

For: CIOs

The Forrester Wave™: Enterprise Social Platforms, Q2 2014

by Rob Koplowitz, June 5, 2014

KEY TAKEAWAYS

IBM, Microsoft, And Salesforce.com Are Forrester Wave Leaders And In A Position To Be Market Leaders

Forrester's research uncovered a market in which IBM Connections, salesforce Chatter and Communities, Jive, Microsoft Office 365, Zimbra Communities, and Tibco tibbr lead the pack. Sitrion, Neudesic, Microsoft Yammer, Atlassian, SAP, OpenText, and blueKiwi offer competitive options. Socialcast by VMware lags behind.

The Market Is No Longer Nascent -- At Least In Terms Of Functionality

While there are still many offerings and the market remains chaotic, the offerings are converging in terms of functional sets. Most products now offer robust activity streams, blogs, wikis, and profiles, and the battleground for differentiation has moved to integration, analytics, and partner ecosystems.

Market Leaders Are Emerging

Enterprise social has become increasingly integrated with adjacent technologies, such as document collaboration, portals, and line-of-business applications like customer relationship management. To that end, vendors with significant leverage like IBM, Microsoft, and salesforce.com will become more dominant on customers' shortlists.

Market Leadership Will Drive Dominant Ecosystems

Enterprise social does not live in isolation. It thrives with business-specific horizontal and vertical extensions. As market leaders emerge, partner ecosystems will follow to exploit the best market opportunities. Leaders will become even more dominant as broader partner ecosystems increasingly equate to broader and deeper capabilities.



The Forrester Wave™: Enterprise Social Platforms, Q2 2014

The 13 Providers That Matter Most And How They Stack Up

by [Rob Koplowitz](#)

with [Peter Burris](#) and Nancy Wang

WHY READ THIS REPORT

In Forrester's 65-criteria evaluation of enterprise social platform vendors, we identified the 13 most significant solution providers — Atlassian, blueKiwi, IBM, Jive, Microsoft, Neudesic, OpenText, salesforce.com, SAP, Sitrion, Socialcast by VMware, Tibco, and Zimbra — in the category and researched, analyzed, and scored them. This Forrester Wave replaces two previous Forrester Waves — The Forrester Wave™: Enterprise Social Platforms, Q3 2011 and The Forrester Wave™: Activities Streams, Q2 2012 — because market conditions have forced these two categories to consolidate. There also has been significant vendor attrition over that period, e.g., Jive is now the only pure-play enterprise social vendor. This report details our findings about how well each solution fulfills our criteria and where each stands in relation to one another in order to help CIO professionals select the right partner for their enterprise social platform.

Table Of Contents

- 2 **Enterprise Social Platform Market Matures Amid Consolidation And Integration**
- 2 **Enterprise Social Platform Evaluation Overview**
- 5 **Broad Integration And Partnership Differentiate The Market Leaders**
- 7 **When The Focus Is On Activity Stream, The Landscape Shifts**
- 9 **Vendor Profiles**
- 13 **Supplemental Material**

Notes & Resources

Forrester conducted lab-based evaluations and interviewed over 50 vendor and user companies, including Atlassian, blueKiwi, IBM, Jive, Microsoft, Neudesic, OpenText, salesforce.com, SAP, Sitrion, Tibco, VMware, and Zimbra.

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ENTERPRISE SOCIAL PLATFORM MARKET MATURES AMID CONSOLIDATION AND INTEGRATION

The enterprise social platform is no longer in its infancy as offerings become increasingly functional. At the same time, market dynamics are driving well-placed offerings into leadership positions based upon sales reach, portfolio integration, and bundling options.

Dominant Vendors Pursue Market Share While Others Differentiate

As this market matures, some vendors have begun to differentiate their offerings. For example, Telligent, a Leader in the last enterprise social platform (ESP) Forrester Wave, acquired Zimbra from VMware and is working on a new offering that integrates email and enterprise social into a new knowledge experience. Telligent targets medium-sized enterprises with this evolved offering and it has gained significant traction in Europe and Asia. Sitrion (formerly known as NewsGator Technologies) and Neudesic are focused on on-premises implementations that provide deep integration with SharePoint and back-end line-of-business applications.

Strategies that provide long-term differentiation will become increasingly important as large vendors with significant marketing and sales resources, as well as deep experience with knowledge workers, begin to flex their muscles. Three in particular are well positioned — IBM, Microsoft, and salesforce.com are all Leaders in this Forrester Wave.

Once Disparate Offerings Converge, But Not Completely

The last time Forrester evaluated this space, we produced two distinct Forrester Waves: The Forrester Wave™: Enterprise Social Platforms, Q3 2011 and The Forrester Wave™: Activities Streams, Q2 2012. Since that time, many activity stream vendors have grown their offerings and the overlap with broader enterprise social platforms has become much larger. In light of these changes, we have combined the Forrester Waves and have created a second set of weightings, scorecards, and graphics for clients that require a more focused activity stream. In the activity stream version, salesforce.com is represented by Chatter, but in the enterprise social platform version, it is represented by a combination of Chatter and Communities.

ENTERPRISE SOCIAL PLATFORM EVALUATION OVERVIEW

To assess the state of the enterprise social platform market and see how the vendors stack up against one another, Forrester evaluated the strengths and weaknesses of top enterprise social platform vendors.

Evaluation Criteria Cover Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 65 criteria, which we grouped into three high-level buckets:

- **Current offering.** To assess product strength, we evaluated each offering against seven groups of criteria: 1) core functionality; 2) language support; 3) architecture and administration; 4) event logs, monitoring, and reporting; 5) security; 6) cross-platform support; and 7) engagement workplace readiness.
- **Strategy.** We reviewed each vendor's strategy, management team, and road map, evaluating how well the vendor's planned enhancements will position it for market leadership and whether or not the vendor has the resources to support that strategy.
- **Market presence.** To determine a vendor's market presence, we evaluated each vendor's financial performance, installed base, integration partners, professional services, number of employees, and technology partners.

Evaluated Vendors Have Broad Capabilities, Market Presence, And Client Interests

Forrester included 13 vendors in the assessment: Atlassian, blueKiwi, IBM, Jive, Microsoft, Neudesic, OpenText, salesforce.com, SAP, Sitrion, Socialcast by VMware, Tibco, and Zimbra. Each of these vendors has (see Figure 1):

- **Offered a breadth of social capabilities.** Participating vendors were required to have most or all of the following: profiles, user home page, activity streams, community/group capabilities, tagging, discussion threads, blog, and wiki. This implies a broad array of social capabilities that represents a fairly level field of comparison.
- **Provided three references of customers in production.** As vendors enter this crowded market on a regular basis, Forrester requires vendors to demonstrate a basic level of market presence and staying power.
- **Received frequent consideration in enterprise social strategy or collaboration strategy.** In order to maintain the Forrester Wave at a manageable number of vendors, Forrester queried our internal customer relationship management system and solicited feedback from appropriate analysts to help determine which vendors were most highly relevant to Forrester clients.

Figure 1 Evaluated Vendors: Product Information And Vendor Selection Criteria

Vendor	Product evaluated*
Atlassian	Confluence
blueKiwi	blueKiwi
IBM	Connections
Jive	Jive
Microsoft	Office 365 (including Yammer)
Microsoft	Yammer
Neudesic	Neudesic Pulse
OpenText	OpenText Tempo Social
salesforce.com	Chatter and Communities
SAP	Jam
Sitrion	Sitrion Social
VMware	Socialcast
Tibco	tibbr
Zimbra	Zimbra Community

*All products evaluated were generally available as of February 2014.

Vendor selection criteria

Vendors offered a breadth of social capabilities. Participating vendors were required to have most or all of the following: profiles, user home page, activity streams, community/group capabilities, tagging, discussion threads, blog, and wiki. This implies a broad array of social capabilities that represents a fairly level field of comparison.

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Source: Forrester Research, Inc.

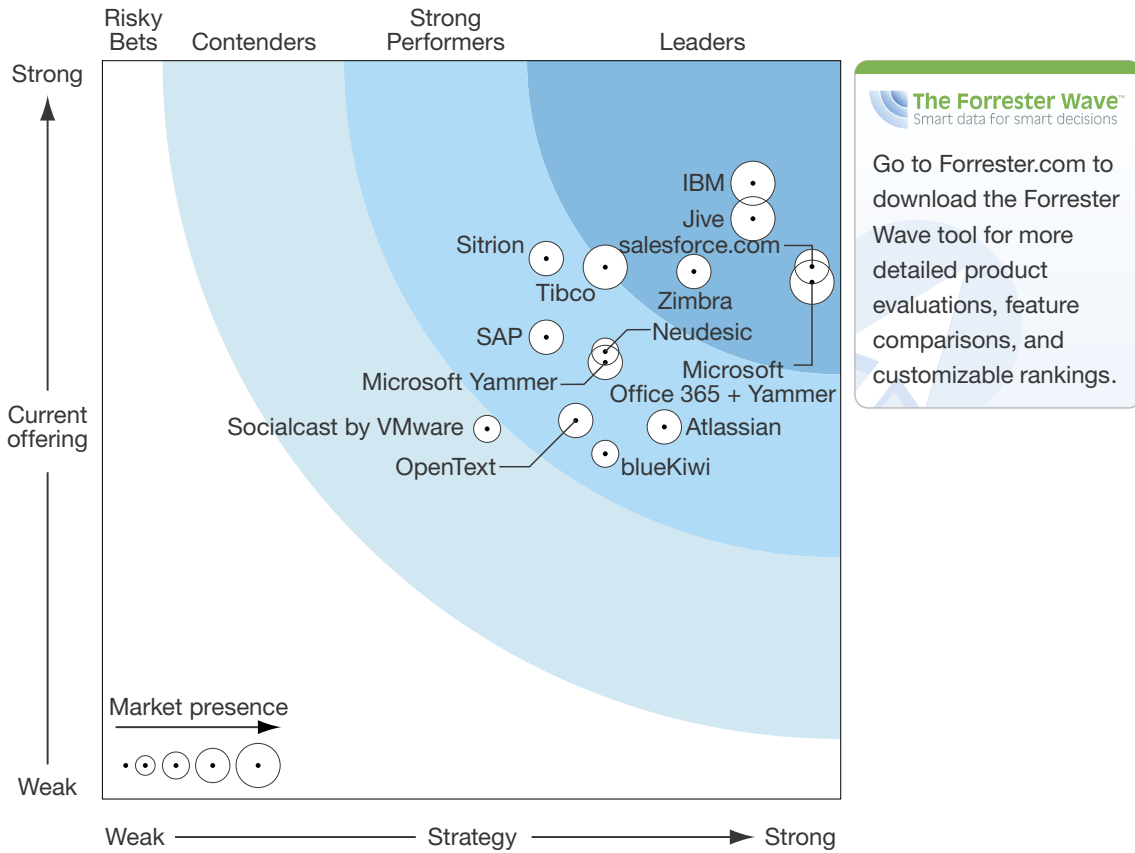
BROAD INTEGRATION AND PARTNERSHIP DIFFERENTIATE THE MARKET LEADERS

The evaluation uncovered a market in which (see Figure 2):

- **IBM, salesforce.com, Jive, Microsoft Office 365, Zimbra, and Tibco lead the pack.** The Leaders all offer very mature and, more importantly, very complete offerings. In addition, each has differentiated in some critical area like integration with a broader portfolio or has provided an established partner marketplace. The end result in each case is a robust core product offering that extends the value through a broader ecosystem.
- **Sitrion, Neudesic, Microsoft Yammer, Atlassian, SAP, OpenText, and blueKiwi follow closely.** The Strong Performers each stand out in multiple areas of the evaluation, but are not as strong across the board as the Leaders. For some vendors, notably Neudesic Pulse and Microsoft Yammer, their standings in the Forrester Wave are more reflections of their heritage as activity stream vendors. If your main concern is activity stream functionality, use the Forrester Wave controls to adjust the weightings and identify the options that best serve that more narrow set of needs.
- **Socialcast by VMware focuses on activity stream.** Socialcast is another offering that fairs better in the activity-stream-focused version of this evaluation and is designed to be part of a larger offering of knowledge-worker technologies from VMware.

This evaluation of the enterprise social platform market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 2 Forrester Wave™: Enterprise Social Platforms, Q2 '14



Source: Forrester Research, Inc.

Figure 2 Forrester Wave™: Enterprise Social Platforms, Q2 '14 (Cont.)

	Forrester's Weighting	Atlassian	blueKiwi	IBM	Jive	Microsoft Office 365	Microsoft Yammer	Neudesic	OpenText	salesforce.com	SAP	Sitron	Socialcast by VMware	Tibco	Zimbra
CURRENT OFFERING	50%	2.52	2.34	4.17	3.93	3.50	2.96	3.03	2.56	3.61	3.13	3.66	2.51	3.61	3.57
Core functionality	40%	2.44	2.63	4.04	3.98	3.54	2.37	2.95	2.30	2.80	3.24	3.93	1.99	3.57	3.63
Language localization	5%	3.68	1.34	3.34	2.68	5.00	5.00	1.00	1.34	4.33	3.35	2.01	1.34	2.01	4.34
Architecture and administration	10%	2.30	2.30	3.30	3.90	2.90	2.70	2.90	3.40	3.10	2.30	3.70	2.60	2.90	3.20
Event logs, monitoring, and reporting	5%	3.00	3.00	5.00	5.00	3.34	3.00	3.66	3.33	5.00	2.01	3.66	3.33	4.32	5.00
Security	10%	2.75	4.00	4.50	4.75	4.25	4.25	2.50	4.50	4.50	4.00	4.50	3.50	4.25	4.25
Cross-platform support	10%	1.00	1.50	5.00	3.00	3.50	3.50	2.50	2.00	5.00	3.00	3.00	3.00	3.50	1.50
Engagement workplace readiness	20%	3.00	1.45	4.30	3.95	3.00	2.85	4.15	2.10	3.80	3.20	3.40	2.85	4.00	3.80
STRATEGY	50%	3.80	3.40	4.40	4.40	4.80	3.40	3.40	3.20	4.80	3.00	3.00	2.60	3.40	4.00
Executive vision and strategy	100%	3.80	3.40	4.40	4.40	4.80	3.40	3.40	3.20	4.80	3.00	3.00	2.60	3.40	4.00
MARKET PRESENCE	0%	3.33	2.10	4.58	4.30	4.66	3.17	2.41	3.29	3.82	3.88	3.24	2.58	4.32	3.24
Installed base	34%	3.00	1.00	3.75	3.25	4.00	2.25	1.25	1.75	2.50	3.00	2.25	1.75	3.00	1.75
Employees	33%	2.00	4.00	5.00	5.00	5.00	4.00	4.00	4.50	4.00	5.00	3.50	4.00	5.00	3.00
Partners	33%	5.00	1.34	5.00	4.67	5.00	3.30	2.00	3.68	5.00	3.68	4.01	2.01	5.00	5.00

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

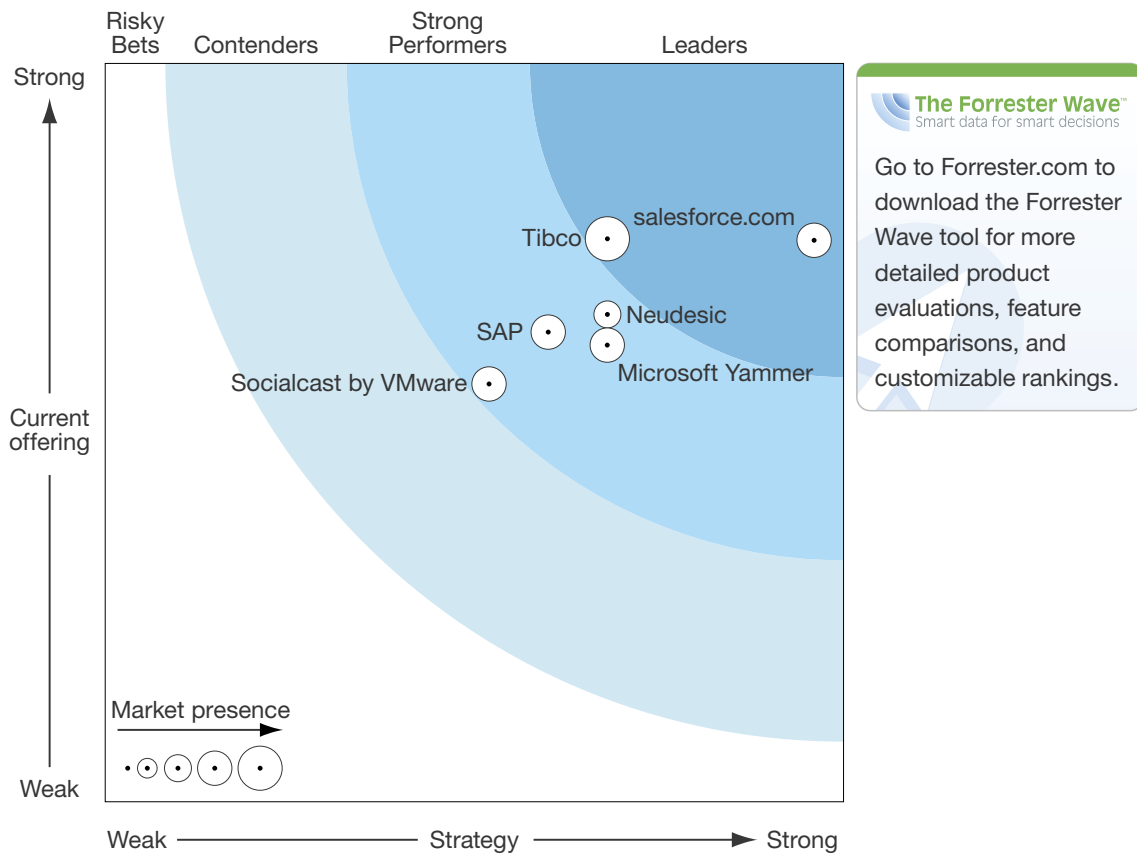
Source: Forrester Research, Inc.

WHEN THE FOCUS IS ON ACTIVITY STREAM, THE LANDSCAPE SHIFTS

While we are consolidating the social business and collaboration (SBC) and activity stream categories in this Forrester Wave — mainly because we see a convergence taking place in the market that must be reflected in our Forrester Wave analysis — we know that the needs of many clients can be addressed by more narrow activity stream offerings. For these clients, we are breaking out a view of the activity stream Forrester Wave data (see Figure 3):

- **Salesforce Chatter and Tibco lead the pack.** The Leaders both face a strong emphasis on integration. In the case of Chatter, the integration is particularly compelling with salesforce customer relationship management (CRM) and the other participants in the Force.com platform. Tibco thrives with Tibco middleware. Both offerings are functionally strong across the board. Note that for the activity stream-focused analysis Forrester evaluated salesforce Chatter, but for the broader analysis, Chatter and Communities were also evaluated.
- **Neudesic, Microsoft Yammer, SAP, and Socialcast by VMware are Strong Performers.** Each of the Strong Performers offers deep integration with a potentially critical asset. In the case of Neudesic, the asset is SharePoint on the front-end and a variety of services on the back-end. Yammer thrives in the Office 365 environment and with any SharePoint implementation. SAP offers a compelling vision of social enabled business applications starting with legacy SuccessFactors and moving to the full SAP portfolio over time. Socialcast augments the broader VMware offerings.

Figure 3 Forrester Wave™: Enterprise Social Platforms, Q2 '14 — Activity Streams



Source: Forrester Research, Inc.

Figure 3 Forrester Wave™: Enterprise Social Platforms, Q2 '14 — Activity Streams (Cont.)

	Forrester's Weighting	Microsoft Yammer	Neudesic	salesforce.com	SAP	Socialcast by VMware	Tibco
CURRENT OFFERING	50%	3.09	3.30	3.80	3.18	2.83	3.82
Core functionality	40%	2.69	3.61	3.29	3.36	2.80	4.10
Language localization	5%	5.00	1.00	4.33	3.35	1.34	2.01
Architecture and administration	10%	2.70	2.90	3.10	2.30	2.60	2.90
Event logs, monitoring, and reporting	5%	3.00	3.66	5.00	2.01	3.33	4.32
Security	10%	4.25	2.50	4.50	4.00	3.50	4.25
Cross-platform support	10%	3.50	2.50	5.00	3.00	3.00	3.50
Engagement workplace readiness	20%	2.85	4.15	3.80	3.20	2.85	4.00
STRATEGY	50%	3.40	3.40	4.80	3.00	2.60	3.40
Executive vision and strategy	100%	3.40	3.40	4.80	3.00	2.60	3.40
MARKET PRESENCE	0%	3.17	2.41	3.82	3.88	3.09	4.32
Installed base	34%	2.25	1.25	2.50	3.00	3.25	3.00
Employees	33%	4.00	4.00	4.00	5.00	4.00	5.00
Partners	33%	3.30	2.00	5.00	3.68	2.01	5.00

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- IBM Connections expands its scope.** IBM continues to tap assets across its broad portfolio to build the value of Connections. While there have been numerous enhancements since The Forrester Wave™: Enterprise Social Platforms, Q3 2011, two in particular have changed the landscape for this offering. First, with the release of Connections 4.5 in April 2013, IBM introduced robust, scalable document management with Connections Content Manager and pushed the product into the role of a full engagement workplace rather than a focused enterprise social solution. Second, with the increasing integration with Kenexa, IBM is bringing social to talent management, both as an application (social in HR) and as a feature (talent management integrated into other enterprise social applications). Connections shines if you are looking for a broad robust offering with strong integration across the IBM portfolio.

- **Salesforce Chatter leverages Communities.** The last time we evaluated Chatter, the core differentiator was the ability to integrate deeply with the broader salesforce CRM and salesforce automation offerings. While those continue to drive value, Chatter now has deep integration with salesforce Communities to create a bridge between employees and customers. Forrester evaluated Chatter and Communities for the enterprise social platform portion of this analysis and Chatter by itself for the activity stream portion. Because of its heritage, salesforce.com is especially strong with applications focused on revenue generation — which is a particularly crucial focus of the social business landscape. Chatter and Communities shine when you are looking to create a bridge from salesforce CRM to your enterprise and your customers.
- **Jive thrives on user experience.** Jive is the last of what was once a rich landscape of pure-play enterprise social vendors. As others have been acquired or faded into the background of a crowded vendor landscape, Jive continues to thrive by emphasizing user experience across all devices. To that end, it has invested in areas like deep email integration with Microsoft Outlook and purpose-built applications for mobile users to facilitate high-value functions like expertise location. Jive also recently announced a partnership with Cisco to bring integrated Unified Communications to the overall Jive social business offering. Jive shines when you require a best-in-breed solution with an excellent user experience across all user environments and devices.
- **Microsoft Office 365 begins to fulfill the Yammer promise.** As predicted by Forrester, Microsoft has provided clear guidance that Yammer is the social engine for its offerings and Yammer will be supported by the broader portfolio to provide adjacent capabilities.¹ With Office 365, Microsoft begins the process of deeply integrating Yammer for social with SharePoint for document management, team sites, and other functions. The next announced experience, which is code-named Oslo and scheduled to be released by the end of 2014, will provide the first unique Office 365 application that spans multiple applications to generate a social graph and drive recommendations for workers. With the bundling of Yammer into Office 365 at no charge, Microsoft can advance the platform as an integrated set of services rather than disparate applications. Office 365 shines when you require a full suite of capabilities in a cloud environment and desire integration and alignment with the broad Microsoft portfolio.
- **Zimbra Communities is still strong and is now part of a broader story.** The offering was a Leader in The Forrester Wave™: Enterprise Social Platforms, Q3 2011, under the name Telligent and was rebranded following the acquisition of Zimbra. While it continues to be offered as a standalone social offering, the company and product strategy will increasingly focus on a new integrated worker experience that combines email, calendaring, task management, and enterprise social capabilities. With this strategy, Zimbra will look to break down barriers between traditional knowledge worker technologies and create a new and more compelling experience that accesses functionality as integrated services to work in the context of each other. Zimbra shines for organizations that are looking for a radically new and potentially very powerful user experience.

- **Tibco tibbr expands its breadth of offering.** Tibbr was a Leader in The Forrester Wave™: Activities Streams, Q2 2012, and, as this Forrester Wave shows, remains a viable offering for organizations looking for focused activity stream functionality. However, Tibco has grown the offering to become a much more robust enterprise social platform offering, particularly when paired with pre-integrated offerings like Huddle for document collaboration. Tibbr is also at the forefront of leveraging geolocation for situational analysis to target content and expertise recommendations. Tibbr shines when it is aligned with Tibco's middleware as a strategy to socially enable a broad heterogeneous computing environment.

Strong Performers

- **Sitrion Social adds integration to core social to extend SharePoint.** Sitrion (formerly NewsGator Technologies) is the only offering evaluated that runs natively on Microsoft SharePoint. With Microsoft's recent guidance that Yammer will be its recommended social solution, Sitrion becomes a preferred solution for organizations seeking high quality enterprise on-premises social to fully complement SharePoint. Sitrion extends the on-premises value proposition with deep back-end line-of-business integration and a strategy to drive social business solutions through horizontal application specialization. While representing a unique and compelling on-premises solution, Sitrion also offers a wide array of deployment options, including a cloud option. Sitrion shines when best-in-class enterprise social for on an on-premises implementation meets line-of-business integration.
- **Neudesic Pulse places focus on integration to drive vertical processes.** Pulse is designed to leverage the full value of a pure on-premises solution. To that end, it thrives in highly regulated and highly secure deployments. Neudesic has a long history of providing custom application solutions through its professional services and software products arms and leverages Pulse as a productized extension of that strategy, allowing the development of social-enabled extensions to existing line-of-business applications. Pulse also offers deep integration with Microsoft SharePoint for organizations looking to provide best-in-class social in an on-premises model. Pulse shines in an on-premises environment where deep and meaningful line-of-business integration, supported by a strong professional services offering, is required.
- **Microsoft Yammer focuses on a defined role in a bigger offering.** With Yammer now fully absorbed by Microsoft, the process of defining the role of the offering in relation to the overall portfolio is well underway. To that end, many of the product enhancements that were in process during The Forrester Wave™: Activities Streams, Q2 2012, such as document integration and page publishing, have been removed and are now handled by other Microsoft solutions, mainly SharePoint. The strategy allows Yammer to play the primary role of providing social capabilities to the entirety of the Microsoft portfolio. This concentration pushes Yammer into a more

focused niche as a standalone offering, but offers the best strategy for customers using multiple Office solutions and is particularly powerful in the context of Office 365. Yammer shines when an outstanding user experience is required, particularly when coupled with SharePoint and the rest of the Microsoft portfolio.

- **Atlassian Confluence extends from social content authoring to a full social platform.** Confluence began life as a wiki designed for tech management professionals and has grown into a full enterprise social platform. Atlassian has kept the offering true to its roots with deep integration with its JIRA issue tracking application, but has expanded Confluence to be relevant to a broader business audience. With the addition of true social capabilities, such as a robust activity stream and deep integration with its HipChat real-time chat and document sharing application, Atlassian offers a wide array of knowledge-worker technologies. Confluence shines when enterprise social complements a new way to manage overall knowledge worker content management.
- **SAP Jam makes a solid entry to a crowded market.** SAP has taken a circuitous path to enterprise social but is quickly getting its bearings. Jam is well positioned as a general-use enterprise social product and could be a very valuable addition to SAP's overall portfolio over time. The baseline technology was originally from CubeTree which came to SAP via the SuccessFactors acquisition. The technology has been extended, including rebuilding much of the functional capability that was originally part of SAP's homegrown StreamWork offering. The result is a pure software-as-a-service (SaaS) offering that, while still young, represents a strong offering. Integration between SuccessFactors and SAP is strong, and SAP has a vision of "social enabling" much of its application portfolio. More importantly, SAP recently announced platform capabilities that are accessible to third-party developers and partners. With this strategy now in place, SAP has the opportunity to extend Jam to a strong position across a significant partner ecosystem.
- **OpenText Tempo takes on its role as part of content's life cycle.** OpenText provides end-to-end management of content, from Tempo for enterprise social all the way to back-end archiving and management. Tempo fits in that continuum as a social layer for the back-end system of record as well as the OpenText Portal. Organizations that depend on OpenText for content management and require diligent management of social content and communications should look to Tempo as an extension of the overall OpenText investment. Tempo shines when deployed as a social layer of an overall OpenText information management strategy.
- **BlueKiwi supports the Atos Zero email initiative.** Atos garnered a lot of media attention a few years ago with its Zero email initiative. Soon thereafter it acquired French enterprise social vendor blueKiwi and began reaping the benefits of its approach to customers. It has had particular success for a variety of reasons, but mainly because of its large footprint of professional services. The fact that blueKiwi is offered primarily as a SaaS offering from a European company and is housed in a European data center appeals to European customers concerned about the effects of the US Patriot Act and National Security Agency (NSA) activity on US-based data centers. However, beyond that, the combination of a strong social offering in the form of

blueKiwi and change management support from Atos creates a compelling story for getting to enterprise social adoption and business value in an accelerated fashion. BlueKiwi shines when SaaS is the preferred deployment mechanism and when coupled with through leadership on redefining knowledge-worker communications away from email. It is especially compelling for customers looking for a solution from a European vendor that uses European data centers.

Contenders

- **Socialcast by VMware stays the course.** VMware continues to build its offering for knowledge workers with Socialcast ultimately becoming the social layer to other VMware technologies like the document collaboration capabilities from recently acquired AirWatch. Socialcast offers strong standalone capabilities as well, with a focus on the activity stream as a central point of interaction. To that end, Forrester includes Socialcast as an enterprise social platform vendor but the offering fairs better in the activity stream-focused analysis. Socialcast shines when coupled with the broader VMware portfolio and end user strategy.

SUPPLEMENTAL MATERIAL

Online Resource

The online versions of Figure 2 and Figure 3 are Excel-based vendor comparison tools that provide detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

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

- **Hands-on lab evaluations.** Vendors spent half day with a team of analysts who performed a hands-on evaluation of the product using a scenario-based testing methodology. We evaluated each product using the same scenario(s), creating a level playing field by evaluating every product on the same criteria.
- **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 to three 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. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Integrity Policy

All of Forrester's research, including Forrester Waves, is conducted according to our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

ENDNOTES

- ¹ We predicted that Microsoft would become increasingly dependent on Yammer for social and the cloud as a preferred deployment option for customers. For more, see the August 13, 2013, "[Is Yammer + SharePoint Right For You](#)" report.

About Forrester

A global research and advisory firm, Forrester inspires leaders, informs better decisions, and helps the world's top companies turn the complexity of change into business advantage. Our research-based insight and objective advice enable IT professionals to lead more successfully within IT and extend their impact beyond the traditional IT organization. Tailored to your individual role, our resources allow you to focus on important business issues — margin, speed, growth — first, technology second.

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« CAROL ITO, client persona representing CIOs

