IDC MarketScape: Worldwide Collaboration and Community Applications 2021 Vendor Assessment

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FIGURE 1

IDC MarketScape Figure 1: Worldwide Collaboration and Community Applications 2021 Vendor Assessment

Source: IDC, 2021
Please see the Appendix for detailed methodology, market definition, and scoring criteria.

**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.

**Asana**

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

Asana enables the flow of work to be better visualized and managed, with a rich collaboration layer for messaging. Asana also integrates with other popular messaging platforms such as Slack and Microsoft Teams.

**Strengths**

- In a unique use case for a graph database, The Asana Work Graph helps users facilitate work across the organization. This intelligence facilitates better visibility and aggregated insights for individuals, managers, and the enterprise.
- New data-driven functionality helps people prioritize and organize tasks intelligently and surfaces new views for workers to visualize their progress and see how their work connects to the most strategic initiatives within their organization.
- New features include video messages to the team that are transcribed as a part of the work record and can help teams explain complex concepts using plain language.
- Support is aided with a robust online community.
Recent additions include additional integrations; a new universal reporting feature supporting real-time visualizations of data across projects, portfolios, and teams; an improved user interface (UI); and a robust desktop application complimenting the web version.

**Challenges**

Not everyone considers their work to be able to be viewed as part of a workflow. This is something that Asana is well aware of, and there is reason to believe this will be addressed in the future.

Since this is a relatively new software category, people may mistake Asana for traditional project management software intended for people in project management functions. This means people will try less suitable applications and then revert to their status quo of spreadsheets and docs to manage work. These tools are cumbersome and cannot orchestrate interconnected workflows, but the market is familiar with them. Asana tries to solve this team coordination challenge with consumer-style, ease-of-use, and business-robust user interface.

**Consider Asana When**

Consider Asana when workflow visibility, collaboration, and reporting across the organization are essential. Asana has numerous templates available to jump-start users, but also offers function-focused options, such as Asana for Marketing, Asana for Sales, and Asana for Operations.

**Atlassian**

Atlassian is positioned in the Major Players category in this 2021 IDC MarketScape for worldwide collaboration and community applications.

Atlassian is best known for the agile software development platform, Jira Software. Confluence and Trello function separately as well as within the Atlassian stack. Confluence provides team workspaces, and Trello serves visual insights to the work being done using a Kanban style board, among other views.

**Strengths**

- Confluence and Trello have been given recent interface updates to make using the products more visual, easier to use, and more friendly for new users.
- When paired, new Confluence pages can be created directly from Trello cards (think Kanban style cards).
- Confluence is used as a knowledge base for some organizations.
- Trello is a collaboration tool that organizes your projects into boards. In one glance, know what's being worked on, who's working on what, and where something is in a process.
- It supports a wide variety of content formats.
- New intelligence increases automation abilities across the platform.

**Challenges**

- Atlassian often leads with Jira in the spotlight, often leaving Confluence and Trello in the shadows. Still, both have had significant recent product updates.
- Despite continued growth, some features seem slow to arrive, such as collaboration with external enterprises, which is now in early access.
- The company communicates actionable long-term road maps to the client base.
**Consider Atlassian When**

Consider Atlassian products when integration with existing Atlassian products, such as Jira, is key to the flow of collaboration.

**Cisco**

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

The Webex platform has been part of the Cisco portfolio for over a decade. In 2020, Cisco started treating the Webex business as the independent entity it should have always been. The result was over 800 new targeted features in an eight-month period and a commitment to continued investment in the platform. While best known for videoconferencing, Webex offers an enterprise messaging product with group messaging capabilities where teams can chat, coedit documents (based on integrations), collaborate with internal and external participants, schedule meetings, and access recordings and transcriptions.

Webex Customer Success Managers provide onboarding and training resources targeted at specific industry verticals and job functions. This provides onboarding and long-term adoption and learning. They also provide tools for IT admins to measure the success of adoption and engagement of meetings, messaging, and calling workloads in the Webex app.

In June 2021, new, easier-to-purchase pricing configurations bundles include calling, messaging, meetings, polling, and events.

**Strengths**

- Strong security "built in" story with zero trust security and real-time data loss prevention
- Integrations with other applications such as Slack and Microsoft Teams, while creating Spaces within Webex for teams to meet
- Internal and external collaboration abilities
- Partnering with clients to improve the culture of collaboration and resolve adoption challenges
- Acquisitions covering AI, automation, and engagement already adding to the solution

**Challenges**

- Metrics are rich but focus on adoption rather than outcomes.
- Cisco has had good name recognition with the C-suite for a long time. Now that purchasing occurs through multiple line-of-business leaders and staff, and a reintroduction is in order. Cisco has started an awareness ad campaign to start to rectify this.
- Webex has refreshed the product and messaging several times in the past two years. Still, the core product has been consistent and reliable.

**Consider Cisco When**

Consider Cisco Webex as a solution when you may be using or considering additional Cisco products in the workplace. Security and interoperability with hardware and software is a plus.

**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.
Google

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

Google is well known for enabling collaboration with docs, sheets, and slides. Over time, Google added communications, collaboration, and more productivity applications, integrated to where people were already working. Google brought the combination of rich features tighter together, including a much-improved Google Meet communications platform, and in 2020, rebranded the more integrated experience as Google Workspace. Its mission was to expand the solution's capabilities to provide collaboration equity for all workers.

Useful intelligent features are on full display, supporting a wider array of use cases (real-time translation, closed captioning, and translations) and work styles.

Google Workspace is marketed to organizations of all sizes, from the enterprise to the solopreneur, and the solution has customers of all sizes around the world, across virtually every industry. As of the writing of this document, Google reports over 3 billion users have access to Google Workspace. 170 million students and educators are using Google Workspace for education worldwide.

Google Cloud Platform (GCP) underpins many of the key features. GCP operates in 27 regions and 82 zones in 200+ countries and territories.

**Strengths**

- Familiarity with Google Workspace applications is nearly universal.
- The pandemic created a sharp increase in Google paid users. The product has strong governance, compliance, and security features and was easy to buy online and deploy at the enterprise level. These features became more prominent during 2020.
- New security features included enhanced admin controls and Google Workspace client-side encryption. Enhanced DLP, phishing, and malware protections were also recently deployed.
- Collaboration is now central to documents and other assets, reducing any company cultural challenges to collaboration.
- It has a strong ability to utilize APIs.
- Major design and functionality improvements across Workspace and the education platforms helped drive wide adoption. A better and unified video experience continues to improve adoption. This was bolstered by being easy to purchase and deploy for IT.
- AppSheet empowers line of business and IT teams alike to create no-code automation and applications. The ability to integrate chatbots into Google Chat to improve user experience (UX) further demonstrates the options available.
- Google touts itself as "the cleanest cloud in the industry" using less energy and zero net emissions and plans to be carbon free by 2030.

**Challenges**

Google has strong familiarity among customers and enterprises, including adoption with large global brands. While there is often resistance to "new ways of working," familiarity from the education and consumer spaces helps offset this in the business space. This can be further offset through training (change management) and internal mentors, many who literally grew up in what is now Google Workspace.
While some initial concerns about the UI changes were raised during the transition to Google Workspace, the more integrated experience received very favorable customer reviews. Google has recognized that IT leaders have asked for more advanced notifications of major UI changes.

**Consider Google When**

Consider Google when strong integration of content, communications, and collaboration is necessary. Also consider Google because of its ease of use and seamless experience on mobile.

Because of Google Workspace's adoption in the education market (with 170 million students and educators), companies may find it necessary to consider the platform in the future.

**HCL**

HCL is positioned in the Major Players category in this 2021 IDC MarketScape for worldwide collaboration and community applications.

HCL purchased the IBM collaboration portfolio in 2019 and has since built up a significant following with HCL Connections collaboration platform and Sametime Meetings. HCL has been focused and successful at creating the new HCL brand for new and existing customers.

**Strengths**

- HCL Connections and Sametime enable a digital workspace for individuals, colocated or virtual teams, to collaborate. The workspace is customizable for a tailored experience. Its community framework brings together the capabilities for finding and connecting with experts, accelerating sharing information, discovering and organizing content, and delivering agile project management to reach milestones faster.
- The Connections Engagement Center provides two-way collaboration from an intranet landing page that aggregates and personalizes content from Connections and elsewhere.
- HCL supports on-premises, managed service provider (SP) hosted cloud or self/provider-managed Kubernetes.
- HCL enables a wide array of connection APIs to extend the functionality of Connections and provide an integrated experience for users. This includes out-of-the-box integration to the Microsoft ecosystem.
- HCL operates in over 50 countries, and the collaboration products, HCL Connections Engagement Suite and Sametime Premium, have customers in 108 countries. HCL itself is not new to the market.

**Challenges**

HCL’s growth is challenged by brand name recognition but is somewhat offset with a loyal customer base.

**Consider HCL When**

Consider HCL when a robust, integrated collaboration platform is needed for a managed or on-premises collaboration solution that can be integrated with the Microsoft ecosystem.

**Khoros**

Khoros is positioned in the Leaders category in this 2021 IDC MarketScape for worldwide collaboration and community applications.
The result of the Lithium Technologies (communities and social customer service) and Spredfast (social media management) merger, Khoros, continues to add features to its community and digital customer engagement platform. Khoros has active community product deployments in 27 countries and supporting over 40 languages. They also support some of the largest communities by some of the world's largest brands.

Since the merger, in addition to engagement on the standard social channels (such as Facebook and Twitter), the API-friendly platform launched support for the integration of Apple Business Chat, Google's Business Messages, WhatsApp, web chat, and email — as a partial list. Also launched was Khoros Bot and new AI features such as Suggested Responses, Community Events, and Community Group Hubs to scale engagement and customer service.

Recent acquisitions of machine learning and conversational AI company Flow.AI and CX insights company Topbox will result in a new generation of features for Khoros.

**Strengths**

- Khoros provides a wholistic look at social business and customer experience. Khoros is known for hosting communities' social channel and chatbot engagements as well. The company's single, consolidated dashboard approach is unique in the market. Dashboards are available for a multitude of levels, including community manager.
- Khoros has sophisticated gamification with separate badging and rank systems to allow for different incentives and engagement patterns for visitors, new members, experts, and super users across 100+ different trigger events.
- The company has content syndication tools for taking community into any digital space with low-code or no-code widget and flexibility to embed based on a variety of content characteristics.
- Engagement workflows, automation, and bots enable better scaling of community engagement.
- Khoros Atlas, its support community, is a well-moderated, highly active, and robust community of users. Khoros collaborates with the user base, modeling best practices.
- Khoros can and should be as much for marketing solutions as for customer support.
- Rich APIs enable Khoros to support a variety of use cases, especially when enhanced with ML/AI.

**Challenges**

- Most companies do not yet understand that if a well-moderated community is not staffed and promoted by the company, B2B and B2C customers will create one, where the company has no reach nor insights.
- A significant market challenge has been the expanding definition of what it means to build an online community. As the major social networks invest in more engaging ways to connect people, the definition of what it means to be an online community is evolving. Virtual events, branded communities, messaging, and collaboration — the market is becoming broader and more competitive. Still, it centers on connecting people in a relevant community.

**Consider Khoros When**

Consider Khoros when digital relationships are important to your company's customer experiences and you would prefer a unified social dashboard to manage these experiences.
Microsoft

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

The release of Microsoft Teams could not have been better timed — a collaboration platform with native integration to Microsoft 365 for collaboration, authoring, workflow, portals, governance, and compliance. Microsoft Teams is described as the place to meet, chat, call, collaborate, and automate work.

Microsoft looks at collaboration in this hierarchy: Microsoft Teams and Microsoft Office are the user experience interfaces that people engage with. The Fluid Framework and Adaptive Cards are design components that make it easier to integrate with the rest of the stack. Azure PaaS is the logic level, and data comes from the Microsoft Graph and Microsoft Dataverse. The data layer will increase in visibility as the product matures to create more significant enterprise metrics.

Microsoft Viva, using the Microsoft Graph, provides intelligent employee experiences that support improved work. Viva takes signals from actions made within Teams and across the Microsoft platform to provide insights to employees, managers, and enterprises.

Strengths

- The widespread adoption of Microsoft Teams (155 million daily active users as of May 2021), and its integration to Microsoft 365
- Brand recognition
- Easy to chat, create groups, and share content
- Strong history of security, governance, and compliance
- Microsoft attracting developers to integrate their products within Teams
- Microsoft focusing on managing 3D objects, anchored in space to its developers (Microsoft is a significant vendor in the augmented reality space, including hardware. This could be expanded to include collaboration features.)
- Yammer a strong complement to Microsoft Teams as a community platform (Yammer, like all communities, work best when there is dedicated leadership. The integration of Yammer within Teams makes the platform more visible to users.)

Challenges

- SharePoint is highly active in supporting Microsoft Teams. Based on legacy customer implementations of SharePoint, especially on-premises versions, some users have a negative perception of the SharePoint platform. Microsoft has addressed many of these perceived shortcomings in the online version of SharePoint. It has been redesigned to be compelling, flexible, mobile, and easier to use.
- Microsoft is aware that its licensing model can be confusing given the breadth of the product offering. As Microsoft continues to add new services and platforms, it will be an imperative to simplify pricing.
- Microsoft is yet to have a robust mechanism to enable intercompany collaboration that others in the market have had for some time.
- Microsoft can incorporate other applications APIs more elegantly and effectively within Microsoft Teams for a more fluid user experience.
The current user interface issues, according to users, hamper their effectiveness, whether it is trying to open multiple documents within the Teams Environment or answering chats while in a document or meeting.

**Consider Microsoft When**

Consider Microsoft when Microsoft 365 integration is of importance. Microsoft brings strong security, governance, and compliance and supports multiple geography deployments with integrated experiences across chat, video, and supported applications.

**Salesforce**

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

Earlier this year, Salesforce Community Cloud was rebranded as part of Salesforce Experience Cloud. This looks to increase the value that Salesforce is putting on communities, making it part of the customer experience, partner experience, and employee experience solution.

At the writing of this document, Slack has agreed to terms to be acquired by Salesforce. This is expected to make Slack the de facto collaboration platform and part of the UI of the Salesforce ecosystem, while remaining available for sale under the Slack name.

**Strengths**

- There are a considerable number of abilities in this product. It enables peer engagements as well as moderated engagements in a Salesforce ecosystem that enable the touch points to be realized and well utilized.
- Content could be for ecommerce, ideation, support, or end users and partners sharing best practices. This can be viewed as a portal, forum, or support site, or even a department area, like HR.
- Strong community personalization features drive a positive customer experience.
- The platform can manage multiple community types, such as partner, customer, and internal communities.
- The Trailhead community provides good instructional videos coupled with community support.

**Challenges**

- The license types can be complicated to predict in an active community launch.
- Some of the rigidities of the Salesforce ecosystem carry over to the community platform.

**Consider Salesforce When**

Existing Salesforce customers will find significant value from Experience Cloud, which now contains the communities functionality.

**Slack**

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

When the pandemic hit, Slack was one of the few solutions that was already well known and ready for the increase in usage.
The vision of Slack is to help businesses unlock speed and transparency by building a real-time, event-driven organization. At its peak in 2020, the popular channel-based messaging platform reached up to 65 million messages per second.

Slack is known for easily connecting teams of internal workers, even between companies. The introduction of Slack Connect enables a secure method for organizations to connect, communicate, and build workflows together. Being easy to purchase and deploy during 2020 helped fuel the company's growth.

Among the recent feature releases include Slack Huddles, an audio-only feature for channels to foster spontaneous and more asynchronous collaboration, Async meeting video tools, Scheduled Send of messages, and Atlas internal company-rich profile and directory insights. A series of security-centric features were recently added to the platform, including malware and link scanning and application installs and unfurls with secure verification.

Slack reports more than 91,000 paid customers with 950,000+ connected endpoints on Slack Connect. That is up 265% year over year.

In July 2021, Salesforce closed the $27.7 billion acquisition of Slack. This is expected to make Slack the de facto collaboration platform and part of the UI of the Salesforce ecosystem, while remaining available for sale under the Slack name.

**Strengths**

- Slack was widely adopted by the developer community and has since become "average person friendly." It is often used both inside and outside of enterprises as a fast, reliable channel-based messaging platform.
- Slack integrates with a large number of business software applications, including Microsoft 365, Google Workspace, and Salesforce to reduce the need for context switching. This moves work closer to "a single pane of glass" workspace as its integration enables people to stay in the applications they need most for work.
- Slack has a robust developer community with 975,000 daily active registered developers as of April 2021.
- The codeless ability for users to create their own templates, reusable building blocks, and workflows frees up developers for more complex, high-value work.
- New audio and video features replace typing with quick Huddles (audio chat) or just recording short videos to share content/status – both of which result in a transcript for the channel.
- Slack offers in-house customer relationship support and management, owning the customer experience throughout an organization’s journey, without outsourcing it to external partners.
- While the Slack freemium version has found wide adoption, enterprises prefer one of three paid-for plans (Pro, Business+, or Enterprise Grid) to meet security, compliance, and governance requirements.

**Challenges**

- Slack, despite being the category creator, has an inaccurate perception challenge.
- Slack produces significantly greater enterprise value with integrated enterprise applications. While not a challenge, getting enterprises to integrate software can be a challenge for enterprises less savvy in collaboration.
Reinventing how work gets done requires companies to embrace new ways of communicating at every level of a company. This requires both the technology and a culture of collaboration for Slack or any other solution.

**Consider Slack When**

Consider Slack when enterprise channel-based messaging is a must, internally or between companies, or both. Slack should also be considered where integrated third-party applications are often used.

**Smartsheet**

Smartsheet is positioned in the Major Players category in this 2021 IDC MarketScape for worldwide collaboration and community applications.

Smartsheet is a unique, multisolution platform that facilitates dynamic work. It helps coordinate, execute, and automate work.

The platform empowers users with a broad set of no-code tools that offer the scalability, flexibility, and security required to configure almost any process without costly development. Smartsheet is designed to connect the systems of record with the platforms of communications as a dynamic work platform. The results can be displayed in Smartsheet-created WorkApps, dashboards, portals, reports, and sheets.

Smartsheet's collaborative layer enables conversations within the work, as does its optional integrations with Microsoft Teams, Slack, and other solutions.

**Strengths**

- Smartsheet is a dynamic work platform that integrates a wide variety of applications supporting virtually every line-of-business applications (e.g., sales, collaboration, analytics, content, IT, productivity suites, and finance).
- It has robust conversational layer to enhance collaboration, even if integrated with other solutions.
- Smartsheet benefits through a refreshed user interface and its acquisition of Brandfolder. The latter of which enables Smartsheet to have content collaboration capabilities, including digital asset management features. This includes supporting rich graphic proofing and approvals among multiple document formats.
- Smartsheet's custom data integration tool in coordination with the automation engine enables organizations to connect disparate external systems of record with Smartsheet to eliminate manual and repetitive tasks within end-to-end workflows.
- Smartsheet's solution center offers prebuilt templates and template sets for thousands of use cases. Once template solutions are configured, they are easily deployed as no-code desktop and mobile applications.
- These apps pull together internal projects, reports, dashboards, and external content into a role-permissioned application. Apps can be deployed to the entire enterprise while simultaneously providing personalized views based on an individual's permissions.

**Challenges**

- Smartsheet is so multifunctional, it becomes hard to describe when compared with other solutions.
For Smartsheet to truly be adopted may challenge the status quo in many companies. Companies need to focus on people doing the work, not just on the larger (more expensive) systems, which Smartsheet can connect.

**Consider Smartsheet When**

Consider Smartsheet when you need a flexible, scalable collaboration solution that leverages integrations of multiple systems and enables custom management, automations, workflows and outputs to dashboards, portals, and elsewhere.

**Wrike**

Wrike is positioned in the Major Players category in this 2021 IDC MarketScape for worldwide collaboration and community applications.

Wrike is a collaborative platform supporting project management including assignment of resources, workflows, and the ability to use those assets to collaborate in real time. Personalized views featuring nine different work views support different working styles while providing real-time visibility into product status, resources management, and team performance.

The collaboration in Wrike occurs within the task or project and easily supports cocreation, editing, approvals, comments, @mentions, and so forth. It features as a collaborative document asset management platform. It supports proofing using some 30 formats across popular asset types (video, image, web, mobile, Google docs, Office, and PDF) with side-by-side and overlay comparison, real-time embedded commenting, and responses.

Wrike was acquired in March 2021 by Citrix.

**Strengths**

- Wrike has taken a page from content management and added an integrated layer of collaboration, in addition to its workflow abilities.
- It helps visualize changes and allows inline comments, proofing, and approvals.
- Workflows and processes can be automated with the help of customized templates. Automation can occur within Wrike, but can also utilize the over 400 software application integrations with the addition of the Wrike Integrate product.
- Custom Dashboards allow flexibility in creating specific use case project-centric dashboards.
- It offers use case-specific vertical solution packages, such as Wrike for Marketers and Wrike for PMO.

**Challenges**

- Not everyone views their work in a workflow or project. Dependencies can create challenges in some environments.
- While Collaborative Work Management is a well-established category, some confusion between categories such as Project Management, Enterprise Collaboration, Task Management, and Team Messaging does exist. Wrike seeks to normalize this confusion in the product.
- Driving Change Management is critical to the overall success of implementations. Wrike has developed differentiating strategies and playbooks to help facilitate the process of being collaborative.
Failure to integrate Wrike with other software, as with many collaborative products, will prevent the company from working to its full ability.

**Consider Wrike When**

Consider Wrike when the blend of project management, workflow, and even creative work needs a layer of collaboration to keep them together.

**Other Companies of Note**

Some companies have a collaborative layer of features but did not meet the criteria set forth in this IDC MarketScape document. Companies, as a partial list, include:

- Dropbox
- Box
- Zoom
- Miro
- Mural

**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 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.

Strategies and Capabilities Criteria

Tables 1 and 2 provide key strategy and capability measures, respectively, for the success of team collaborative applications and enterprise community application vendors in this document.
### TABLE 1

**Key Strategy Measures for Success: Worldwide Collaboration and Community Applications**

<table>
<thead>
<tr>
<th>Criteria categories</th>
<th>Definition</th>
<th>Weight (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functionality or offering strategy</td>
<td>Strategy to match evolving business needs</td>
<td>15.00</td>
</tr>
<tr>
<td>Customer delivery and road map</td>
<td>Ability to meet evolving enterprise demands</td>
<td>15.00</td>
</tr>
<tr>
<td>Support strategy</td>
<td>Customer's perception of vendor's customer and community support</td>
<td>10.00</td>
</tr>
<tr>
<td>Architecture/platform strategy</td>
<td>Platform architecture strategy</td>
<td>15.00</td>
</tr>
<tr>
<td>R&amp;D pace/productivity</td>
<td>R&amp;D planning</td>
<td>15.00</td>
</tr>
<tr>
<td>Security</td>
<td>Security, governance, and compliance strategy</td>
<td>15.00</td>
</tr>
<tr>
<td>Ease of adoption</td>
<td>Pace of internal adoption to be functional</td>
<td>10.00</td>
</tr>
<tr>
<td>Growth: Purchase experience</td>
<td>Purchase experience as compared with other products</td>
<td>5.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>100.00</strong></td>
</tr>
</tbody>
</table>

Source: IDC, 2021
TABLE 2
Key Capability Measures for Success: Worldwide Collaboration and Community Applications

<table>
<thead>
<tr>
<th>Criteria categories</th>
<th>Definition</th>
<th>Weight (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functionality or offering</td>
<td>Essential capabilities</td>
<td>15.00</td>
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<tr>
<td>Business results metrics</td>
<td>Metrics to measure business results</td>
<td>15.00</td>
</tr>
<tr>
<td>Advanced functionality</td>
<td>Product-specific features</td>
<td>5.00</td>
</tr>
<tr>
<td>Architecture</td>
<td>Offering built as API focused</td>
<td>10.00</td>
</tr>
<tr>
<td>Range of services: Ecosystem</td>
<td>Developers and partnerships</td>
<td>15.00</td>
</tr>
<tr>
<td>Customer service delivery</td>
<td>Customer product and service satisfaction</td>
<td>15.00</td>
</tr>
<tr>
<td>Security, governance, and compliance</td>
<td>Security, governance, and compliance of offering</td>
<td>15.00</td>
</tr>
<tr>
<td>Portfolio benefits</td>
<td>Portfolio of offerings</td>
<td>10.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>100.00</td>
</tr>
</tbody>
</table>

Source: IDC, 2021

LEARN MORE

Related Research

- The Rapidly Evolving Future of Collaboration and Conferencing (IDC #DR2021_FoW_WK, March 2021)
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."
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