those behind and those outside of the corporate firewall.

IT Leaders, While Interested In Online Collaboration, Still Question Its Feasibility

Forrester's survey of IT leaders shows that more than half plan to use online collaboration tools in the next two years. However, many questions we receive about online collaboration tools indicate IT leaders don't completely trust online services. In particular, they wonder about enterprise readiness, security, integration, and vendor commitment.

Successful Vendors Reassure IT Leaders While Providing Business Agility

As the online collaboration services market continues to evolve, the vendors that rise to the top will master the security, compliance, and IT management concerns of IT leaders. In addition, these vendors will provide IT leaders the flexibility in deployment models they need to serve the unique needs of their business and workforce.



The Forrester Wave™: Cloud Strategies Of Online Collaboration Software Vendors, Q3 2012

by [TJ Keitt](#)

with [Matthew Brown](#), [Rachel A. Dines](#), [Chenxi Wang, Ph.D.](#), [Eve Maler](#), [Chris Sherman](#), and [Andrew Smith](#)

WHY READ THIS REPORT

In Forrester's 38-criteria evaluation of the cloud strategies of online collaboration software vendors, we identified eight significant collaboration services providers — Box, Cisco Systems, Citrix Online, Google, IBM, Microsoft, salesforce.com, and Yammer — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria for constructing an online collaboration service and where they stand in relation to each other. Given the relative immaturity of this market and the nature of client questions about it, Forrester chose to evaluate the overall strategies of these providers across criteria like global footprint, service-level agreements, mobile support, enterprise readiness, and more. This report and associated Excel model highlight the key criteria CIOs and their staffs should evaluate when looking at prospective providers of online collaboration services.

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Forrester conducted services evaluations in February and March 2012 and interviewed seven vendor companies: Box, Cisco Systems, Citrix Online, IBM, Microsoft, salesforce.com, and Yammer. We included an eighth vendor, Google, which did not participate in the evaluation process. We based Google's evaluation on publicly available information.

Related Research Documents

[The Changing Cloud Agenda](#)

April 24, 2012

[Navigating The Online Collaboration Suite Landscape](#)

July 13, 2011

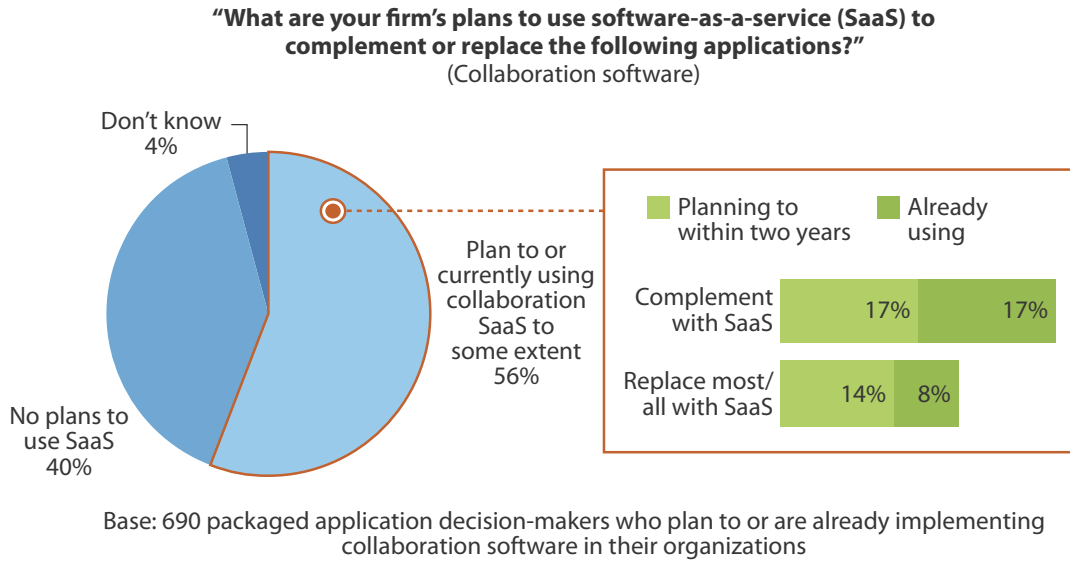


CHANGING BUSINESS DYNAMICS MAKE ONLINE COLLABORATION APPEALING

Forrester is witnessing an explosion of online collaboration services as established software vendors and upstart cloud-based services rush offerings to market. This isn't just vendors trying to one-up each other, though — there is a real and growing market demand for these tools. In our recent survey of software decision-makers at companies deploying collaboration software, more than half indicated that their organization would use software-as-a-service (SaaS) to replace or complement existing collaboration technology (see Figure 1). So why are online collaboration services so important? Business leaders say SaaS powers business transformation (see Figure 2). Specifically, collaboration SaaS offerings give business leaders:

- **Tools that make the business more agile and responsive.** As Gap and Netflix recently demonstrated, customers who are informed and empowered with easy-to-access information can force a company to quickly change strategic direction. To respond, businesses need tools that allow employees to easily share information among themselves, as well as with partners and customers. Online collaboration tools, which sit outside of the corporate firewall, provide a centralized workspace that allows all participants in a company's ecosystem — suppliers, partners, and customers — to work collectively.
- **Features and functions that evolve as the business world changes.** Business leaders and knowledge workers often tell Forrester their business' communication and collaboration technology is outdated. Traditional on-premises deployment models, which rely on three- to five-year refresh cycles, prevent updates that make collaboration easier and more efficient from reaching employees. Online services' dynamic updates solve this problem. This is why 60% of software decision-makers whose businesses use SaaS say faster delivery of new features and functions is a benefit of the technology.
- **Technology that easily supports a mobile and remote workforce.** Forrester's knowledge worker research shows that employees working outside of a corporate office is the new norm.¹ This means IT leaders must equip these employees with tools that keep them connected and that are accessible from a wide range of devices — PCs, smartphones, and tablets — enabling workers to be productive. Online collaboration service vendors serve these mobile and remote workers with browser-based tools and mobile apps — both native and HTML5 — that facilitate anywhere access.

Figure 1 Online Collaboration Tools Are Becoming A Key Part Of Enterprise Deployments

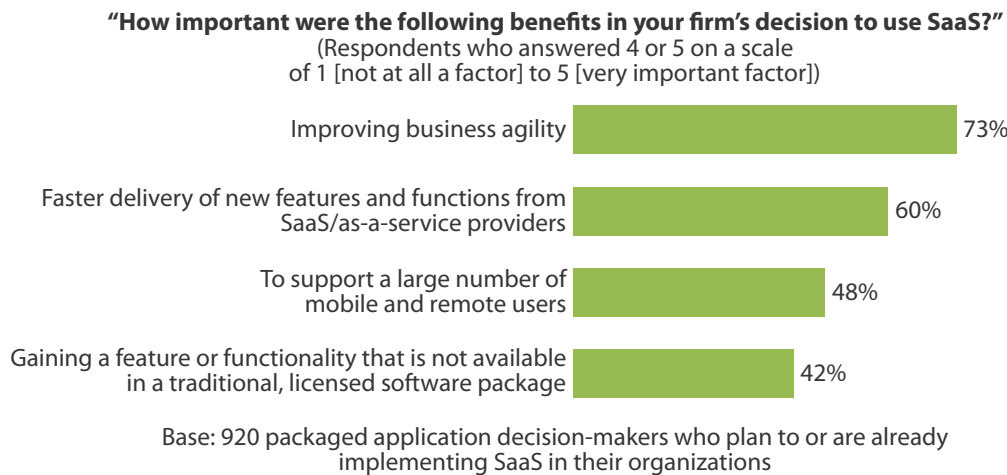


Source: Forrsights Software Survey, Q4 2011

79484

Source: Forrester Research, Inc.

Figure 2 Business Technology Leaders Report That SaaS Increases Business Agility



Source: Forrsights Software Survey, Q4 2011

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Source: Forrester Research, Inc.

Collaboration SaaS Vendors Create Nimble Suites But Raise Enterprise IT Concerns

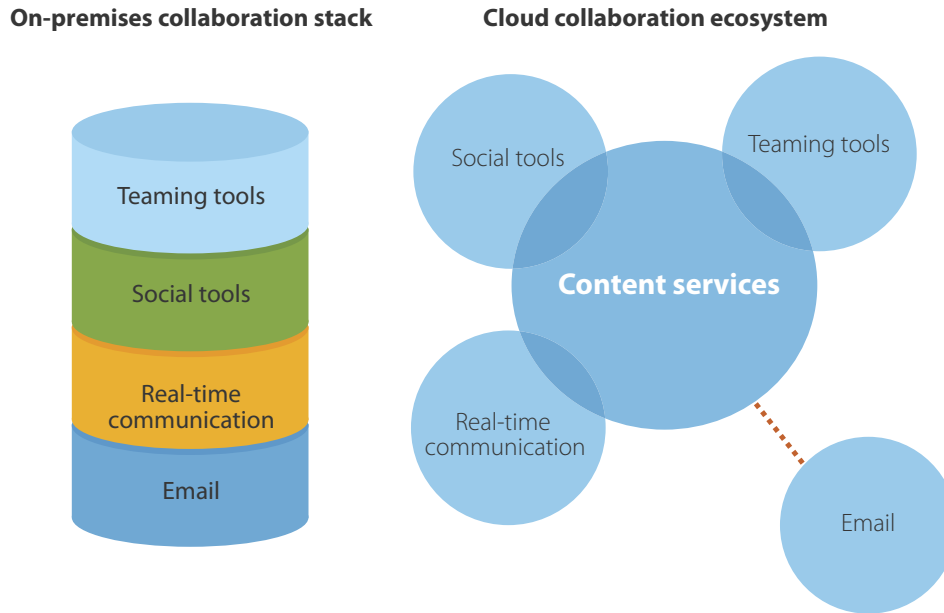
Online collaboration services vendors large and small seek to provide robust tool sets that address either a specific need or a set of scenarios.² The bulk of these vendors, however, aren't seeking to recreate the comprehensive collaboration suites — email, document workspaces, real-time technologies, and social tools — common to on-premises platforms. Instead, many seek to create an online collaboration hub — a content-storage service accessible through native or integrated real-time, teaming, and social capabilities (see Figure 3). Unsurprisingly, these offerings intrigue IT leaders while raising many concerns: Forrester has fielded well over 70 inquiries related to online collaboration services in the past year.

The questions aren't simply about which vendor has the best feature set. IT leaders are asking more fundamental questions about the viability of these services, such as:

- **Are these services enterprise-ready?** Regardless of the size of the vendor, Forrester often hears from clients that they're not sure if a given offering is "ready for prime time." These IT leaders are unsure if online service offerings have sufficient support services for enterprise clients, infrastructure to scale to large deployments, contractual terms amenable to enterprise buyers, and policies and procedures that allow an enterprise to remain compliant with applicable regulations. IT leaders also wonder if the service gives sufficient management and data recovery tools to enterprise administrators.
- **How secure are these services?** Many legal and security professionals working with IT pros are skeptical about security in the cloud. The skeptics aren't sure of the quality of the data encryption, authentication methods, and identity or access controls within online offerings. They also raise questions about the physical security of vendor data centers and how vendors address safely removing client data from retired servers.
- **Do these services integrate into my environment?** On-premises collaboration platforms are intertwined with the computing infrastructure of many enterprises, like applications and databases. So, IT leaders want to know if online collaboration services can similarly fit in: Are the services customizable, integrated with legacy applications, localized into multiple languages for a multilingual workforce, and accessible on the PCs and mobile devices workers use?
- **Are these vendors committed to online services?** Before deciding to make a service part of their collaboration strategy, many leaders want to know if the vendor or its offerings will be around over the long term. This means getting a handle on the vendor's experience and market uptake. When it comes to large, established vendors, IT leaders also want to know if the vendor is serious about its online service. They ask if the vendor is putting engineering resources behind it, building and incenting a developer and partner network, and pursuing a strategy to extend the reach and grow the customer base of the offering.

The questions IT leaders are asking reflect lingering doubts in IT departments about the feasibility of moving collaboration workloads to the cloud. These doubts aren't limited to small vendors or to vendors addressing specific collaboration scenarios — like file sharing — but cut across the entire online collaboration services market.

Figure 3 The Online Collaboration Software Model Differs From On-Premises Model



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Source: Forrester Research, Inc.

ONLINE COLLABORATION SERVICES STRATEGY EVALUATION OVERVIEW

To help the CIO's leadership team address their questions about the online collaboration services market, Forrester evaluated the strengths and weaknesses of the services strategies of prominent online vendors. This evaluation gives IT leaders an understanding of how both large and small vendors are creating enterprise-ready online solutions.

Evaluation Criteria Ask How Vendors Build Services And Make Them Useful

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 38 criteria, which we grouped into three high-level buckets:

- Current offering.** We used these criteria to examine how vendors are constructing their online collaboration offerings. This breaks down into six concepts: breadth of offering, language localization, availability and resiliency of the service, security and compliance, IT's ability to administer the offering, and how the service can (and can't) be customized.

- **Strategy.** In this section, we reviewed each vendor's plans for making its offering accessible and useful for a diverse set of businesses. We evaluated how vendors planned to put their offerings in clients' hands (e.g., pricing strategy and delivery mechanisms) and how they, in conjunction with the user community, plan to augment the tools' functionality.
- **Market presence.** To evaluate a vendor's market presence, we analyzed the vendor's customer base — its paid users seats as well as the number of corporate clients — and the size of its partner ecosystem. We also factored in the revenue the vendor's offerings generate and the length of time it's delivered online collaboration services.

Evaluated Vendors Are Veteran, Enterprise-Oriented Service Providers

Forrester included eight vendors in the assessment: Box, Cisco Systems, Citrix Online, Google, IBM, Microsoft, salesforce.com, and Yammer. Each of these vendors has (see Figure 4):

- **Established a track record for delivering online collaboration services.** In attempting to assess how the market is serving the needs of enterprise, we need to look at a group of vendors with established processes and methods. Thus, we required vendors participating in this Forrester Wave to have had a business-oriented online collaboration service for at least three years.
- **Demonstrated ability to deliver large-scale deployments.** It was also important that vendors have experience delivering services to enterprises, which Forrester defines as an organization with 1,000 or more employees. So, Forrester required that vendors have at least two enterprise-size deployments of their offerings.
- **Proven relevance to Forrester clients interested in online collaboration.** In order to maintain the Forrester Wave at a manageable number of vendors, Forrester queried our internal customer relationship management (CRM) system and solicited feedback from appropriate analysts to help determine which vendors were most highly relevant to Forrester clients.

Figure 4 Evaluated Vendors: Product Information And Selection Criteria

Company name	Product name	Date evaluated
Box	Box	February 16, 2012
Cisco	Jabber/WebEx Connect	February 29, 2012
Citrix	GoTo Meeting/GoTo Webinar/ShareFile/Podio	March 5, 2012
Google	Google Apps for Business	Q1 2012
IBM	SmartCloud for Social Business	February 21, 2012
salesforce.com	Chatter	February 13, 2012
Microsoft	Office 365	February 28, 2012
Yammer	Yammer	March 2, 2012

Vendor selection criteria

Vendor must have had a business-oriented online collaboration service for at least three years.

Vendor has at least two enterprise-size (1,000+ employees) deployments of their offerings.

Vendor is frequently mentioned or inquired about by enterprises in the context of online collaboration strategy.

Source: Forrester Research, Inc.

ONLINE COLLABORATION SERVICES ARE STILL TUNING FOR THE ENTERPRISE

In this evaluation, we set out to look across the online collaboration services market and describe the enterprise readiness of its prominent vendors. What we found was a market still in flux as vendors tweak, refine, and augment their offerings. At this early date, though, there are early leaders in cloud strategy with the rest of the market fast following (see Figure 5):

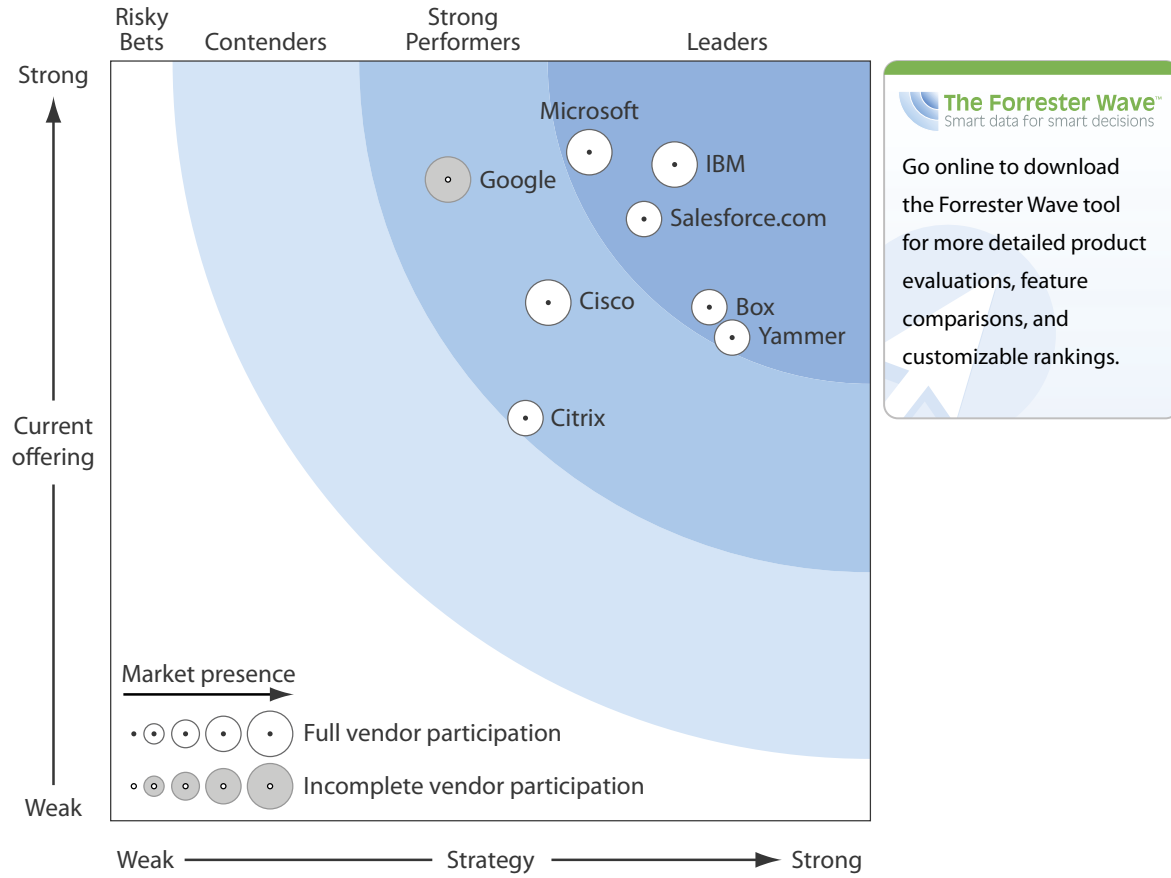
- IBM, Microsoft, and salesforce.com lead through enterprise experience.** When serving the enterprise market, understanding the intricacies of this customer base is important. So, it's not too surprising that IBM, Microsoft, and salesforce.com are successfully parlaying their prior enterprise experience into strong strategies for their online collaboration offerings. IBM and Microsoft both have long histories of delivering on-premises collaboration software as well as established track records in hosting collaboration technology. Salesforce.com is a pioneer of enterprise-grade SaaS and has constructed its collaboration offerings on top of its legacy customer relationship management (CRM) and platform-as-a-service (PaaS) infrastructure.
- Box, Yammer, and Google bring a consumer experience to enterprises.** Many online collaboration services providers found their way into the enterprise through frontline knowledge workers who used the tools to address specific problems. Box, Yammer, and to a

large extent Google rode this wave into businesses, providing easy-to-use tools that just worked. As cloud natives, these vendors want to change IT's views on deploying enterprise software. Box and Yammer (Microsoft recently acquired the latter) are willing to slowly walk clients into this new world with integrations into on-premises systems. Google's vision, on the other hand, is to leave the desktop behind for a cloud ecosystem based in the browser — a vision for which many enterprise IT leaders aren't ready.

- **Cisco Systems and Citrix Online present evolving collaboration portfolios.** Online collaboration vendors that specialized in one area see an opportunity to expand their portfolio. Cisco and Citrix Online embody this as they move from solely providing conferencing services to a more diverse collaboration portfolio. This shift in service offerings requires a change in how these vendors think about topics such as integration, customization, access controls, and encryption. Cisco is quickly moving down this path as it unifies its conferencing, instant messaging, and emerging social capabilities under the WebEx brand. Citrix Online is just beginning this journey as it works to integrate its recent collaboration technology acquisitions, ShareFile and Podio.

This evaluation of the online collaboration services market is intended to be a starting point only. We highly encourage readers to view detailed strategy evaluations and to adapt the criteria weightings to fit their individual needs using the published Forrester Wave Excel-based vendor comparison tool associated with this report.

Figure 5 Forrester Wave™: Cloud Strategies Of Online Collaboration Software Vendors, Q3 '12



Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Cloud Strategies Of Online Collaboration Software Vendors, Q3 '12 (Cont.)

	Forrester's Weighting	Box	Cisco	Citrix	IBM	Microsoft	Salesforce.com	Yammer
CURRENT OFFERING	50%	3.38	3.41	2.65	4.32	4.40	3.96	3.18
Breadth of offering	15%	2.00	3.40	3.60	4.00	4.20	3.80	2.20
Language localization	15%	2.66	3.00	2.66	5.00	5.00	4.67	4.32
Availability and resiliency	25%	3.25	3.35	2.80	3.95	4.10	3.00	1.85
Security and compliance	20%	3.60	3.33	1.80	3.68	3.71	4.70	2.94
IT administration	15%	5.00	5.00	3.00	5.00	5.00	4.00	5.00
Customization	10%	4.00	2.00	2.00	5.00	5.00	4.00	4.00
STRATEGY	50%	3.94	2.88	2.73	3.71	3.15	3.51	4.09
Pricing structure	10%	5.00	3.00	4.00	4.00	5.00	4.00	5.00
Target markets	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Developer ecosystem	15%	3.80	1.80	1.60	2.60	3.80	4.20	3.40
Platform support	30%	3.90	4.35	3.45	3.90	1.60	4.75	4.60
Release schedule	15%	5.00	2.00	3.00	3.00	2.00	2.00	5.00
Service delivery mechanisms	10%	1.00	1.00	1.00	5.00	5.00	1.00	1.00
Integration	15%	4.00	3.00	2.00	4.00	4.00	3.00	4.00
Development team	5%	5.00	3.00	4.00	4.00	4.00	4.00	5.00
MARKET PRESENCE	0%	3.10	4.45	3.05	4.90	4.50	3.73	3.33
Paid users	30%	2.00	4.00	2.00	5.00	4.00	3.00	2.00
Corporate customers	30%	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Renewal rate	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Revenue	10%	2.00	4.00	4.00	4.00	4.00	3.00	2.00
Experience	5%	3.00	5.00	5.00	5.00	3.00	3.00	3.00
Partner ecosystem	25%	2.60	4.40	1.20	5.00	5.00	3.50	3.50

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- IBM.** The recently rebranded SmartCloud for Social Business is the culmination of IBM's efforts to facilitate seamless internal and external collaboration for enterprises. IBM has developed a flexible cloud strategy to deliver these capabilities to enterprise buyers. Clients can choose between dedicated hosting or multitenant options delivered from a globally distributed data center network. A significant portion of SmartCloud's functionality is accessible through native

mobile apps across the major mobile platforms — Android, iOS, and BlackBerry — to enable a mobile workforce. And IBM has positioned its Social Business Toolkit as a means to both customize and extend its online portfolio.

- **Microsoft.** Office 365 eases enterprises into the cloud by allowing IT leaders to pick which collaboration workloads move into the cloud and which remain on-premises. To make this choice simple for prospective clients, Microsoft is investing heavily in bringing its online portfolio into parity with its legacy on-premises collaboration applications. This shows a general shift for Microsoft as it has devoted significant development resources to Office 365 and its other cloud services. Microsoft has also emphasized its dedication to meeting security and compliance standards like EU model clauses to reassure skeptical security and compliance officers that Office 365 is a trustworthy solution.
- **Salesforce.com.** At Dreamforce 2011, salesforce.com positioned its social collaboration offering, Chatter, as a key component of the “social enterprise.” Salesforce.com built the tool on its legacy CRM and PaaS infrastructure, allowing Chatter to take advantage of the security, compliance, and development capabilities for which salesforce.com is renowned. This strategy also ensures that Chatter integrates with Salesforce CRM and Force.com apps, which is especially appealing to businesses leveraging these services. Salesforce.com also brings to bear an established cloud developer ecosystem and app marketplace that enterprise buyers already trust. The San Francisco-based firm is continuously looking for ways to expand Chatter’s capabilities, as it showed in acquiring and integrating real-time capabilities from audio/video/webconferencing vendor Dimdim.
- **Box.** Based in Los Altos, Calif., this file sync and sharing service started life as a consumer-oriented service and has quickly moved to providing technology for the enterprise. To reassure enterprise buyers, Box touts the maturity of its data center operations — which include multiple geographically diverse data centers — and the sophistication of its IT administration tools. Box is also expanding its global footprint, recently opening an office in London. The startup focuses on the mobile workforce through a series of mobile apps and a robust mobile browser experience. It’s also made investments in integrations, such as its licensed connector to on-premises enterprise content management (ECM) platforms called ECM Cloud Connect.
- **Yammer.** In July 2012, Microsoft finalized a deal to acquire the San Francisco-based social collaboration technology provider for \$1.2 billion. We expect this will shore up Yammer’s data center ops, global sales organization, and security and compliance capabilities. That said, Yammer has an enterprise strategy built on integrations that support business processes. In early 2012, Yammer unveiled a licensed SAP integration to go along with its established hooks into cloud enterprise resource planning and CRM providers NetSuite and salesforce.com. A central part of the value proposition for the paid version of Yammer is its fairly sophisticated IT administration capabilities, enabling abilities like multiple domain management, strong access controls, and centralized provisioning and deprovisioning of users.

Strong Performers

- **Google.** Google Apps Premiere Edition kick-started the online collaboration suite market in 2007. While the low price point — \$50 per user per year — sparks interest, Google's appeal is to IT leaders who want a new and different collaboration services delivery model. Based in Mountain View, Calif., the search giant provides clients a complete collaboration and productivity suite in the browser. The Google Apps portfolio is fast becoming a key component of a highly integrated online business applications ecosystem, which includes vendors like salesforce.com and Workday. This resonates with IT shops that seek to move as many commodity application workloads into the cloud as possible. Google has developed strong IT administration tools and attained various certifications (e.g., FISMA and ISO 27001) to reassure wary IT leaders this vision is feasible.
- **Cisco.** Based in San Jose, Calif., this vendor's collaboration portfolio is currently shifting. Since our evaluation, Cisco has rebranded its entire online portfolio to carry the WebEx moniker and moved its social platform, Quad, into the cloud under the name WebEx Social. Through its legacy WebEx webconferencing service, Cisco established a robust global network of data centers, service delivery operations, and security capabilities. These will form the foundation for delivering its expanded portfolio, which includes WebEx Connect (instant messaging and video chat) and WebEx Social. And Cisco has shown a commitment to the mobile experience, rolling out mobile apps for WebEx Meeting Center and WebEx Connect across the major mobile platforms.
- **Citrix.** The Citrix Online Services Division (OSD) is also in a state of transition. Long known for remote access and webconferencing services through its GoTo line, OSD added file sharing through the purchase of ShareFile and teaming capabilities through its Podio acquisition. These additions signal to enterprise buyers that Citrix wants to be a part of the broader collaboration discussion. And they give OSD new ways of augmenting its offerings, such as Podio's app marketplace. This expanded collaboration suite will take advantage of OSD's robust global data center network. Now Citrix OSD is undertaking the work necessary to put in place additional enterprise-grade capabilities, like LDAP integration, that make this broader portfolio amenable to IT leadership.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 5 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

Survey Methodology

Forrester's Forrsights™ Software Survey, Q4 2011, was fielded to 2,438 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from small and medium-size business (SMB) and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during November 2011 and December 2011. LinkedIn Research Network fielded this survey online on behalf of Forrester. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business

technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

ENDNOTES

- ¹ Whether at home, on the road, or from an office, work is becoming something people do, not somewhere people go. In fact, 66% of information workers in North America and Europe already work remotely. See the June 7, 2011, "[Demystifying The Mobile Workforce](#)" report.
- ² Vendors provide tools that address different business needs. Point collaboration solutions serve a single purpose. Extensible tool sets address multiple issues. Business-process-specific tools align with specific business apps. Online information workplaces combine collaboration, productivity, and business apps for a contextual working experience. See the July 13, 2011, "[Navigating The Online Collaboration Suite Landscape](#)" report.

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« CAROL ITO, client persona representing CIOs

