Workplace Service

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The Aragon Research Tech Spectrum™ for Mobile Collaboration, 2015: Mobile Collaboration Disrupts

Summary: There is a growing shift to Mobile Collaboration. Enterprise collaboration planners should evaluate collaboration technology providers on how well they support the growing remote and mobile workforce. Aragon Research introduces its Tech Spectrum for Mobile Collaboration and evaluates 13 vendors in the market.

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Introduction

The BYOD phenomenon has been a significant factor in shaping the boundaries of the new mobile and collaborative workplace. People are more mobile now than they ever were before. Workers now own and control a large part of their own connective infrastructure, and they are using it to give themselves unprecedented control over how, when and where they get their jobs done. In doing so, they intensify the challenge of coordinating their interactions with the counterparties and collaborators they still have to work with. In this research note, we define the emerging Mobile Collaboration market and review 13 major providers.

Why Mobile Collaboration?

Mobile Collaboration is a necessity to support the needs of the increasingly mobile workforce. The emerging Mobile Collaboration providers have been catalysts in spurring on this trend. Incumbents like Microsoft, Cisco, IBM and other UCC players now have mobile offerings to extend the functionality of their platforms. But consumer trends often predict what will happen in the enterprise once critical mass is reached, and we see this happening with Mobile Collaboration. Consumer messaging tools have long been used in enterprises for business purposes, and now, mobile messaging is being driven in part by consumer apps from the likes of WhatsApp (bought by Facebook), WeChat (popular in China) and Snapchat, amongst others. Amidst the inevitable concerns about security and manageability, new players are emerging to evolve mobile messaging into the more complete category of Mobile Collaboration with an enterprise focus.

Consumer Success - and the Shift to the Enterprise

The success of tools like Apple iMessage, Skype and WhatsApp tells us that users want to communicate quickly, easily and conveniently when they need to and on whatever device they are using at the time of communication. They also want the same level of convenient communication with their business colleagues that they have in their personal lives. This business use of personal tools is a major driver of IT consumerization. Just like the impact and viral adoption of consumer IM services forced enterprises to include IM in their communication and collaboration strategies to meet user demand, Mobile Collaboration is doing the same. IM and Presence eventually evolved to become the central element for UC and a launching pad for all types of modalities.

Mobile messaging and communication apps have been a disruptive force in the telecom industry. They have challenged existing distribution and revenue models. It was only a matter of time before this trend would collide with enterprise messaging and collaboration strategies.

Mobile Collaboration apps are making it easier for people to interact with internal and external colleagues and partners on any device, without barriers. The disruptiveness of these tools lies in their ability to take communication and messaging control away from carriers and telecom providers.

Messaging Gets Priority over Email

The fact that messaging is the most direct way to reach someone has large enterprise implications. Today, most knowledge workers bypass email when they need to reach someone. Over time, Mobile Collaboration represents the most significant shift away from traditional email in the enterprise, but in many situations it will be use-case driven.

Teams, then Enterprise

In enterprises, we see Mobile Collaboration being adopted at the team level first. In many of the scenarios we reviewed, a specific team found and deployed the Mobile Collaboration offering. For example, we see marketing teams using Mobile Collaboration for events to coordinate and communicate with both the internal and extended teams responsible for the event.

In the second half of 2016, expect to see larger deployments, in part because products will mature and the usage models will be better understood. Also, as traditional enterprise players enter the space, focus will be placed on an enterprise platform. However, these platforms will increasingly be more open and will be positioned as PaaS with extensive developer communities and ecosystems, in order to extend and embed capabilities into business applications.

Characteristics of Mobile Collaboration Tools

Mobile Collaboration combines cross-platform synchronous and asynchronous interaction modes with elements of collaboration infrastructure that may be mobile-first or mobile-optimized, but must at least be mobile-friendly. It includes point-to-point and group chat/IM, audio and video, and screen/file sharing, backed up by presence and by social group and community services like activity streams, news feeds, profiles and expertise location. WebRTC has enabled many Mobile Collaboration applications to support real-time communications and screen sharing. For example, Slack acquired Screenhero, which had a WebRTC-based collaborative screen-sharing tool. WebRTC and Cloud have reduced the barrier to entry for providers in the Mobile Collaboration space.

A primary focus of Mobile Collaboration is to facilitate teamwork and team building for mobile users. Enterprises may also expand the productivity ecosystem with document collaboration features like interactive annotation and group authoring or editing.

Mobile Collaboration Features

The fundamental features of a Mobile Collaboration offering include (see Figure 1):

Interaction Modes

- Messaging: text chat/IM
- Voice and video calling
- Persistent group chat
- Web and video conferencing
- File sharing and document collaboration

Infrastructure Elements

- Presence
- Profiles
- Activity streams and news feeds
- Directory support
- Administration

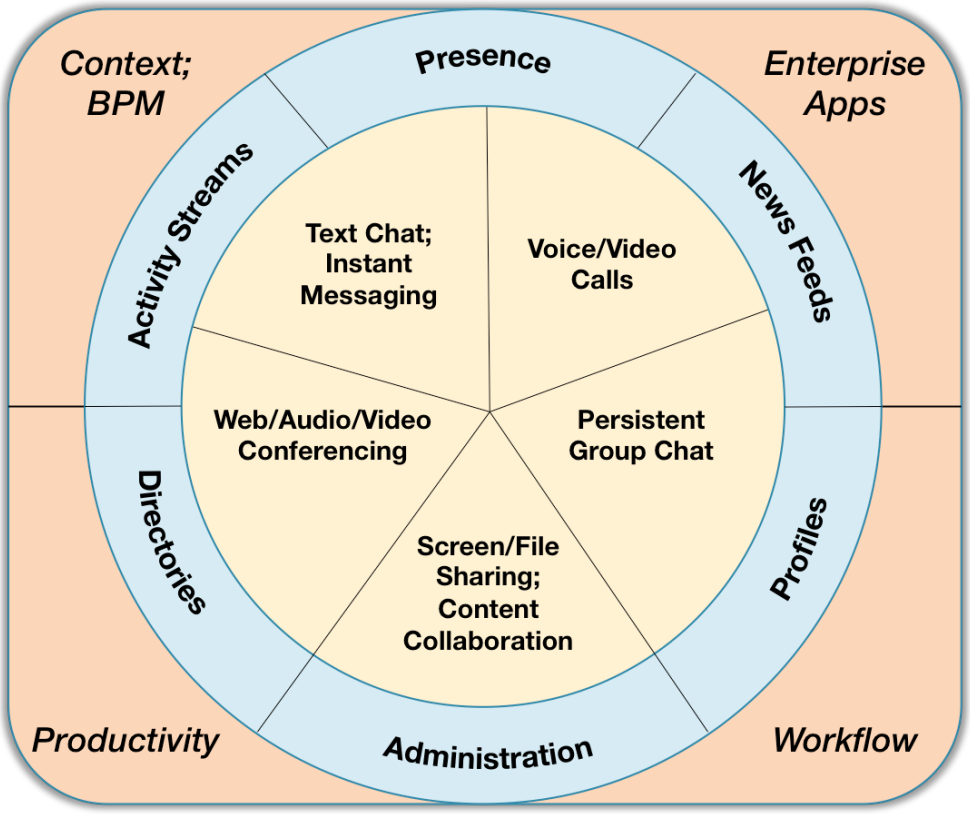

*Figure 1: Elements of Mobile Collaboration (**Center:** Interaction Modes; **Middle ring:** Collaboration Infrastructure; **Outer box:** Enterprise Ecosystem)*

Basic versus Full Feature Set

One area that we noticed in our evaluation is that there are some providers that have a full Unified Communications and Collaboration back-end set of Cloud Services (Voice and Video) while others had a more limited feature set and were focused on peer-to-peer messaging. We compared features to the specific business use cases they supported.

The Need for Enterprise Control and Administration

Enterprises need to look beyond consumer and personal tools to ensure that they have the proper administrative controls to secure their people and data. Mobile Collaboration supports external interactions on a broader scale than traditional on-premises UC or UCC tools, so it requires updated administration and security tools. Conversely, Mobile Collaboration products have to integrate with enterprise directory services, including full LDAP and Active Directory.

Pricing

Most Mobile Collaboration providers use a three-tiered "freemium" price model, with a free entry level similar to consumer tools, a middle tier that adds features for an incremental price increase, and an enterprise tier that includes security, administration and other back-end features at the high end. Some providers offer specialized middle tiers aimed at team, project or departmental deployments. Enterprise tiers are usually seat-based, with per-seat discounts as the number of users goes up.

Business Process Integration

Beyond the collaboration ecosystem itself is the outer layer of integration shown in Figure 1: the contextualization of collaborative interactions as workflow events in specific business processes. Aragon calls this *Structured Collaboration*, and it is key to reducing waste and increasing the productivity of collaborative activities (we covered this in Research Note 2015-18, *Structured Collaboration*, published in May 2015).

Tech Spectrum Overview

The Aragon Research Tech Spectrum is our newest market evaluation tool that graphically represents analysis of both emerging and mature markets and the vendors that participate in them. We use a rigorous analysis of each vendor using two dimensions that enable comparative evaluation of the participants in a given market.

The Tech Spectrum looks at a focused set of criteria that helps enterprise planners understand and navigate the market of technology provider options.

The Aragon Research Tech Spectrum is segmented into three sectors, representing high and low on both the Product/Service and performance dimensions. Vendors fit into one of the following sectors:

Leaders

Leaders are the providers who have comprehensive strategies and products/services that align with industry direction and market demand, and who effectively perform against that strategic backdrop. Leaders help to drive a market and in a majority of cases, have a vision for the future.

Contenders

Contenders are those providers with strong performance, but with more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.

Promising

Promising providers have strong strategic understanding and objectives, but have yet to perform effectively across all elements of that strategy. This category includes breakout or emerging players that may focus on specific capabilities.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness**: Market awareness of the firm and its product.
- **Customer experience**: Feedback on the product, installs, upgrades and overall satisfaction.
- **Viability**: Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging**: Is the offering priced and packaged competitively?
- **Product**: The mix of features tied to the frequency and quality of releases and updates.

- **R&D**: Investment in research and development as evidenced by overall architecture.

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Inclusion Criteria

The *Tech Spectrum for Mobile Collaboration, 2015* will help clients differentiate the many vendors who offer tools to let enterprises collaborate over mobile and desktop devices, asynchronously and in real-time.

The inclusion criteria for this Aragon Research Tech Spectrum are:

- **Revenue**: A minimum of $2 million in primary revenue for Mobile Collaboration or a minimum of $7 million in revenue in a related market (collaboration, web and video conferencing)
- **Shipping product**: Product must be announced and available
- **Customer references**: Vendor must provide at least three customer references using its Mobile Collaboration product
- **Features**: Vendor should have at least six of the ten features listed under “Mobile Collaboration Features” above

The Tech Spectrum™ for Mobile Collaboration, 2015

(As of August 2015)

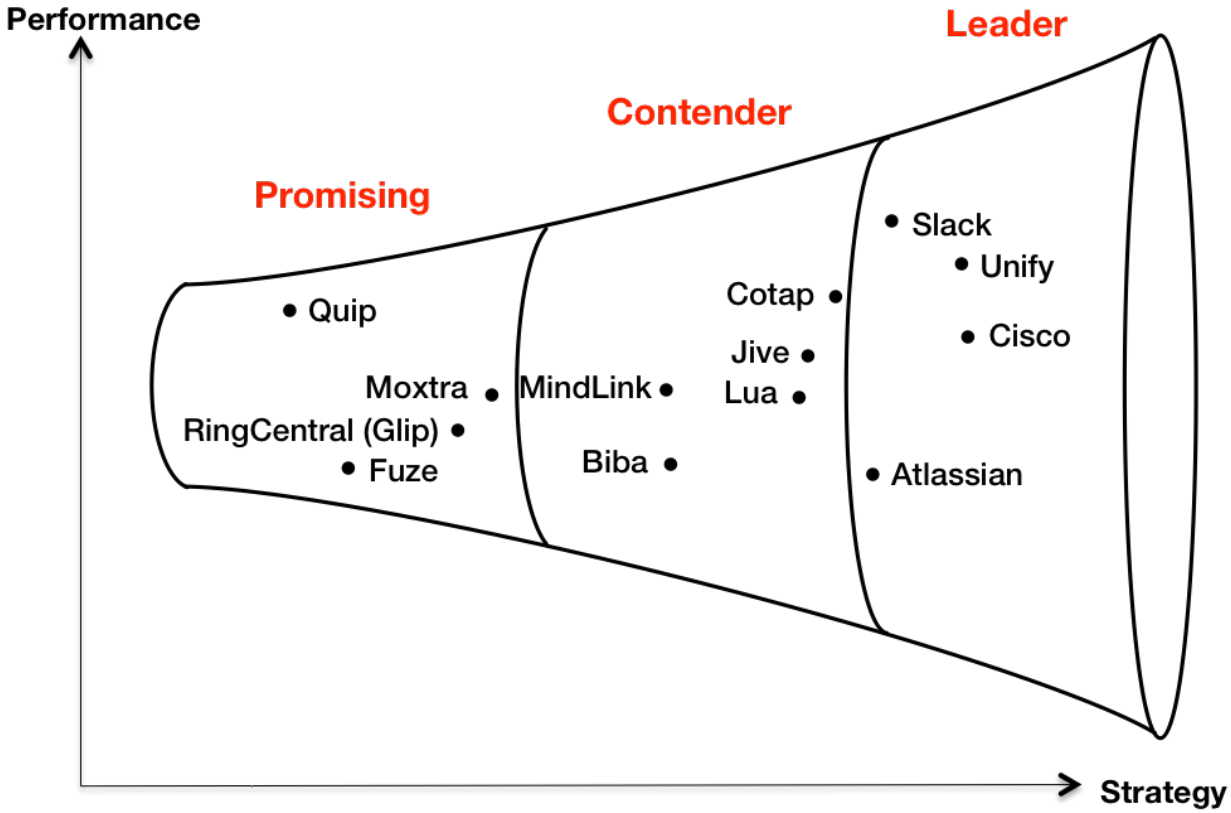

Figure 2: The Tech Spectrum™ for Mobile Collaboration, 2015

Aragon Research

Leaders

Atlassian

Atlassian's HipChat is positioned as a deployment-agnostic collaboration tool. It allows users to create and track unlimited numbers of chats, which can be used as tabs for individual projects. The application allows users to collaborate through text or video chat, and comes with built-in file sharing. HipChat can also integrate with a large variety of enterprise-level software, and is available as a mobile application and as a desktop application.

HipChat has focused its development on UCC and has built its product to support the BYOD trend. HipChat is available as a native app on Windows, iOS, Android, Mac OSX and Linux. By allowing its users to go mobile while retaining their collaboration tools, it gives users a UCC experience that enables them to track progress on multiple projects across multiple devices.

Enterprises looking for flexible, highly integrable software that includes mobile access should look at HipChat, due to the highly mobile nature of the software. Enterprises that place emphasis on supporting collaboration for their mobile workforce should also consider HipChat because of the large variety of native applications it provides.

Strengths

- Multimodal project and team-centric collaboration
- Integrations
- On-premises deployment option

Challenges

- Users report admin functions aren't very intuitive

Cisco

Cisco Spark is a new Mobile Collaboration product that supports desktops as well as tablets and smartphones. As business becomes more mobile, it becomes more difficult to keep track of all the different projects going at once. Cisco Spark makes that easier by unifying teams into virtual "rooms." In one of these rooms, which can be for just two people or for larger groups, users can interact with each other about any project or topic and share messages and files. Spark also has video chat and screen sharing functions, allowing for better real-time collaboration.

When using Cisco Spark for project work, users can connect their calendars and contact books for simple "room" setup with the people they already work with the most. In addition, Spark has end-to-end encryption of messages and files as well as user and IT level controls for added security.

Enterprises that already use Cisco services should consider Cisco Spark. Other collaboration services, such as Cisco WebEx, integrate well with Spark, meaning there will be seamless escalation of meetings and communications modalities when adding Spark.

Strengths

- Security
- Ease of use
- Escalation from chat-to-voice and video meetings

Challenges

- Lacks tasks

Slack

Slack has emerged as one of the more popular of the new Mobile Collaboration providers. It supports desktop and mobile platforms and includes rich collaboration and productivity capabilities. It supports team collaboration, where users can be part of groups and specific channels within groups for project-specific tasks. Slack is a web-based service that supports desktop, iOS and Android clients. Its API framework allows integration with services such as Dropbox, Google Drive and others.

Slack is able to merge real-time and asynchronous collaboration capabilities with related content in the context of an overall collaborative interaction.

Enterprise collaboration planners in IT and the business should look at Slack when looking to streamline team and project-based collaboration initiatives.

Strengths

- Team-oriented
- Document sharing
- App integration (App Store)

Challenges

- Enterprise scale
- Perception of Security (Added Two-factor authentication in March of 2015)

Unify

Unify's Circuit Mobile Collaboration product is an innovative, first of its kind offering from a UCC vendor. Circuit brings teams together by giving them a persistent space to collaborate in, filled with all of the tools needed for UCC. Circuit provides file sharing, chat, video calling, voice, and screen sharing all from one location. It lets teams collaborate and connect from a single location, making it easy to keep track of projects and people. It also has a built-in search function, so teams can find what they are looking for without hassle.

Circuit also comes with a mobile application for both iOS and Android. The mobile application is linked to the desktop one, so if you need to leave work, all files and calls can be moved from the desktop to your mobile device, even if you are in the middle of a call. Circuit also integrates with Box, so users can share files whether they are in the Cloud or on a desktop. Also, Circuit is based in the Cloud, so users don't need to worry about losing or leaving files behind.

Enterprises that are looking for full UCC support with voice integration should look at Circuit because of its call-movement capabilities and its ability to move files from desktops to mobiles and vice versa.

Strengths

- Enterprise and carrier grade scalability
- Full UCC features
- Voice Integration

Challenges

- Awareness outside of Unify customer base

Contenders

Biba

Biba has been launched for over two years now and represents a major challenge to traditional UC and UCC players. While UC players have tried to come up with mobile UC strategies to embrace mobility, they are still based primarily on existing UC capabilities. Users want to easily collaborate and conference in teams via text chats, audio, video and screen sharing wherever they are and on whatever device. Biba supports these features, focusing on a mobile first user experience paradigm.

Mobile UC has not received much traction despite vendor hype. The Biba app enables collaboration and conferencing functionality on mobile devices and desktops at a fraction of the cost of existing UC vendors. So while mobile UC clients are not becoming widely adopted, Biba has a strong opportunity to position around Mobile Collaborative interactions and conversations, which is driving mobile messaging. Biba also supports video conferencing, along with persistent group chat and chat-room capabilities at an attractive cost.

Enterprises looking for a full featured, low cost Mobile Collaboration solution that supports web, video and audio modalities should include Biba in their evaluation.

Strengths

- Full UCC features
- Affordable

Challenges

- Market awareness
- Lacks tasks

Cotap

Founded by two former Yammer executives, Jim Patterson and Zack Parker, Cotap is a signal of the new mobile messaging phenomenon that is changing the playing field for employee access to business applications, information and processes. The problem with Legacy applications is that they often restrict remote employee access to information and data, especially when it is needed in real time, such as in a customer support scenario. Cotap both addresses this and provides a solution to this problem.

Cotap's mobile messaging application scans the user's phone address book for contacts that share the same work email domain. This begins to create a network of work contacts such that if anyone else joins Cotap from that company, they get immediate access to everyone from their work email domain, whether they are in their own address book or someone else's.

With its last round of funding in 2014, Cotap extended its platform to include desktop support. This funding also helped them to build out the client base for a premium service offering that launched in April 2014. What's unique about the Cotap vision is a consumer-style democratization of access to people and information. Cotap's platform aims to give every worker, from store clerk to executive, access to interactions with colleagues and data, which previously had been limited. Enterprises developing BYOD strategies should look at Cotap to easily create separate work directories.

Strengths

- Multiple integrations into Salesforce, OneDrive, Google Drive
- Ease of use
- HIPAA compliance

Challenges

- Market awareness

Jive Software

Jive is one of the major enterprise social software providers. It launched Jive-w, a new Mobile Collaboration suite of apps including Jive Chime, Jive Circle and Jive Daily, which offer messaging, directory and interactive group updates, respectively. The goal was to develop easy-to-deploy, easy-to-use and secure solutions for mobile teams or organizations. The apps are standalone but integrate tightly together. For example, a Jive Circle user can single-click to email, call or Jive Chime message a contact. In the near term, Jive has plans to integrate these apps with its social platform that offers enterprise-grade security, interactivity, directory, SSO, scalability and other capabilities.

Jive Chime is a real-time team messaging application that functions on both desktops and mobile devices. Offering persistent group chat, Chime provides a secure place for enterprise teams to share information about projects, and it allows them to easily communicate.

Jive Daily provides enterprises with a space to keep employees informed. Daily allows any user to send out a targetable message and track it, giving the poster real-time analytics about who has viewed the message so that enterprises can improve their internal communication. Users can also interact with posts and discussion, encouraging employee feedback with immediate analytics to measure the level of engagement.

Jive also recently released its third app, Jive Circle, which is a modern corporate directory built for mobile devices. It is designed to make it easier and faster for employees to search, identify and communicate with key contacts. It supports directory capabilities such as viewing org charts, expertise and contact information. In addition, it offers a single click option to email, call or Jive Chime message contacts quickly.

Enterprises looking to increase employee connectivity and engagement should look at Jive-w apps. The integrated set of apps works in tandem as a complimentary suite of mobile solutions. They are also supported with an IT management console including the ability to grant or revoke user access. Enterprises that already use Jive should also consider its mobile suite of apps, Jive-w, because Aragon expects it to integrate in the near term with its existing social platform.

Strengths

- Social collaboration
- Can establish/designate public and private groups
- Social Directory support with Jive Circle

Challenges

- Lack of web and video conferencing support

Lua

Founded in 2011, Lua targets security-minded enterprises with its Mobile Collaboration offering, which was officially released in 2013. While consumer mobile messaging apps leave enterprises concerned about security, Lua provides secure mobile communication across many platforms. Lua offers an interactive directory that enables fast and easy access to colleagues and collaborators. In 2015, the company announced partnerships with VMware and Citrix, providers of enterprise mobile management (EMM) tools. Lua boasts a diverse, cross-industry and vertical list of customers.

Lua provides secure, targeted access to co-workers, and it brings content into collaborative interactions to provide context to ongoing business processes. Lua's ReadReports feature also ensures that employees can be confident their messages are read and acted upon.

Enterprises looking for a secure Mobile Collaboration platform should evaluate Lua. In addition, when visibility of how people work together is needed, Lua's Insights dashboard provides analytics on cross-departmental interactions to help improve effectiveness and drive business decision-making.

Strengths

- Analytics dashboard
- Search
- Active Directory integration

Challenges

- Lacks support for video chat and tasks

MindLink

MindLink provides secure enterprise chat (IM and Group Chat) designed to integrate with critical business applications. MindLink supports desktop and mobile, and places emphasis on integration with both Microsoft Lync and Skype for Business. MindLink provides persistent group chat, so users can check back on what was said, and advanced integrations into social media platforms, email, portals and any internal business application through its RESTful API. MindLink also provides users with a large variety of chat-related features, such as real-time universal updates for important projects. MindLink has MDM/ EMM support of Good, Citrix, MobileIron, BlackBerry Secure Workspace and others, as well as data compliance through its compliance connectors to ensure chat conversations meet regulatory requirements.

As the pace of business increases, email alone becomes insufficient, and software must cover the blind spots of existing communication technology. MindLink acts as a fast communication channel, filling in the gaps that email cannot cover. It supports real-time collaboration from any desktop, and also has mobile applications for any type of device, making it a highly flexible solution for Mobile Collaboration.

Enterprises interested in communicating more quickly and efficiently should look at MindLink. Their flexibility makes them a good choice for any enterprise that requires a highly scalable solution. In addition, enterprises that already use Microsoft Lync or Skype for Business should definitely look at MindLink, since MindLink specializes in integration with Lync or Skype for Business.

Strengths

- Secure group chat, used in regulated industries
- Supports Lync/Skype for Business and SharePoint

Challenges

- Lacks voice and video chat support

Promising

Fuze

Fuze is looking to break into the Mobile Collaboration space with its new offering, Fuze Spaces. Using a combination of software from their Fuze visual communication solution with their recent acquisition, LiveMinutes, Fuze Spaces is looking to improve the way teams communicate and collaborate.

Fuze Spaces creates and provides persistent project workspaces for teams to build projects in. Within the space, users can share documents and comment on existing documents. Spaces allows teams to co-edit documents and communicate with voice, video, or messaging. The voice and video uses Fuze, giving users access to HD video and HQ voice. These capabilities bring fuller UCC features to collaborative interactions. Users can also access Google Drive and work on Docs, Sheets, or Slides from within Spaces.

Spaces brings video conferencing and workspace collaboration software together to bring a more unified experience to the user. Enterprises that use Fuze or Google Drive should consider Fuze Spaces because of the special integration Fuze Spaces has with Drive. Also available as a freemium offering, Spaces reduces the barrier to entry for enterprise users to try it out.

Strengths

- Integrations with Google Apps, Box and Okta for single sign-on
- Full web and video conferencing capabilities
- Project collaboration

Challenges

- Early out of beta
- Awareness

Glip (acquired by RingCentral)

Glip, which has been acquired by RingCentral, is positioning itself as a modern business messaging app that tightly integrates all essential productivity tools in the natural context of how work is done: within conversations. It runs in the Cloud and empowers teams to meet and collaborate from wherever they are, using desktops, tablets or smartphones. Teams can text and video chat, manage projects, schedule meetings and share files, all in the context of an ongoing conversation. Glip can support up to 100 video conferencing participants, more than most teams would ever need, and those conferences can be recorded and saved in the app. Glip has platform integrations with numerous third-party apps that allow users to connect disparate communication services into a cohesive conversation, which results in richer context, easier communication and better decisions. There are also email and calendar integrations with full scheduling capabilities and task assignment with other team members.

Previously, the first 10,000 messages in conversations with Glip were free, with $5 and $10/team member pricing tiers allowing 5GB and 10GB of storage, respectively. The limits on number of posts, file storage and integrations have been removed to make Glip more of a freemium offering. Guest users can be added for free. These prices reflect a changing market dynamic and downward price pressure for traditional UC vendors.

Enterprises that use a variety of communications providers for different services should look at Glip because of its ability to unify third-party communications.

Strengths

- Mobile First app
- Google Drive integration
- Price

Challenges

- Recent acquisition, so potential integration challenges with RingCentral

Moxtra

Moxtra is a newer Mobile Collaboration company focused on providing a multilayered collaboration Cloud for embedding into existing legacy applications or new mobile apps. They also provide a standalone app that is offered as a white-label companion to extend the collaboration capabilities to the enterprise beyond the embeddable Cloud collaboration service. The Moxtra collaboration service (and the companion app) is designed around workspaces, referred to as binders, which include the conversational messaging stream, a document collaboration layer, a task management layer and a real time conferencing layer. Each workspace binder features a conversational messaging stream with collaboration tools. Moxtra provides an annotation tool that allows users to add voice notes to any project document. Users can also record what they want to say and attach it to the relevant document within the binder.

While Moxtra is heavily focused on the mobile part of Mobile Collaboration, it also offers both a web app and a desktop application for users who work cross-platform during the day. The Moxtra Cloud collaboration service supports seamless movement between desktop and mobile. Also, workspaces and binders will be in sync to always have the most up-to-date versions of the message stream, documents and other project-related items, such as to-dos and schedules. Moxtra supports several popular third party service integrations, such as HubSpot, GitHub, Google, Drive, and Zendesk, and allows developers to extend capabilities via APIs and SDKs.

Enterprises that require Mobile Collaboration capabilities integrated into business applications should look at the Moxtra platform.

Strengths

- Freemium availability
- PaaS approach to Mobile Collaboration to extend capabilities
- Third party integrations
- Real-time audio and video conferencing

Challenges

- Awareness

Quip

The Quip suite gives enterprises a host of valuable collaboration tools, including chat, checklists and live document sharing. When using Quip, everyone works on the same document, and sees all the changes in real-time as the document is edited. Quip also provides shared spreadsheets, and allows users to share information between these spreadsheets.

Quip is mobile-ready, with applications for iOS and Android. All data is accessible on Quip mobile devices, providing enterprises with the mobility businesses need today. They also provide a shared to-do list, so everyone on the team is updated when something gets done. Quip provides online and offline functionality, giving users access to documents and spreadsheets whether on or offline.

Enterprises that rely on real-time collaboration should look at Quip because multiple users can work on the same document. Enterprises that are data heavy and looking for ways to ease their use of datasheets should also look at Quip because of its shared datasheets, as that data can be shared across different spreadsheets.

Strengths

- Gmail integration
- Document collaboration

Challenges

- Users report user interface is not intuitive

Aragon Advisory

- Evaluate Mobile Collaboration products on their ability to integrate with business applications, workflows and processes
- Focus Mobile Collaboration investments on specific business outcomes
- Establish a team that includes members from IT and the business when making decisions on Mobile Collaboration investments

Bottom Line

Mobile Collaboration is an outcome of technology application design focused on mobile devices and people. This emerging market is expanding rapidly to include both asynchronous and synchronous collaboration capabilities such as web and video conferencing.