

Cool Vendors in Social Software and Collaboration, 2014

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Vendors in the social software and collaboration space continue to innovate, either by creating unique value within traditional collaboration domains or by exploring new ones. IT leaders have opportunities to deliver innovative business value with these emerging technologies.

Key Findings

- Mobility (and its intersection across messaging, video and content) continues to transform how people work, share information and collaborate.
- Collaboration continues to become embedded within the context of purposeful work tools, including creative ways to coordinate and manage projects.
- Consumer use of wearable devices and mobile apps for personal fitness and health is poised to join other "bring your own" trends as part of employee engagement and wellness programs.

Recommendations

- Investigate emerging social software and collaboration technologies to exploit opportunities early, or to prepare for eventual emergence of those capabilities in large-scale vendor platforms.
- Consider emerging vendors — While emerging vendors present some degree of risk, they are worth considering when they help achieve strategic objectives related to nonroutine work activities, virtual collaboration, process and project management, and employee engagement and wellness programs.
- Match new technology investments to clearly defined and measurable use cases to ensure success; however, be prepared to consider potential breakthrough applications that might be on the cusp of a transformative trend.

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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 of merchantability or fitness for a particular purpose.

What You Need to Know

The five vendors included in this research are developing a wide range of capabilities that leverage social software and collaboration for project management, mobile messaging, employee wellness, mobile content management and virtual collaboration. These solutions represent innovative ways for organizations to satisfy business strategy needs, improve employee engagement initiatives or address gaps in existing platforms from more established vendors.

However, strategists should note that larger vendors could replicate Cool Vendor capabilities through their own research and development, existing platform enhancements, or acquisitions. IT leaders should understand their current business needs and the potential value they can derive from judicious use of emerging solutions and push incumbent vendors to include similar capabilities in their road maps.

bigtincan

Sydney, Australia (www.bigtincan.com)

Analysis by Monica Basso

Why Cool: bigtincan (BTC) provides a mobile content enablement platform for personal productivity and collaboration. Its product, bigtincan hub, aggregates content from multiple sources into a single location (hub), enabling secure access from any device. Also, personal cloud content, such as Dropbox or Google Drive content, can be integrated. A "single pane of glass" user interface, with intuitive and optimized design, provides the experience of unified access to diverse content. Security is supported through policy management and role-based permissions, content containerization, and full encryption. Document editing and annotating (in, for example, Microsoft

Office, PDF and text files) are enabled as embedded capabilities in the mobile application, as is consumption of complex content, such as animated PowerPoint files and HTML5 content. A content analytics engine enables organizations to get insight into user interaction with content, gain intelligence on the value and usage of content for each employee — and create content recommendations based on analytics data. A venture-capital-founded company launched in 2010, BTC has growing market presence in multiple regions, with customers in sectors such as healthcare, financial services, pharmaceuticals and government.

Challenges: This application aims to become the main destination for mobile content access and manipulation in the enterprise. The broad coverage — across mobile, content manipulation, social collaboration, analytics-based intelligence and security areas — makes this product innovative and unique. However, competition from a variety of neighbor markets — from enterprise file synchronization and sharing to cloud-based content creation to collaboration — is rising rapidly. A range of content or collaboration platforms now integrate a subset of those capabilities on mobile clients, such as activity streams, content aggregation and security. Also, similar offerings are available in the market, such as harmon.ie, Averail (recently acquired by MobileIron) and AgreeYa Mobility.

Who Should Care: Organizations that want to make their mobile workforces more productive and collaborative, through secure, user-friendly content access on mobile devices, should consider BTC. Through these capabilities, organizations can go beyond content collaboration and enable workflow business process support and transformation on mobile devices.

Cotap

San Francisco, California (www.cotap.com)

Analysis by Atsuro Sato

Why Cool: Innovative collaboration software can emerge through a process of breaking apart existing tasks and workflows and then recomposing and blending them in new ways, but it takes boldness to resist that pull and pursue an awesomely simple idea. Cotap, the company and the enterprise texting application, is cool because it wants to take the norms of text messaging behaviors we have already developed as consumers and transition them to the enterprise. Consider texting to be semisynchronous: It can seem like real-time communication when we are interacting as fast as we can thumb-type, but we have no expectation that nonurgent texts will get a response at any time other than when it is convenient for the recipient. Presence as a concept is blurred because, while we may always have our smartphones on us, we may not always be able to respond in the moment. There is a lower level of effort compared with instant messaging, which loses some utility when presence is not maintained and accurate.

Because Cotap has an enterprise focus, it emphasizes security and IT controls by validating accounts via an organization's email addresses. It allows IT to help with compliance and privacy by shifting business communications away from consumer services, such as WhatsApp, Line and iMessage. For the individual, Cotap gives mobile workers the ability to keep their phone numbers private or to switch devices or numbers whenever they like, without disrupting their business

communications. It is a tool designed with the business consumer in mind. It also lets conversations start in Cotap but have new participants respond via email if they have not yet self-provisioned an account.

A possible use case for Cotap is in customer-facing service industries, such as hospitality, although it might be appropriate for any environment in which field workers need quick ways of sharing information, knowledge or feedback with each other, either through one-to-one or one-to-many communication. For environments in which email is the primary communication mode but there is a need to broadcast critical or emergency notifications, Cotap gets enterprises out of the business of keeping directories of mobile phone numbers and having to blast via SMS.

Challenges: Enterprise mobile messaging has not reached high levels of popularity, and that lack of demand could impede Cotap's chances of success. At the same time, anticipation that this space will grow is attracting new entrants (such as Lua, TigerText, Biba and ChatWork) and solutions from larger vendors (such as Microsoft, which acquired GroupMe; Google; and salesforce.com). A "megavendors'" strength comes from owning not only a wider variety of software features for enterprises, but also the developers and app ecosystems writing to the relevant API set, as we see in salesforce.com. Additionally, they support the wider device lineup — from phone to PC. Even the startup player ChatWork covers the PC browser and offers a variety of features, such as voice call, videoconferencing and cloud storage. Consumer mobile messaging apps are likely to enter the space, just as Line has with its Business Connect offering. In addition, Cotap will compete with traditional instant messaging products, including Skype and Microsoft Lync, that have large market penetration and strong mobile capabilities. More complex and feature-full competitors will challenge Cotap's simpler approach, even as it tries to compensate by adding more administrative and reporting capabilities.

Who Should Care: Enterprise IT managers in charge of enterprise communication or enterprise business software, especially in small or midsize businesses and customer-facing services, should examine Cotap. The solution works in environments in which bring your own device (BYOD) is on the rise, but especially for organizations with sensitivity to collecting or sharing the personal phone numbers of mobile workers. Enterprises that are mobile-first or mobile-only may find Cotap a particularly good fit if more complex instant messaging services or unified communications solutions seem like overkill.

Jiff

Palo Alto, California (www.jiff.com)

Analysis by Mike Gotta

Why Cool: Growing use of wearable devices and mobile self-tracking apps to improve fitness, health and well-being is poised to become part of the corporate landscape as employees bring these devices into the workplace and as organizations encourage their use as part of modernized wellness programs. However, selecting what to offer employees from a fast-changing consumer marketplace that includes thousands of mobile apps and devices can be a daunting task for business and IT strategists.

Jiff is cool because its in-app store supports dozens of consumer mobile apps and devices today, and it is building an ecosystem of partners that will bring the number of supported apps and devices into the hundreds to keep pace with consumer market innovation. Jiff's platform offers employees a familiar app store experience, while delivering customized and personalized user experiences through its social and community modules and real-time reporting engine. The environment can be configured for employee participation only, or it can be set up to also include family and friends. Jiff's architecture includes an abstraction layer within its marketplace and own modules, allowing the company to deliver a unified experience to employees. The platform captures data from devices and apps used by the employee population, normalizes and aggregates the data, and provides analytics on it. This allows employees to use whatever device and apps they prefer, while still participating in companywide challenges (which could be based on steps, sleep quality, stress and mood levels, food intake, or any other standard health metric tracked on the Jiff Platform).

The design also enables Jiff to embed game theory techniques (such as challenges, leader boards and competitions) into its own social and community modules to improve participation levels and create incentives for individuals or groups to achieve goals. Companies can fully or partially subsidize items in the app store to make them more affordable. Employers can also set up a Jiff store credit for employees to spend anyway they wish. Credits can also be rewarded to employees when they achieve certain incentive goals. Programming interfaces allow developers to extend platform capabilities or connect to other data sources. Polls, surveys and reports offer insight on people's behaviors and outcomes. Jiff has partnered with Towers Watson, a global professional services firm, to test and market its solution. The platform is compliant with the Health Insurance Portability and Accountability Act.

While companies could simply standardize on a few popular products, study data indicates that people have a diverse set of fitness, health and wellness needs. If more options are made available across other lifestyle categories (such as nutrition, stress and mood), people derive greater personal value and more actively participate, thereby providing a better ROI. Additionally, workers facing more serious health conditions (such as diabetes) may require options specific to that affliction, which helps organizations manage health costs, while improving employee satisfaction. Supporting evidence includes the following:

- A recent Kantar Media's MARS OTC/DTC [Study](#) found that 55.7 million American adults used fitness and diet mobile apps in 2013, up from 43.9 million in 2012.
- A [study](#) by the National Business Group on Health found that 48% of employers plan to emphasize worker productivity and healthy living (which they hope results in reduced absenteeism) rather than on healthcare cost reduction over the next three to five years.
- A Virgin Pulse [survey](#) found that 87% of prospective employees say that health and wellness offerings play a key role when determining an employer.
- An Employee Benefit Research Institute [survey](#) profiled in Workforce magazine reported that employees are more likely to use wellness apps and devices when their private insurance health plan is consumer-driven. Within those situations, about 30% used a nutrition app, and about 25% used apps for general health information, weight management and exercise programs.

Challenges: Organizations pursuing a marketplace model with Jiff are betting that employees are better-equipped to make their own decisions regarding mobile apps and devices — and that the fast-changing consumer ecosystem will be more agile and deliver better results for wellness objectives than approaches that limit choice or are part of cumbersome benefit programs that are slow to modernize. The assumption implies that use of wearable devices and mobile apps has entered the mainstream and has carried over to the workplace. There is little data to confirm this point. Some companies and employees may be fine with a program that offers only a few popular products. Wellness programs have been challenged historically with demonstrating ROI, which may challenge Jiff and its partner Towers Watson. Jiff's partnership with Towers Watson will help provide the nontechnological insight needed to address the business aspects of the Jiff solution, but the partnership may also constrain Jiff's ability to work with other partners over time due to competitive tension. Finally, employees will likely be concerned that employers can inappropriately use data insights gained through wellness programs. Fears over privacy and surveillance need to be addressed by employers as well as vendors in this space, regardless of privacy assurances.

Who Should Care: Jiff can be of interest to: (1) IT leaders involved in BYOD or bring-your-own-app initiatives; (2) IT leaders supporting HR areas involved in employee engagement and wellness programs; (3) enterprise architects and other IT specialists involved in internal app stores, gamification strategies and user experience design; (4) other specialists involved in employee community-building efforts or tracking "quantified self" trends; and (5) business leaders involved in benefits and wellness programs and engagement strategies.

Sqwiggle

San Francisco, California (www.sqwiggle.com)

Analysis by Adam Preset

Why Cool: Sqwiggle is cool because it creates a virtual proxy for the physical workspace with near-real-time imagery of people working remotely, and it enables real-time, ad hoc virtual interactions. As workers have become more distributed, thanks to more flexible remote-work arrangements and virtual teaming, a significant social aspect of physical office collaboration has fallen away. Not only do we lose the "social bump" of crossing paths with others, but we also lose a communal environment in which we can ask quick questions to resolve blocking issues and the ability to lob a question over a wall and spontaneously harvest the collective intelligence of a group. When we are in an open-plan office or workspace with windows, our colleagues are able to see us all the time as we sit (or stand) at our desks. We might squint, reach up to scratch an ear, tilt our heads in thought, take a sip of coffee, eat lunch in front of a screen, lean forward while we're on a videoconference, or lean back while we're on the phone. We may lose self-consciousness when we are in flow. Sqwiggle helps re-create a physical co-working experience by taking advantage of our webcams, capturing a periodic image of us in natural work moments, and posting it in a shared workspace alongside similar snapshots of our colleagues. It adds an important functional enhancement: At any moment, we can single-tap one of these images and spin up a real-time audio or video chat with our colleagues, as close as you can get to the physical tap on the shoulder in virtual space.

In more common social software and unified communications applications, presence is simply a bubble indicator — red, yellow or green — that shows whether someone is available at the moment

for real-time interaction. Sqwiggle provides a more nuanced take on presence. Not only can we see if colleagues are near their desks and ready to chat, but we can also see if they have turned to talk to someone nearby and might not be available, which is a presence state we understand without needing to toggle a button in an application. When we see that they might be ready for a quick question, we can prompt them over text chat or the equivalent of a virtual intercom, and if needed, we can escalate to video and draw in other colleagues — not all that different from pulling a passing colleague into the conversation.

The ability to have a running chat forum for groups to post text, links and pictures is useful for productive collaboration. The added aspects of people images for visual presence, audio and video help recover more of the fidelity of the interactions and social fabric of office life but with the benefits of workers still being able to get things done from wherever they want. It can be your agile co-working space but also just as easily, in cases in which Sqwiggle is left logged into a meeting room, a virtual situation room or command center.

Challenges: Remote workers who are comfortable with ad hoc text chat, audioconferencing and Web conferencing over which they have more control may be reticent to adopt a software service like this in which they are "always on." Webcams are near ubiquity in the enterprise, but progress is slow in changing social norms so that webcams become instinctive tools to use. People may dismiss Sqwiggle out of reflex because it offers no option to disable the webcam, an integral part of the experience, although it will allow a "do not disturb" status. Its private mode, which still presents a picture, albeit one that is obfuscated and pixelated, is a middle ground, especially to obscure the table manners of those eating lunch at their desks. Still, the specter of potential abuse by management looms, and some may feel they are opting into software that might really be a tool for surveillance or a kind of compliance punch clock. A culture of trust already needs to exist within an organization that chooses to adopt Sqwiggle. Sqwiggle is a stand-alone user experience that has no presence integration with mainstream unified communications and collaboration suites, and the tool is currently available only via a Web browser and on the Mac platform.

Who Should Care: Any close-knit team looking for lightweight chat, audioconferencing and Web conferencing for internal purposes should consider Sqwiggle. It is also a good fit for agile and scrum development teams and DevOps environments. Distributed teams might find particular value if they believe they will see productivity gains in reducing their cycle time via quick interactions. Team managers might see it as a worthy option to simulate the "stand up" meetings they need to do daily. Finally, for product teams working through a crunch time or leadership and IT teams managing through and coordinating around a real crisis or a simulated exercise, the always-on nature of the tool can smooth some of the friction of collaboration when time is at a premium.

Wrike

Mountain View, California (www.wrike.com)

Analysis by Nikos Drakos and Katsushi Shiga

Why Cool: Generally, the key to success of social software implementations happens when the organization sets clear objectives. Project management methodology and supporting toolsets are a

class of applications that have clear aims and structures to complete tasks done by multiple workers according to a schedule. Projects are also collaborative by nature, but project management tools do not always include contextually integrated collaboration functions. Wrike achieves this by combining project management and social software capabilities into a blended user experience.

At its core, Wrike is a pure software-as-a-service, mobile-friendly collaborative project management platform. It addresses the needs of two categories of users: (1) managers who manage by defining objectives, structuring tasks, fixing deadlines, allocating resources, tracking progress, intervening to correct misalignment and so forth; and (2) information workers who need to get things done by keeping track and prioritizing their daily tasks, collecting and organizing relevant information, documenting their work and commenting on that of their peers, exchanging information, figuring out how to carry out or break down some general objective, negotiating and trading tasks, and so forth.

At the microlevel, the platform supports collaboration between individual workers with flexible to-do lists, groups, discussions, real-time co-editing, file sharing, email integration, activity streams and status notifications, as well as the possibility of including individuals from other organizations and collaborating between different accounts. At the macrolevel, for managers, the platform allows both top-down work allocation as well as bottom-up real-time roll-up views, calculating dependencies and replanning as individual tasks change. Easy-to-understand "info graphics" adapt to context and provide interactive, real-time overviews of status and activity on a project or group or across multiple projects or groups, along with options to comment or intervene, if necessary.

What is most interesting about Wrike's approach is not so much the availability of the collaborative capabilities for individual workers and teams or the project management tools for managers, but the combination of the two in a way that allows information to flow in both directions. The ability to record what needs to be done, allocate resources and track progress either top down from management or bottom up by observing actual activity, or in any combination that is most appropriate for a given activity, is a very powerful ability whose potential has yet to be fully recognized, let alone realized.

Challenges: Flexible work management, as exemplified by Wrike, is limited by the degree of visibility and access that the platform has into the way that individuals actually get things done. To the extent that daily tasks are done within Wrike or in other tools that Wrike integrates with (for example, email or file sharing), Wrike can produce roll-up aggregated management views of real-time status. But where work takes place elsewhere (for example, offline or in other applications), Wrike is as "blind" as any other conventional project or performance management tool.

Another challenge is that Wrike is not alone in recognizing the potential of this approach. Making moves into this area are Asana and Podio from Citrix (both previous Gartner Cool Vendors); other specialists (such as Appian, Taskworld, Qortex, Redbooth, Basecamp and Clarizen); and collaboration, business process management (BPM) and business application vendors. Vendors that already offer applications allowing workers to carry out less-structured work have a natural long-term advantage, making it difficult to place strategic bets today on specialists such as Wrike.

Who Should Care: Wrike can be of interest to IT leaders, project teams and IT analysts involved in BPM systems, document-centric workflow, or collaborative applications involving task coordination and logistical controls. Also, strategists looking to experiment with more social approaches to task

dynamics and self-organizing groups should consider emerging work management platforms such as Wrike to improve team communications, collaboration and business process support.

Gartner Recommended Reading

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

"Agenda Overview for Social Software and Collaboration, 2014"

"Promoting Workplace Agility With the Engagement Initiative"

"Magic Quadrant for Social Software in the Workplace"

"Hype Cycle for Social Software, 2013"

"Predicts 2014: Consumerization Impacts Enterprises' Social and Collaboration Strategies"

"MarketScope for Enterprise File Synchronization and Sharing"

More on This Topic

This is part of an in-depth collection of research. See the collection:

- Cool Vendors 2014: The Digital Age Forces Everyone to Confront 'Big Change'

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