
The Aragon Research Globe™ for Mobile Collaboration, 2018

Messaging for Work Becomes an Imperative

25 May 2018 | Research Note 2018-19

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Topic: Collaboration

Issue: Who are the Collaboration providers and how will they evolve?

Summary

Mobile Collaboration is poised to take off in the enterprise. While Messaging has been popular in the consumer space for over 10 years, it is now becoming part of the new way to work. Aragon's Globe for Mobile Collaboration for 2018 evaluates 19 major providers. Messaging is positioned to become a major point in the work environment and will be key to increased levels of human to human and human to machine interactions.

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Introduction

Mobile Collaboration is poised to become a larger part of the Digital Workplace landscape, offering broad appeal and providing increasing levels of machine integration. As Messaging becomes more vital in day-to-day work, Mobile Collaboration has become a de facto part of a broader Collaboration and Communications offering. This research note focuses on productivity and Automation, which are led by Mobile Collaboration.

Messaging, the core of Mobile Collaboration, is slowly becoming a priority in the enterprise. Today, enabling [Collaboration](#) via Mobile technology is not enough; Collaboration also needs to be secure and shift towards Automation (via Chatbots). In this research note, we discuss the current and future states of the Mobile Collaboration market and evaluate 19 major providers.

Mobile Collaboration: Messaging and Speed Are Key

Mobile Collaboration is no longer an optional tool for knowledge workers; it is becoming an essential. Providers have been quick to note this and respond. In 2018, providers are making their Mobile Collaboration offerings the lead story. While consumer SMS continues to dominate, the need for secure Messaging is fueling a race to get deployment under control.

While consumer tools such as Facebook (WhatsApp and Messenger), Snapchat, and WeChat are still popular, enterprises are realizing that there is a growing demand for more. Apple is in the midst of rolling out business Messaging this year, as they seek to become more enterprise-focused. Microsoft has also made a big push in recent years with Microsoft Teams, which has been gaining significant traction.

Security and Privacy is Front and Center

With more regulation—such as GDPR—looming on the horizon, the demand for secure Messaging capabilities is just as great as enterprise demand for user identity protection. Most providers in this report are enterprise-focused, and should be included in an evaluation list, unlike consumer-grade tools.

Shift to the Enterprise: Messaging Speeds up Customer Journeys

Aragon has observed over the past year that buyers want to be able to communicate quickly for conducting a transaction. At the same time, managers need to be able to take action with their team. Messaging enables both aspects of Customer Journeys and promotes more efficient experiences.

This is particularly true for Mobile workers who need to be able to accept tasks and provide progress updates, and for parties involved in business transactions where an agreement must be reached. In some cases, a company-wide Message can be shared faster via Message than Email because people tend to be more responsive to phone notifications.

Mobile Collaboration is at the heart of a simpler and a faster journey for all of these examples. This is one of the reasons that Aragon sees Mobile Collaboration growing even faster as a category: when Communication is expedited, work can be accomplished faster.

Email Becomes a Legacy Modality in the Race to Faster Outcomes

With the focus on outcomes, Email is becoming more of a notification service and is no longer equipped to handle the immediate needs of the enterprise. Mobile Messaging has become the most direct way to reach someone and has large enterprise implications. The reality is that 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.

***Prediction:** By YE 2021, Mobile Collaboration will overtake Email as the way that knowledge workers collaborate with each other.*

People-Centric Collaboration: Making it all Seamless

Aragon feels that there is a need to put people at the center of UCC, which is more about People-Centric Collaboration than channel-specific UCC. Use cases will help to drive this, as will the addition of intelligence using predictive and prescriptive analytics. There are many business use cases for UCC because of the increased demand for omni-channel forms of Communication. For example, sales reps know that today's customers are busy, and trying to schedule a sales appointment has become much harder.

Customers might not have time to look over every Email or return a missed phone call, and they may not want to, either. When it comes to outreach, the efforts made must be omni-channel and take into account the technology that customers increasingly want to use, such as Messaging and Video. Phone calling and Emailing are only part of the Communications equation. A UCC platform will provide different areas of the business with multiple forms of outreach capabilities in order to successfully compete in today's digital world.

At its core, People-Centric Collaboration is about enabling seamless Communications and Collaboration. It allows for calls that are both Voice-based and Video-based; it enables meetings with users and rooms; it is about the shift from Instant Messaging to Mobile Messaging, which we have termed Mobile Collaboration. However, not all have been quick to recognize these changes in the market, particularly the impact of Mobile Messaging.

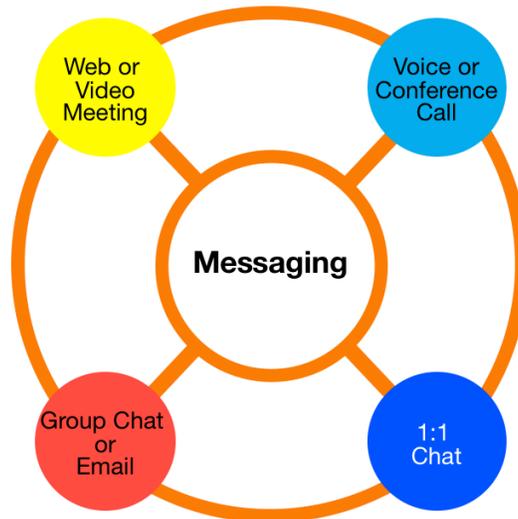


Figure 1: People-Centric Collaboration means being able to seamlessly switch to the right method of interacting with others.

Chatbots Come Online

Chatbots, which need to mature to become full Digital Assistants, are becoming more of the norm. Most major providers have a Chatbot engine, and we expect others to partner with or acquire Chatbot capabilities in 2018. One mistake many buyers and vendors make when it comes to utilizing a Chatbot is that they don't understand that it is a window into an application.

The vision for People-Centric Collaboration is to have a Communications Digital Assistant (i.e. an AI Chatbot) with the ability to perform calls, schedule and launch meetings, and make adjustments for any encountered errors.

The Digital Assistant is simply a way of communicating with humans and other applications to schedule or begin a call, start recording, or perform other commands. AI-based Chatbots will be able to accomplish more tasks for people in the quest to make Collaboration and Communications more seamless. Aragon feels that by YE 2021, 40% of UCC providers will offer an AI-based Digital Assistant to automate Collaboration and Communication engagement and make it more seamless.

Prediction: By YE 2021, 40% of UCC providers will offer an AI-based Digital Assistant to enable a more seamless Collaboration experience.

Most of the providers in Mobile Collaboration either have a Chatbot offering or integrate with other Chatbot providers.

Team, Enterprise, and Work Processes

We see Mobile Collaboration being adopted by teams and entire enterprises. Some enterprises are using Mobile Collaboration Apps to simplify company-wide Messaging, either for company updates or, more importantly, for emergency notifications. Notifications have become important in university settings and are now becoming a priority in the enterprise. However, Mobile Collaboration often still starts with a specific team that decides to implement Mobile Collaboration at work. For example, we see marketing teams using Mobile Collaboration for events to coordinate and communicate with both the internal and extended teams involved.

In 2018, more firms are offering Mobile Collaboration as part of their UCC or Digital Work Hub platform. Cisco, Google, LogMeIn, Microsoft, and Unify all offer a full Mobile Collaboration platform as part of their work platforms. Work platforms may be UCC-centric or they may be full Digital Work Hubs where Messaging is front and center. It's clear that Mobile devices are here to stay, and the immediacy of Mobile Chat has been recognized.

The second focus is on the Mobile worker, where phones or tablets are the primary (or only) devices being used. Task Management, advanced document Collaboration, and integration with other mission critical applications, such as CRM or a Service platform, become critical to the work process.

Moreover, 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 to extend and embed capabilities into business applications.

Characteristics of Mobile Collaboration Platforms

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 2*):

Interaction Modes

- Messaging: Text Chat/IM
- Voice and Video calling
- Persistent Group Chat
- Web and Video conferencing
- File sharing and document Collaboration
- Chatbots

Infrastructure Elements

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

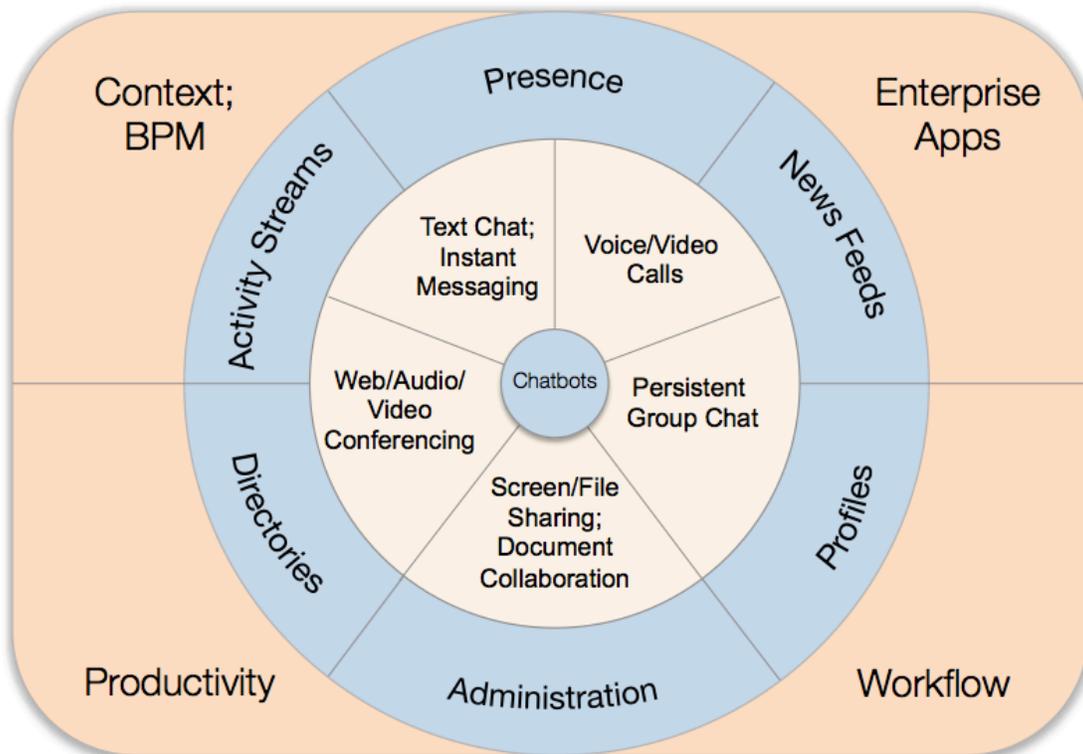


Figure 2: Elements of Mobile Collaboration (Center: Interaction Modes; Middle ring: Collaboration Infrastructure; Outer box: Enterprise Ecosystem.

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-premise UC or UCC tools and requires updated administration and security tools. Conversely, Mobile Collaboration products have to integrate with enterprise directory services, including full LDAP and active directory.

Security Front and Center

Security within and between applications, Content, and Messaging is becoming critical. More providers, such as Cisco and Zinc, offer full encryption. Google has upped the ante with its use of two-factor authentication via Messaging for verifying a user's identity when their account may have been hacked.

Aragon feels that Message and Content encryption will become more critical as Enterprise Messaging becomes deployed in larger numbers and as new regulations, such as GDPR, begin to require higher levels of security around sensitive information such as identity-related data.

Pricing

Most Mobile Collaboration providers are now focusing on a two-tiered price model with a free entry level, like consumer tools, and a high-end enterprise tier that includes security, administration, and other back-end features. 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 increases.

Structured Collaboration and Tasks

Beyond the Collaboration ecosystem itself is the outer layer of integration shown in *Figure 2*. This layer includes the contextualization of collaborative interactions as workflow events in specific business processes. Aragon calls this *Structured Collaboration or Tasks*, and it is key to reducing waste and increasing the productivity of collaborative activities.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance, but with limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

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

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.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international* or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East, and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide

- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators*, or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

The Aragon Research Globe for Mobile Collaboration, 2018 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 Globe 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 under current or previous brand name.
- **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.

Vendors Inclusions

New vendors this year include:

- **IBM**
- **LogMeIn**
- **Microsoft**
- **Mitel**
- **TigerConnect**

Vendors excluded:

- **Broadsoft** – *Broadsoft was acquired by Cisco in February 2018.*

The Aragon Research Globe™ for Mobile Collaboration, 2018

(As of May 25, 2018)



Figure 3: The Aragon Research Globe for Mobile Collaboration, 2018.

Leaders

Cisco

Cisco re-launched Spark as Cisco Webex Teams in April 2018. Cisco is refocusing all of its Collaboration efforts around Webex for meetings, calls, and Team Collaboration. Webex Teams interoperates with most of Cisco's UCC offerings, making it an app-centric, Cloud-based service that provides a complete Collaboration suite for teams to create, meet, Message, call, share, and whiteboard. Webex Meetings enhancements enable video-centric and more powerful Mobile experiences. Webex Teams will also be more fully integrated into the Webex platform.

In 2017, Cisco acquired advanced conversational AI platform provider MindMeld, as well as Accompany in 2018, and those capabilities are being integrated into the Webex Assistant. Cisco also makes it easy to create customized Chatbots by leveraging the Webex Teams API. Mobile devices are more automatically connected with Cisco Endpoints. One of the significant capabilities that Webex Teams offers is end-to-end encryption so all Messages and files, including user and IT-level controls, are encrypted at rest and in transit and in-use. Cisco also offers integrations with a number of major providers including Apple, Box, Dropbox, DocuSign, and Salesforce.

Strengths

- Chatbot support
- Mobile Apps
- Ease of use
- Escalation from Chat-to-Voice and Video meetings
- App Store, including options for free downloads
- Hybrid UC call support
- Enterprise security compliance
- Flexible Licensing

Challenges

- Overlap with Cisco Jabber

Google

Google Hangouts Chat is part of Google's flagship G Suite. Hangouts offers intuitive Mobile Messaging capabilities via web interface and via standalone Messaging Apps for iOS and Android. Hangouts offers full Messaging, IM, Presence, Voice, and HD Video calling capabilities integrated with Gmail.

Google has continued to refine its Google Hangouts platform that was refocused in 2017 with Hangouts Meet for Voice and Video and Hangouts Chat. Chat is focused on the growing Mobile Collaboration between teams and is tightly integrated and packaged with its flagship Cloud office offering, G Suite. Both Hangouts Chat and Hangouts Meet scale well and run on Mobile and desktop devices. Additionally, the Google Hangouts Chat platform offers full integration with other Google Apps like Google Drive, Gmail, and Calendar, allowing users to launch straight into a full Video or Voice call. Integration with Gmail ensures that Google enterprise users now have a full range of Collaboration capabilities, from asynchronous to real-time. Google also supports the development of full AI-based Chatbots in Hangouts via its API and its Chatbot Development Engine Dialogflow.

Strengths

- Ease of use
- Integrations
- Security
- Chatbot support
- Integration with G Suite

Challenges

- Balancing focus on Hangouts Chat vs G Suite

Microsoft

Microsoft shipped Microsoft Teams in Q1 2017 and it is now the lead brand for its UCC offering, leveraging all Skype for Business functionality and delivering it in a modern desktop and Mobile UX interface with full support for Mobile Messaging. Clients can run either Teams Client or SfB clients for now. For on-premise, Skype for Business continues with its new release, coming in the second half of 2018. The push in the enterprise is for bundles that Microsoft offers (Teams with Office 365). While E3 provides basic Collaboration, Messaging, and Video meetings, the E5 suite makes it a full Cloud Based Phone System.

Microsoft Teams is positioned to become the hub for teamwork for Office 365, even though Outlook Email clients currently dominate. Teams features a full Chatbot framework, which will allow enterprises to build Chatbots and full Digital Assistants to automate work tasks. When fully enabled, Microsoft Teams will be a full Cloud PBX. The Skype for Business ecosystem is huge, with Microsoft enabling group Video from nearly any device. Microsoft has a growing partner ecosystem to deliver additional services for Voice and Video that are tightly coupled with Skype for Business. Microsoft Teams also comes out of the box with a support Chatbot that offers its own Chatbot platform called Microsoft Azure Bot Service.

Strengths

- Office 365 integration
- Multimodal project and team-centric Collaboration
- Third-party integrations
- Chatbot support
- Security
- On-premise deployment option

Challenges

- Users report admin functions aren't very intuitive

Slack

Slack, based in San Francisco, is making a strong push in enterprise appeal with the Slack Enterprise Grid, which was announced in January 2017. The successful pivot to the enterprise led to a US \$250 million round in September 2017 that was led by SoftBank. Slack Enterprise Grid adds advanced security and administrative features, supports desktop and Mobile platforms, and includes rich Collaboration and productivity capabilities. Slack features Slack Channels and a growing ecosystem of Chatbots that support a growing number of use cases for Mobile workers. Slack's robust API framework has enabled a growing partner ecosystem of over 1500 partners in the Slack app directory including Concur, Google, Workday, SAP, Salesforce, ServiceNow, and others.

While Slack supports Chat, Voice, and Video calls, most of its focus has been on driving productivity gains by integrating workflows through applications or custom integrations. Slack offers strong Message editing features and the ability to conduct polls. It also has become GDPR compliant and added new features that allow enterprises to export all conversations, including private direct Messages. Enterprise Grid positions Slack well for the future as enterprises are searching for more ways to streamline and accelerate work output. Slack's strong level of investment and continued innovation positions it well for the future.

Strengths

- Team-oriented
- Document sharing
- Slack channels
- Chatbot support
- App integration (App Store)

Challenges

- Balancing consumer and enterprise needs

RingCentral

RingCentral Glip is a full Mobile Collaboration offering that integrates with the full RingCentral UCC platform, RingCentral Office, as well as RingCentral Meetings and RingCentral's Collaborative Contact Center solution. Glip enables users both within and outside the enterprise to send Messages, share files, assign work, track deadlines, schedule Video meetings, and make calls. Glip also makes it easy for external users to join the conversation by conveniently joining Glip as guests. RingCentral Glip can be used on a desktop or Mobile device and is available for both iOS and Android devices.

In 2017, RingCentral introduced its Rest API that will allow enterprises to develop their own Chatbot or to integrate Glip with existing Chatbots. RingCentral Glip enables workers to manage their projects on the go through calendar integration, as well as task assignment, file sharing, and Messaging and Collaboration across teams. Glip also supports shared files and has integrations with Box, Google Drive, Dropbox, ZenDesk, and others. RingCentral allows enterprises to get started for free and also offers a standard plan starting at \$5 a month. RingCentral Glip can serve the Enterprise as a digital communications hub, which increases overall workforce productivity.

Strengths

- Mobile-first app
- Freemium support
- Third-party app integration
- Voice and Video support
- Task management
- Corporate active directory sync

Challenges

- Balancing focus on UCaaS vs Messaging

Unify

Unify, a subsidiary of Atos, has continued to innovate its Circuit Mobile Collaboration product, which is a key component of the Atos Digital Workplace offering. Unify was one of the first to drive the team Collaboration market with a commercial WebRTC solution when Circuit was announced in 2014. Unify has opened up its portfolio to all forms of Cloud deployment, and its OpenScape UCC platform leverages Circuit as a key component. Circuit brings teams together by giving them a consistent experience regardless of the device, and persistent space for Collaboration. It enables file and screen sharing, storage, Chat and Messaging, Audio and Video Calling, and PSTN connectivity wherein all modes can be recorded in to a single portable mp4 file. Circuit provides telephony connectors for both Unify and third-party SIP communications platforms to protect existing customer investments.

In 2018, Unify added enhanced analytics capabilities to Circuit that provide details on call and Message activities. Unify has also doubled down on a use case focus that leverages the Circuit CPaaS capabilities and partner solutions, particularly for Chatbot requirements. Unify continues to expand the distribution for its Cloud offerings, which now includes Deutsche Telekom, ScanSource, and NTS Direct, among others. Desktop Apps are available for Windows and Mac, and Mobile Apps for iOS and Android devices or Circuit can be used via WebRTC compatible browsers. Circuit provides integrations with numerous third-party applications and is extended by API through REST, JavaScript, Node, and iOS SDKs.

Strengths

- Enterprise and carrier-grade scalability
- OpenScape and Circuit integration
- Voice and telephony integration
- Global partnerships

Challenges

- Awareness outside of Unify customer base

Contenders

Atlassian

Atlassian replaced its aging HipChat offering in September 2017 with a newly branded product called Stride. Stride has a modern look and feel and supports Mobile and desktop users. It also supports Video and Audio calls, screen sharing in meetings, and file sharing. Atlassian has doubled down on Chatbots, with both a Chatbot Framework and 45 pre-developed Chatbots that can be automatically added to HipChat. Atlassian offers a migration framework for HipChat Apps to be migrated to Stride.

One of the significant capabilities that Atlassian offers with Stride is access to the full Stride API platform, which was released in early 2018. Stride allows users to focus on work when deadlines are approaching by muting all conversations. Stride represents a refreshed focus on Mobile Collaboration at an aggressive price.

Strengths

- Multimodal project and team-centric Collaboration
- Integrations
- Chatbot support
- On-premises deployment option

Challenges

- Awareness of new product offering

LogMeIn

LogMeIn, headquartered in Boston, launched a beta of a Messaging feature inside its flagship product, GoToMeeting, in Q1 2018. Instant Messaging on both its desktop and Mobile applications will be a critical component and one of the first pieces of its next-generation product. The company sees Messaging as elemental to its new platform design, which establishes GoToMeeting as the real-time work hub for businesses that want more efficiency and productivity from meetings and interactions both inside and outside the company.

LogMeIn is also focused on breaking into the UCC market with its recently closed acquisition of Jive Communications in early April 2018, adding rich business Voice in the Cloud capabilities to its suite of services. LogMeIn is quickly expanding beyond its reputation as a leader in web meetings to become a provider of broader UCC capabilities, within which Mobile Collaboration will be key.

Strengths

- Web and Video conferencing capabilities for multiple use cases (1:1, team Collaboration, webinars, and big meetings)
- Install base
- Brand awareness
- Ease of use

Challenges

- Chatbot support

Innovators

Amazon

Amazon Chime was launched as an AWS Service in February 2017 and represents Amazon's entry into Mobile Collaboration. Amazon Chime offers online meetings, video conferencing, calls, chat, and content sharing both inside and outside the organizations.

Amazon Chime is available through two partners, CenturyLink and Vonage Business, and works with Alexa for Business. This enables users to use Alexa to start meetings with their voice. Alexa can start video meetings in large conference rooms, and automatically dial into online meetings in smaller huddle rooms and from a user's desk. Amazon also offers Amazon Lex, its Chatbot and Conversational interface platform, which is fully integrated with all AWS Services. Enterprises looking for an affordable and full-featured Mobile Collaboration platform should consider Amazon Chime.

Strengths

- Full UCC features
- Works with Alexa for Business
- Partnerships
- Pricing

Challenges

- Task support

Bolste

Bolste, based in Scottsdale, focuses on Mobile Collaboration in the Digital Work Hub by combining individual and team tasks, document sharing, and Video calls. Bolste recognized the shift to Mobile and offers users the ability to collaborate via Mobile Chat, which is seamlessly integrated into all of its essential functions. Users can keep track of Chats around projects, events, departments, and their daily activity feed, which allows teams to be on the same page with customers and partners.

Bolste has made it easy to get started with a free Mobile App on Apple iTunes and Google Play. For existing enterprises, Bolste also allows guests to join a Bolste Work Group. Bolste has been gaining traction in enterprises and SMBs because of its approach to work and ability to combine many of the necessary individual work and social tools into one offering. All of these capabilities make Bolste a new modern work platform that leverages Mobile technology as a key way to collaborate.

Strengths

- Ease of use
- Task management
- Video support
- Mobile Chat capabilities

Challenges

- Market awareness

Fuze

Fuze, based in Boston, offers Mobile Messaging as part of its UCC platform. Mobile Messaging has seamlessly blended into the overall functionality of Fuze's platform. Fuze has received a total of U.S. \$484.8 million in investments and gained \$150 million in May 2018. Fuze has a complete UCC platform that offers a seamless user experience across all UCC modalities. This focus has allowed Fuze to continue its growth, particularly in medium and large enterprises. Its Cloud-native platform includes Cloud-based Voice, HD Video conferencing, and Messaging, thus providing a seamless experience across both desktop, Mobile, chrome book, and browser-based environments. Fuze is making it easier and faster to collaborate and communicate via an intuitive Mobile user experience that is consistent across desktop and conference room counterparts.

Fuze Collaboration provides asynchronous and real-time Collaboration for teams, enabling users to easily move from persistent Chat-to-Voice and Video within the same application experience. The integrated Voice and Video capabilities give users access to HD Video and HQ Voice. Fuze provides a rich Content Collaboration experience and supports accessibility to internal and external CRM data through optional connectors. These capabilities bring fuller UCC features to collaborative interactions. Finally, the Fuze Data platform powers AI, Automation, and Machine Learning and delivers a unified source of real-time communications data to help enterprise leaders drive strategic business initiatives.

Strengths

- Easy to use with consistent user experience across devices
- Full web and Video conferencing capabilities
- Full UCC features including Voice and telephony
- Integrations with Dropbox, Box, Okta for SSO, and CRM/Ticketing Systems (i.e. Salesforce)

Challenges

- Focus on Messaging

IBM

IBM recently launched Watson Workspace Plus, its new Watson-powered Mobile Collaboration Offering that is focused on Collaboration and people and Automation via features such as conversation and meeting summarization. In March 2018, IBM also added new Video meeting capabilities to round out communication options for users. The meeting summarization capability, called Moments, allows for large volumes of meeting and conversation summary to be condensed down into digestible nuggets. This Digital Work Hub innovation is something we expect others to emulate.

One of the strong features of Watson Workspace is the ability to create new automated Digital Assistants by leveraging the integration with Watson Workspace Services. Since launching Watson Workspace Plus, IBM has rounded out its App integration, and now has the ability to integrate with other tools, like Slack. The combination of Moments' capabilities and new features like Video meetings and App integration positions IBM as a Mobile Collaboration and Digital Work Hub innovator. IBM has a significant market opportunity to upgrade its Sametime and Collaboration user base to Watson Workspace.

Strengths

- AI integration
- Ease of use
- Video and call support
- Focus on financial services
- Third-party integrations
- Real-time Audio and Video conferencing

Challenges

- Overall market awareness

Mitel

Mitel has been focused on consolidation and in 2017 it acquired ShoreTel for \$430 million. Mitel CEO Rich McBee's strategy of growing via acquisition is starting to work. Mitel MiCollab is the lead Messaging App that is part of Mitel's complete UCC Portfolio which, besides Messaging, provides Cloud and on-premises Voice Offerings, Contact Center, and Endpoints. MiCollab offers support for real-time Presence, direct and group, and persistent workspaces for Messaging services on Mobile Devices.

Mitel supports the growing demand for Mobile Workers via Mitel Dynamic Extension, which enables associates and external users to quickly communicate with each other using single number reach and corporate identity. Mitel MiCollab also makes it easy to launch a standard or Video call from Android or iOS-based Mobile Devices and allows for the participation in Collaboration sessions while Mobile. Going forward, Mitel will offer more Chatbot options outside of its Contact Center application.

Strengths

- UCC platform
- Internal and External use cases
- Real-time Audio and Video conferencing

Challenges

- Chatbot support

Moxtra

Moxtra, based in Cupertino, has begun to leverage its Mobile Collaboration platform to focus on work-related use cases, including financial services. Moxtra offers a full set of capabilities, including Voice and Video calls, Messaging, and document sharing. Part of the reason for its growing success is its secure Message center capabilities, which enable external enterprise Collaboration with customers and partners. The Moxtra platform has become a Mobile Digital Work Hub, in part because of its workspaces that include the conversational Messaging stream, a document Collaboration layer, a Task Management layer, and a real-time conferencing layer, all enabled by its API layer.

Moxtra's focus on financial services applications is starting to produce a growing number of customer wins. The Moxtra Cloud Collaboration service enables easy movement between desktop and Mobile. Conversations with Moxtra's customizable Chatbots seamlessly escalate to live, collaborative interactions. 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.

Strengths

- Freemium availability
- PaaS approach to Mobile Collaboration to extend capabilities
- Focus on financial services
- Third-party integrations
- Real-time Audio and Video conferencing

Challenges

- Overall market awareness

Samepage

Samepage, based in Campbell, offers a Mobile Collaboration platform that focuses on Collaboration and documents. In 2017, Samepage added support for Video calls that provides an enhanced way for remote teams to meet and collaborate. Samepage is easy to use and provides a seamless and intuitive way to work in a team environment via Messaging and document interfaces.

Samepage is Mobile-ready, with applications for iOS and Android. One of Samepage's powerful capabilities is its ability to create documents that are easy to share internally and externally, like a webpage, but without the need for a dedicated website. Samepage offers built-in Task Management, making it ideal to use either for team or customer-focused projects.

Strengths

- Ease of use
- Team-oriented
- Live document Collaboration
- Task Management
- External sharing use case
- Integrations
- Chatbots

Challenges

- Market awareness

Zinc

Zinc, led by CEO Stacey Epstein, is winning clients due to its focus on Mobile work industries, such as Field Service, Healthcare, and Hospitality. GE Invested \$11 million in Zinc in 2017 and this has enabled new partnerships with Field Service providers, including GE's own ServiceMax. In 2017, Zinc added push-to-talk functionality, which can significantly speed up Communications for Mobile workers on the go.

In April 2018, Zinc launched a new partnership with ServiceMax that pairs Zinc Mobile Communications with Predix ServiceMax to offer technicians real-time conversations with others. Built-in encryption capabilities, which Zinc now offers, are becoming a must-have in the enterprise. Finally, broadcast capabilities enable widespread notifications when a critical event occurs. Zinc's intuitive and easy to use interface is one reason for Zinc's success. Zinc also supports Chatbots and has some compelling use cases for service. The total focus on the Mobile worker makes Zinc a Mobile Work Hub that is ideal for people on the go.

Strengths

- Focus on Mobile worker use case
- Ease of use
- Push-to-talk functionality
- Encryption
- HIPAA compliance

Challenges

- Market awareness outside of US

Specialist

Brazen

Brazen focuses on Mobile Collaboration for talent acquisition and career development. Brazen's Chat communication software is helping employers convert candidates to hires at twice the standard rate by offering them the option to chat with recruiters at the very moment they make a decision whether to apply or leave. Additionally, Chat communication is speeding up the recruiting process. With a focus on engaging top talent in meaningful conversations earlier in the recruiting process, Brazen's offering also reduces the cost per hire and significantly improves the candidate experience.

Brazen's Chat communication platform provides its clients with a breadth of features and benefits. The built-in analytics dashboard allows recruiters to measure the effectiveness of their campaigns. The SmartQueue feature matches recruiters with only the most qualified candidates, thereby saving them time and speeding up the hiring process. Lastly, the landing pages, registration forms and Chat transcripts give recruiters insights into candidates to help them move only the best candidates through their hiring funnel. As Chat continues to be the preferred Communication channel, Brazen is positioned to upend the talent acquisition and career development markets.

Strengths

- Attracting top talent
- Human-to-human communication
- Engage quickly with top talent
- Multi-Chat
- Integrations
- Compliance
- Analytics and dashboards
- Recruiting use case
- University events use case

Challenges

- Support for Video Chat and conference calls

Lua

Lua, based in New York City, focuses on Mobile Collaboration for Healthcare. Lua provides secure, HIPAA compliant, targeted access to doctors, nurses, and providers by bringing Content into collaborative interactions to provide context to ongoing processes and workflows. Lua users can also leverage external Messaging, which allows secure, HIPAA compliant Messages to be sent to people outside of a network, such as patients and their families. Lua also offers Video Chat, allowing providers to easily escalate a Message into a Video call with both colleagues and patients.

In addition to existing partnerships with VMware AirWatch and Citrix, Lua has also integrated with Box and Salesforce. In Healthcare, integrations with EPIC, Cerner, and more are helping Lua gain a foothold in hospitals and clinics. Lua's Insights dashboard provides analytics on cross-departmental interactions to help improve effectiveness and drive business decision-making.

Strengths

- Telehealth Video chat
- Secure external Messaging and Video
- HIPAA compliance
- Search
- Analytics dashboard
- Active directory integration

Challenges

- Lacks support for tasks

TigerConnect

TigerConnect, formerly known as TigerText, based in Irvine California, focuses exclusively on Mobile Collaboration for Healthcare. TigerConnect has expanded its portfolio over the last year to include more integrations with Healthcare ecosystem, including Electronic Health Record (EHR) applications, including Cerner, EPIC, and Meditech. TigerConnect also has a Chatbot API framework called Healthbot.

TigerConnect supports the full range of communication modalities including Messaging, Voice, and Video. Its fully encrypted application ensures HIPPA compliance and overall IT Security. Given its scheduling and other features, TigerConnect has become a Digital Work Hub in Healthcare. TigerConnect helps to streamline the Healthcare Journey for Healthcare Professionals, including Doctors, Nurses, and IT Staff.

Strengths

- Healthcare focus
- Ease of use
- Encryption
- Active directory integration

Challenges

- Video call support

Aragon Advisory

- Evaluate Mobile Collaboration products on their ability to integrate with business applications, workflows, and processes.
- Ask providers of Mobile Collaboration offerings for their short and long-term product roadmaps including, but not limited to, Chatbots.
- Given the rapid expansion of Mobile Collaboration, it will not be uncommon for enterprises to leverage more than one product across the enterprise.

Bottom Line

Mobile Collaboration is poised to challenge Email as one of the leading ways for people to collaborate with each other. As Chatbots come online, machines will also serve as lightweight Digital Assistants. Mobile Collaboration will be part of the fabric of numerous markets, so we expect to see multiple solutions appear in enterprises.