Trends in Social Software and the Gartner 2010 Externally Facing Social Software Magic Quadrant

Jeffrey Mann
18 August, 2010
Welcome!

Thank you for joining this Gartner webinar. Today's topic is "Trends in Social Software and the Gartner 2010 Externally Facing Social Software Magic Quadrant "

- 60,000 Clients
- 10,800 Client Enterprises
- 5,500 Benchmarks
- 65% of Fortune 1000
- 80% of Global 500
- 55 Conferences
- 3,800 CIOs
- 10,000 Media Inquiries
- 100,000 IT End-User Inquiries
- 2.7 Million IT End-User Searches
- 730 Analysts Serving Clients in 80 Countries
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Trends in Social Software and the Gartner 2010 Externally Facing Social Software Magic Quadrant

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Few enterprises offer much support for collaboration between the extremes of e-mail and structured collaboration.

This leads to over reliance on e-mail.

New social software possibilities are filling the gap.
So many perspectives on social software...

- Connecting with others
- Cutting down on email!
- Stimulating knowledge sharing
- Engaging with customers or partners
- Staying ‘on the same page’
- Finding people who know
- Reflecting group sentiment
- Discovering relevant information
Are Consumer and Enterprise Needs Really So Different?

Consumers want to:
- Keep informed of what friends are doing and thinking
- Easily tap into their opinions and advice
- Mobilize them for events and causes
- Control what others can see and know about me
- Tailor the platform with extensions and applications
- Tag videos and postings that other people should see, filtering out the noise
- Know which sources and Web sites friends use

Business users want to:
- Keep informed of what colleagues are doing and thinking
- Easily tap into their opinions and advice
- Mobilize them for events and projects
- Control what others can see and know about me
- Tailor the platform with extensions and applications
- Tag documents and postings that other people should see, filtering out the noise
- Know which sources and Web sites colleagues use
What’s Next for Collaboration

H1 2010
- Consolidation and upgrades
- Prove value
- Social Software emerges
- Knee jerk rejection mostly gone

H2 2010
- High awareness of new possibilities
- Innovate to recovery with low costs
- Gap between small projects and enterprise-wide deployments
- Lingering doubts about business applicability

2011
- Capitalize on innovation by scaling up
- Consolidation of UCC and social SW
- Management of social software gains higher priority

2012

Pioneers

Settlers
## Select the Right Tool for the Job

<table>
<thead>
<tr>
<th>Tool</th>
<th>What it is</th>
<th>What to use it for</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Blogs</strong></td>
<td>Personal channel to expose ideas and get comments in sequential posts</td>
<td>Executive communications, project status, thought leadership</td>
</tr>
<tr>
<td><strong>Wikis</strong></td>
<td>Collective authoring on a single, growing document</td>
<td>Reaching consensus, brainstorming</td>
</tr>
<tr>
<td><strong>Content repositories</strong></td>
<td>Controlled access to downloadable files</td>
<td>Controlled progress toward versioned deliverables</td>
</tr>
<tr>
<td><strong>Community spaces</strong></td>
<td>Mechanisms for organizing, understanding and filtering group activities</td>
<td>Group member communication and interaction</td>
</tr>
<tr>
<td><strong>Social tagging</strong></td>
<td>Share/analyze links to useful sites, documents, objects</td>
<td>Organizing &amp; sharing resources, discovering trends and expertise</td>
</tr>
<tr>
<td><strong>Profiles</strong></td>
<td>Descriptions of interests, skills, projects, experiences</td>
<td>Building personal links, expertise location</td>
</tr>
<tr>
<td><strong>Social analytics</strong></td>
<td>Tools for collection and reporting of social signals</td>
<td>Helping users navigate, explore, find people and information</td>
</tr>
</tbody>
</table>
Top Business Benefits

- Communication: 71%
- Learning: 57%
- Teamwork: 53%
- Creativity: 53%
- Problem Solving: 46%
- Relating: 42%
- Leadership: 37%
- Decision Making: 34%
- Supervision: 33%
- None of the Above: 2%
- Don’t Know: 3%

N = 817
Multiple responses allowed

Source: Gartner Social Media Survey, September 2009

Useful, but too general for measurable ROI.
Social Software Market Segmentation

Social Software in the Workplace
(your people, your place)

Data, user experience and governance controlled by the enterprise; private; white-label

Assisting with: connecting, marketing, selling, servicing, crowdsourcing, recruiting, training, producing, communicating

Externally Facing Social Software ('White-label')
(your people, other people, your place)

Awareness
Communispace
Crowd Factory
Flux
IntroNetworks
Kickapps
Lithium
LiveWorld
Neighborhood America
ONEsite
Pluck
Sparta Social Networks
ThePort Network
...
Externally Facing Social Software
Definition and Criteria

Externally facing social software (EFSS) supports external teaming, communities and networking where most participants are outside the enterprise (for example, customers, affiliates, alumni, developers, members, contractors, partners, trainees and resellers).

- Minimum functionality includes:
  - Moderation: Capabilities or services to manage and control large numbers of comments and postings.
  - Social profiles: Information about each user accessible by other users.
  - Roles and access control: Support for multiple roles (for example, editor, facilitator, community manager and moderator) with associated access controls.
  - Discussion forums: Support for a persistent, moderated environment in which to post questions and answers or to have general discussions.
  - Blogs: Instant publishing functions for users that display entries in reverse chronological order and permit comments from others.
  - User management: Ability to create, modify or retire user accounts and to manage anonymous or "guest" users.
(From "Magic Quadrant for Externally Facing Social Software," 05 July 2010)
Social CRM applications are used by sales, marketing and customer service employees to engage customers along a buying/interaction process.

Social CRM providers must meet the following minimum requirements:

- The primary use of the application is to support collaboration internally between sales, marketing and customer service and with customers/prospects outside the organization.

Minimum functionality will include the following:

- Capability to directly support one or more sales, marketing and service practices (e.g., campaign management, sales force support and call center feedback)
- Must have a measurable business use case, KPIs and process workflow for engaging with customers in a buying process (e.g., lead to sale process) of a product or service, as well as strong customer motivation for participating

Other functionality may include the following:

- Partner support for sales, marketing and customer service
- Customer analytics, reporting, and structured and unstructured data mining capability
- Offer management capability and/or the ability to make offers within a social application
- Ability to incorporate findings or solutions into CRM operations, such as a customer service knowledge base, multichannel campaign management tool or a sales application
Magic Quadrant For Social CRM

As of June 2010

- Jive Software
- Lithium
- Mzinga
- salesforce.com
- KickApps
- Oracle CRM On Demand
- Globalpark
- Bazaarvoice
- Nielsen BuzzMetrics
- RightNow
- Vovici
- Radian6
- Demand Media
- LiveWorld
- Visible Technologies
- Thomson Reuters-Hubbard One
- Leverage Software
- InsideView
- Overtone
- Nielsent BuzzMetrics
- Demand Media
- KickApps
- Oracle CRM On Demand
- Globalpark
- Bazaarvoice
- Nielsen BuzzMetrics
- RightNow
- Vovici
- Radian6
- Demand Media
- LiveWorld
- Visible Technologies
- Thomson Reuters-Hubbard One
- Leverage Software
- InsideView
- Overtone

- Leaders
- Visionaries
- Niche Players
- Challengers
Magic Quadrant For Social Software In The Workplace

- challengers
  - Open Text
  - Atlassian
  - MindTouch
  - TOMOYE
  - EMC
  - Ektron
- leaders
  - Google
  - Drupal
  - Telligent
  - Socialtext
  - Novell
  - blueKiwi Software
  - Leverage Software
  - Huddle
  - Traction Software
  - CubeTree
- visionaries
  - IBM
  - Microsoft
  - Jive Software
- niche players
  - TWiki
  - Fatwire
  - Central Desktop
  - SITEFORUM
  - EPiServer
  - IGLOO
  - BlueKiwi Software
  - Neighborhood America
  - ThoughtFarmer
  - Blogtronix
  - ThoughtFarmer
  - eTouch Systems
  - PBworks
  - Realcom-US
  - CustomerVision

As of October 2009

(From "Magic Quadrant for Social Software in the Workplace," 22 October 2009)
Social Improvements in SharePoint 2010

- Social computing, content management, and search work better together
- Wiki actually behaves like a wiki
- Basic social computing tools are “good enough” to challenge tactical vendors
- Mines Outlook/Exchange for knowledge
- New APIs to customize and extend functions

Be wary of: best of breed status, 3-year release cycle, Microsoft lock-in, missing SNA and policy controls, plus cloud-prem inconsistency
KLM For the latest update on flight disruptions to and from Ireland, please see info at http://bit.ly/aYzs6b

4 hours ago · Comment · Like

KLM For the codeshare partner Aer Lingus confirms cancelling flights to and from Ireland this morning. Please see http://j.mp/bt1j6C for disruption info. For your flight status check: http://bit.ly/cOeQfo.

5 hours ago · Comment · Like
Case Study: T-Mobile Makes Connections

• **Challenge**
  - Information-sharing issues among frontline sales

• **Approach**
  - Created a virtual environment in which day-to-day experiences could be captured and shared
  - Set up a three-month pilot with targets for activity and usage

• **Results**
  - Profiles increased the ease of finding colleagues
  - Groups formed around specific topics
  - Increased engagement and diffusion of best practices had a positive impact on sales performance

• **Critical Success Factors**
  - Establish clear goals for the pilot and measures for determining whether they have been achieved
  - Test the hypothesis in low-risk, quick-to-set-up pilot

• **Lessons Learned**
  - Making it possible for employees to help each other "pull" needed information is more effective than "pushing" it out
Your Action Plan

CIOs and collaboration managers should …

• **Monday Morning**
  - *Observe* how social software (whether official or not) is used in the organization.

• **Your Next 90 Days**
  - *Inventory* collaboration tools and social software already in use
  - *Identify* pilots and initial projects which will provide real value
  - *Evaluate* vendor strategies and provisioning models

• **Your Next 12 Months**
  - *Extend* existing portfolio products to encompass new social software capabilities
  - *Encourage* employees to embrace and extend social software
Related Gartner Research

- Magic Quadrant for Externally Facing Social Software *Jeffrey Mann et al* (G00201627)

- Magic Quadrant for Social CRM *Adam Sarner et al* (G00201531)

- Predicts 2010: Social Software Is an Enterprise Reality *David Smith* (G00172259)

- The Business Impact of Social Computing: Real-World Examples of Collaboration in Employee Networks *Nikos Drakos* (G00172251)
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