



Research Report

Collaboration and Social Media-2008

**Taking Stock
of Today's Experiences and
Tomorrow's Opportunities**

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Our Perspective

Social media encompasses a range of applications and services available to support communications, collaboration, and information sharing within an individual enterprise and beyond. Our report seeks to identify industry trends and best practices by combining quantitative and qualitative research.

Beyond Ad Hoc Information Sharing

This report begins with a simple observation. For many years, companies have relied on server-centric technologies — together with desktop applications or Web browser-based experiences — to harness the power of distributed workgroups. Companies have deployed various types of collaborative computing solutions to facilitate ad hoc information sharing among workgroups — with varying levels of success.

Most recently, the improvements in Internet infrastructure often associated with Web 2.0 are enabling a new generation of collaboration and content-sharing solutions. Technologies such as blogs, wikis, tag clouds, social networks, and podcasts blend user-generated content and ad hoc information-sharing capabilities on one hand, with data about the people involved and the tasks they are doing on the other.

These new social media technologies promise to be more agile, powerful, and affordable than their predecessors. Their ease of use and simplicity of deployment are driving rapid adoption, especially in consumer and publishing markets. As we will describe in the pages that follow, the adoption of social media applications and technologies within the enterprise is not far behind.

Many organizations are seeking solutions that link their customers and partners with key suppliers and producers, and that smooth the flow of essential information across their value chain. The rapid growth of the social media marketplace promises to provide many opportunities to reduce information-management costs, to improve the efficiency of specific operations, and to increase the quantity and richness of customer interactions.

Our Research Agenda

Our research characterizes key industry trends for collaboration and social media, identifies the best practices driving this emerging market segment, and catalogs the principle players. What follows is a report in three sections:

- Our market survey, *How American Companies Use Social Media*, focuses on key trends in the acquisition and deployment of social media. We have surveyed via direct telephone interviews a representative sample of marketing executives (or their direct reports) in medium-sized and large American firms.

- Customer stories identify industry best practices. We've developed a series of case studies and described how different companies are collaborating through social media to achieve business results.
- A vendor catalog organized around a common set of criteria provides a useful list of social media applications and solutions. We have summarized the capabilities of many of the key vendors in the industry.

As an ongoing service, we expect that this list of vendors will continue to evolve and expand with the industry. Vendors are invited to submit new information as it becomes available.

And what do these trends mean? We've developed an overall set of conclusions for this report in the final section, *When Collaboration and Social Media Matters*. We anticipate continued strong growth in the market as these Web 2.0 technologies help companies transform the ways they do business.

We hope you'll find these results as intriguing as we do. Please send us your comments.

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June 2008

The image features a solid blue background. On the left side, there is a vertical band of a darker, textured blue, possibly representing a sky or a digital interface element. The main title is centered in the upper half of the image.

How American Companies Use Social Media

Tracking Social Media

Social media encompass a range of applications and services available to support communications, collaboration, and information sharing within an enterprise and beyond. Social media include both the up-and-coming Web 2.0 generation of applications and services as well as what came before, what we term Web 1.0 computing environments.

Surveying American Companies

How are companies across the United States actually using social media? What are the principle business benefits, trends, and outcomes? How do companies rate the effectiveness of various tools and technologies for communications, collaboration, and information sharing?

To answer these questions about the growing popularity of social media within American firms, we surveyed senior marketing executives and their direct reports across seventeen (17) different industries. We decided to target marketers as all companies have marketing departments or people leading their marketing functions. Also, marketers are particularly concerned about connecting with customers, and hence most likely to be involved with various aspects of social media.

We focused on medium-sized to very large companies — \$25 million or above in revenue and more than 250 employees in size — as these sized firms are most likely to be seeking solutions to their communications, collaboration, and information sharing problems. We worked with the Center for Marketing Research at the University of Massachusetts Dartmouth, headed by Nora Ganim Barnes. Survey researchers at the Center conducted telephone interviews with 286 respondents in November and December 2007. These respondents were randomly selected from a national database of 2,893 public and private companies that met our selection criteria.

Web 2.0 and Before

What do we mean by social media? Of course, there's a great deal of excitement about Web 2.0, what *Wikipedia* refers to as "a perceived second generation of web-based communities and hosted services (such as social-networking sites, wikis, blogs, and folksonomies) which aim to facilitate creativity, collaboration, and sharing between users."¹ Not surprisingly, there's also a growing interest about the

¹ See http://en.wikipedia.org/wiki/Web_2.0.

impact of these technologies within the enterprise — Andrew McAfee and others describe the adoption of Web 2.0 principles by companies as Enterprise 2.0².

But a second generation builds on the legacy of the first. It's important not lose sight of the range of applications and services that are available to support communications, collaboration, and information sharing over corporate intranets, extranets, and the public Internet. The objectives and outcomes for social media are not new — sharing knowledge and insights, developing integrated business processes, and enabling distributed business teams to work together closely to complete predefined tasks. The new factor is the ease-of-use and deployment — the IT infrastructure simply leverages the underlying technologies of the Internet and the Web. Companies can find services in the “cloud” of a networked computing environment.

We believe that social media encompass both the up-and-coming Web 2.0 generation of applications and services as well as what came before, what we term Web 1.0 computing environments. Social media include:

- The range of applications and services available to support communications, collaboration, and information sharing within an enterprise and beyond.
- Not only the now trend-setting applications such as blogs, wikis, and social networking environments, but also the once-revolutionary technologies such as email, conventional Web sites, shared workspaces, and instant messaging that have been in use for many years.

What counts are how these various applications and services are deployed within and among companies, as well as how they transform business operations.

Our survey thus explores the use of fifteen different types of applications and services that constitute social media, as shown below in Table 1. Different types of tools support different modes of communication, collaboration, and information sharing. Social media tools solve a range of business problems — it's important to fit the tools to the tasks. As we will describe below, there are a number of notable trends.

² For example, McAfee blogs about his research and insights, combining innovative tools with new forms of business organization, at <http://blog.hbs.edu/faculty/amcafee/>

Web 1.0	Web 2.0
Email	Podcasts
Web sites	Really Simple Syndication (RSS)
Web Conferencing	Social Networking
Shared Workspaces	Wikis
Online video	Blogs
Instant Messaging (IM)	Mashups
Enterprise Directory	Social Bookmarking
Newsgroups/Forums	

Table 1. Social media encompass a range of applications and technologies.

Adopting Social Media

Companies are broadly adopting social media. Email and Web sites are universally deployed. Adoption depends in part on the length of time that particular applications and services have been in the market. Web 2.0 solutions are gaining a beachhead among innovators and early adopters within companies and will likely experience rapid growth in 2008.

From the Universal to the Emerging

Let's begin with an inventory of social media. How widely deployed are the fifteen applications and services within American companies? Our results are shown in Figure 1.

We find a range of adoption across the various types of social media, from the universal to the emerging.

Not surprising, email and Web sites are universally deployed — all companies use these Web 1.0 applications, much the way that firms in the twentieth century adopted the plain old telephone service (POTS) as a primary mode of communications and information exchange.

Also not surprising, companies overall are more likely to be using first-generation social media than Web 2.0. Adoption depends, in part, on the length of time that applications and services have been in the market. In particular:

- 74% are using Web conferencing.
- 50% have deployed shared workspaces and online video.
- 47% are using IM and have the capability to exchange short messages.
- 35% rely on an enterprise directory.
- 23% read and/or contribute to news groups and online forums.

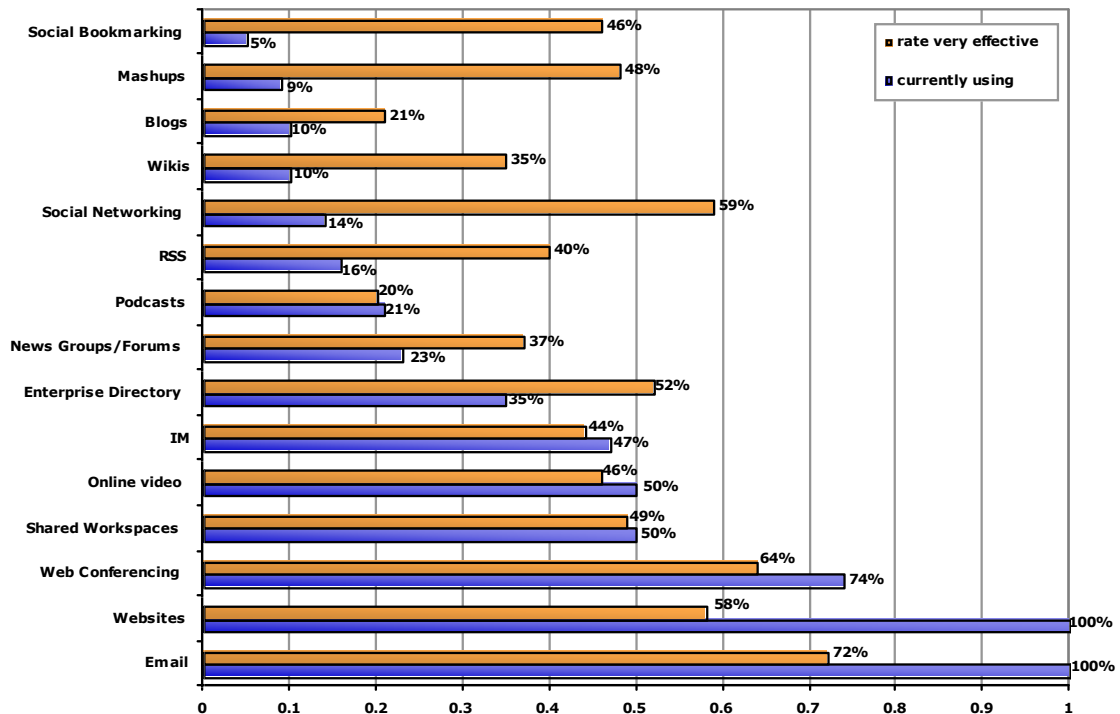


Figure 1. Currently Using Social Media and Effectiveness

By comparison, Web 2.0 applications and services are less widely deployed.

- 21% listen to podcasts.
- 16% rely on RSS.
- 14% are involved with social networks.
- 10% are using wikis.
- 10% are blogging.
- 9% have experience with mashups.
- 5% are using social bookmarks.

There are no significant differences among the rates of deployment when we consider industry, number of employees, or company revenue. Companies large and small, producing all types of goods and services, are likely to be using social media. Adoption is a broadly based phenomenon.

This suggests two factors are important:

- The more mature applications and services are more widely deployed across organizations, regardless of industry or company size.
- Web 2.0 applications and services are gaining a beachhead among innovators and early adopters within companies.

Certainly time matters. Companies go through a maturity cycle when adopting new technologies. Social media are no different. But Web 2.0 has already made notable in-roads and appears to be gaining acceptance at a rapid clip — many of the enabling tools and technologies are less than five years old. As we will further discuss below, we believe that these next-generation applications and services are able to address a range of familiar business problems in new and innovative ways.

Effectiveness

Effectiveness, however, is a different matter. Among the people who are using social media, some Web 2.0 applications and services are rated as highly as those of the first generation. Let's highlight the key trends.

- Email scores highest as an effective social medium -- 72% rate it as very effective. While certainly a sizable percentage, there is still room for improvement. More than one-quarter are less than enthusiastic about email.
- Web sites are another bellwether. Although all companies deploy them for publishing information, only 58% rate Web sites as very effective. We believe that many are looking for ways to unlock their value and address core business issues.
- Some other types of social media are within 10% of being as effective as Web sites. These are: Web conferencing, 64%; social networking, 59%; enterprise directories, 49%; shared workspaces, 49%; and mashups 48%. It's important to note that these are alternative modes of sharing information, beyond simply publishing on Web sites. Two of the five (social networking and mashups) are Web 2.0 solutions.
- Next in importance are social media that focus on communications capabilities beyond email — social bookmarking, 46%; online video, 46%; IM, 44%; and RSS, 40%. Two of the four (social bookmarking and RSS) are Web 2.0 solutions.
- Finally are social media that introduce innovative (yet perhaps less familiar) modes of information sharing. Newsgroups, a first-generation social media application, is rated as very effective by 37% of the marketers we surveyed. By comparison, wikis are rated as very effective by 35%, blogs by 21%, and podcasts by 20% of our respondents.

Thus, the length of time that a particular application has been in use is not the only factor driving effectiveness. Another important factor is the ability to add value to business activities — by reducing operating costs, improving communications, bridging the distances of time and space, structuring the flow of information, and enhancing customer relationships. Web 2.0 tools such as social networking, mashups, social bookmarking, and RSS represent innovative and more flexible ways to collaborate and share information that are not offered by first-generation social media.

We might also point out that many Web 2.0 solutions can be delivered as services over the Internet. Often they can be rapidly deployed within a company or department, requiring minimal or no involvement by the firm's IT group.

Adopting Next Year

Another way to profile the adoption of social media is to compare the “haves” to the “will haves” — companies that are currently using various types of social media with those who report that they plan to use them in 2008. Our results are presented in Figure 2.

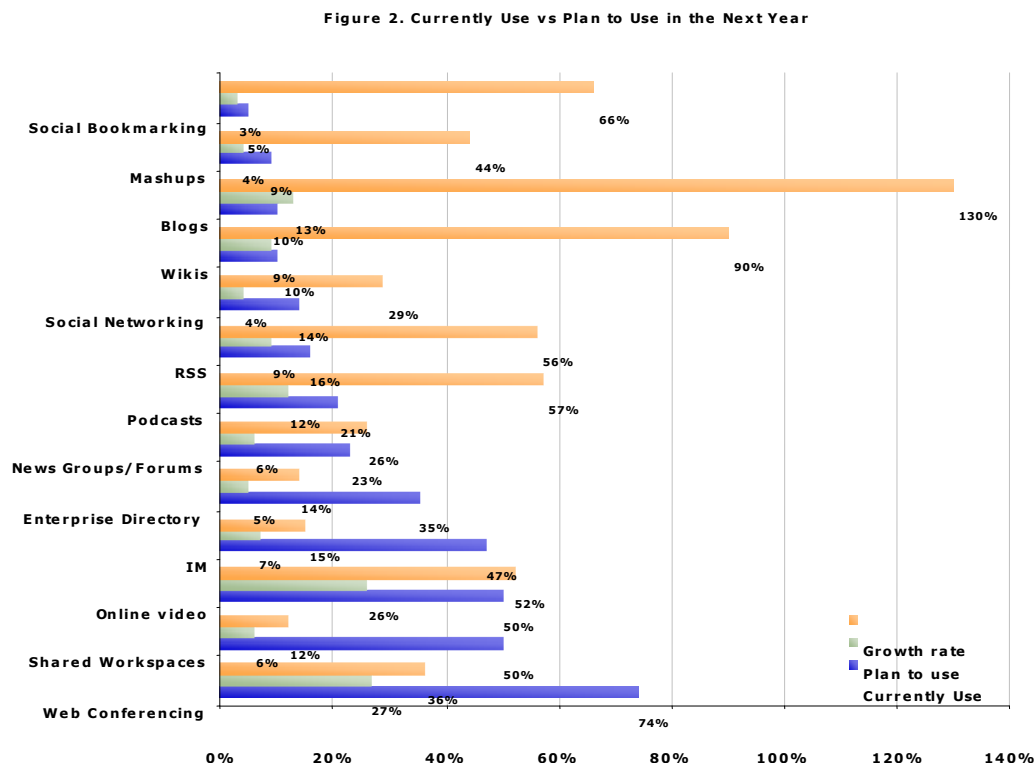


Figure 2. Currently Using Social Media and Plan to Use in the Next Year

While reported plans for future adoption do not guarantee that companies will follow through on their stated intentions, there are several intriguing trends.

First, except for online video, first-generation social media are fairly mature. Prospects for future growth in adoption are predictably lower than for Web 2.0.

- 5% plan new implementations of an enterprise directory, 6% shared workspaces, and 7% instant messaging. When we take into account the extent to which these tools are deployed, we have an adoption rate (‘plan to use’ divided by ‘currently use’) of 12% for shared workspaces, 14% for enterprise directory, and 15% for instant messaging.

- 6% plan new implementations of news groups next year; 27% plan new implementations of Web conferencing. Corresponding adoption rates are 26% for news groups and 36% for Web conferencing.

Most Web 2.0 applications and services are going to grow rapidly during the next twelve months.

- 12% plan to start podcasting next year, 9% plan to start using RSS, 4% are looking at mashups, and 3% are considering social bookmarking. The corresponding adoption rates are 57% for podcasts, 56% for RSS, 44% for mashups, and 66% for social bookmarking.
- 9% are planning on using a wiki next year; 13% expect to be introducing business blogs. The corresponding adoption rates are 90% for wikis and 130% for blogs.

To be sure, fewer firms are using these second-generation tools this year — hence their adoption will accelerate.

We predict that Web 2.0 will enable firms to communicate, collaborate, and share information more effectively over the Internet than heretofore possible with first-generation tools. Web 2.0 promises to enable companies to bridge the gaps for communications and information sharing, particularly when distributed teams need to work together at a distance. Companies can engage customers, partners, and employees in new ways, and thus facilitate collaboration both within the enterprise and across the Internet.

Social Media Profiles

Marketers use social media for a variety of business activities. With Web 2.0, we are seeing the increased adoption of information sharing for a purpose.

Principle Tasks and Activities

Next let's focus on usage patterns and identify the principle the tasks and activities that marketers perform as they use social media. Communications, collaboration, and information sharing mean different things in different contexts.

What do marketers claim they are doing when they use different types of social media? How is Web 2.0 different from Web 1.0? As part of our social media inventory, we asked respondents to identify what each tool “is best suited for” within their companies. We have categorized their open-ended responses to profile how each of the fifteen tools is being used.

As a result, we can describe how social media support different business tasks and activities. We can thus identify when certain social media capabilities facilitate different aspects of collaboration, and predict how tools might transform business operations in the future. Let's focus on what marketers say they are doing with social media and snapshot how their activities change from one tool to another.

Web 1.0 Applications and Services

Email as a Ubiquitous Communications Medium

Not surprising, email is a ubiquitous communications medium that helps to transcend organizational boundaries. As shown in Figure 3,

- 81% of all companies report that email is being used for both internal and external communications. Furthermore, 91% of services-oriented firms rely on email for communicating outside the organization, substantially more than the 78% of technology-oriented firms and 78% of manufacturing firms.
- 13% limit email to internal communications — the proverbial replacement to “interoffice mail” of a bygone era.
- 5% depend on email for information sharing.

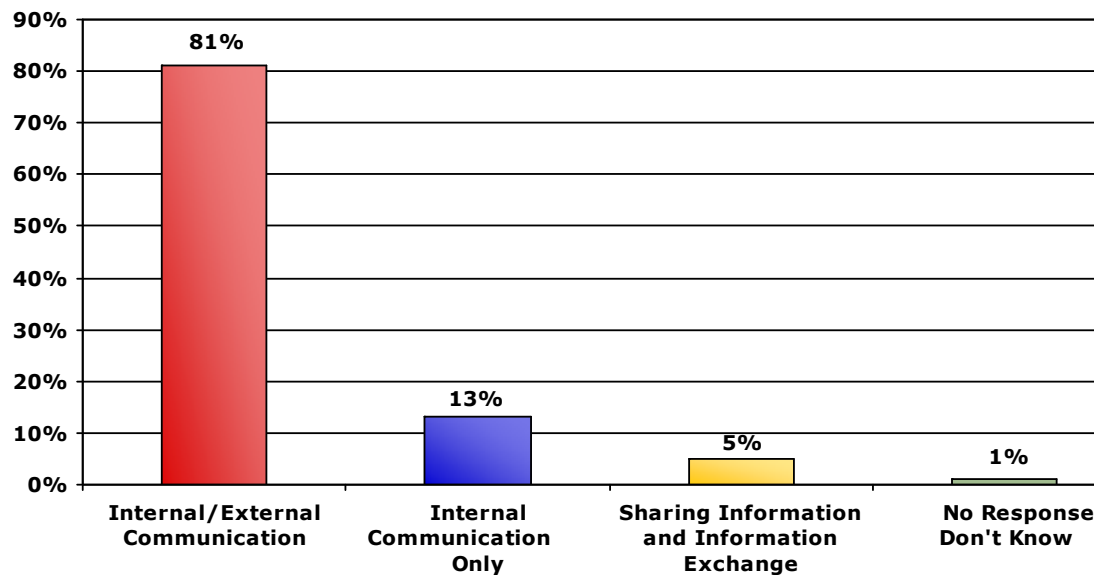


Figure 3. What is email best suited for in your company?

To be sure, email is the most basic social media tool — most firms value its communications capabilities. Nevertheless, a few try to ‘push the envelope’ by using it for information sharing — admittedly a task that few email systems are well designed to support.

Publishing Information on Web sites

Also in line with our expectations, marketers report that their companies publish information on their Web sites to support sales and marketing activities.

As shown in Figure 4:

- 45% use Web sites for general information sharing.
- 29% emphasize customer communications and customer support.
- 23% focus on marketing and advertising. Significantly, company size (determined by number of employees) makes a difference. 17% of medium companies (with 250-499 employees) are using their Web sites this way, compared to 28% of large companies (those with 500-2499 employees).
- 3% highlight e-commerce, the transactional set of activities for doing business online.

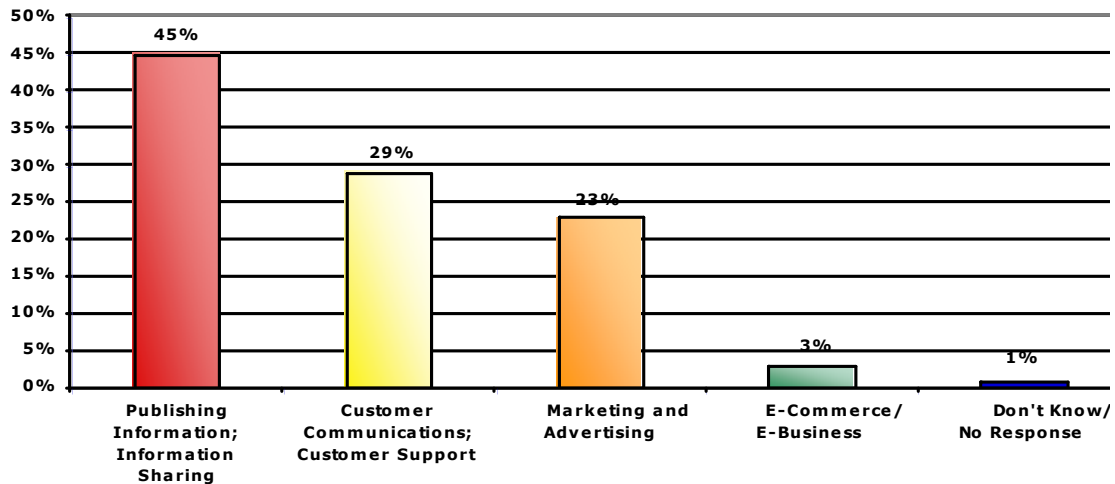


Figure 4. What is your Web site best suited for in your company?

Of course, there are many ways to distribute information over the Web. Publishing is also a social medium -- albeit one that is different in character than email-based communications. It's interesting to note that marketers rely on Web sites to support multiple activities — ranging from the generic (general information sharing) to the specific (conducting business online). Large companies particularly look to the Web for marketing and advertising, in addition to basic Web publishing.

Thus, marketers are trying to meet many goals when publishing information on the Web. In the future, they might better achieve their objectives by using targeted social media applications and services.

Real-time Conferencing over the Web

Web-based conferencing enables distributed teams to work together at a distance, in real time. When people are not together in the same room, they can at least be looking at the same screen display and following the conversational threads through electronic connections. As shown in Figure 5:

- 50% rely on Web conferencing for internal meetings and communications.
- 26% focus on education, training, and support (including support for sales and marketing activities).
- 16% emphasize meeting with customers and other external communications.

This range of activities mirrors the marketing activities of a typical firm. Marketers spend a lot of time on internal communications. Multiple marketing communications tasks — education, training, and support — are essential. Then there's the need to engage customers and others outside the firm.

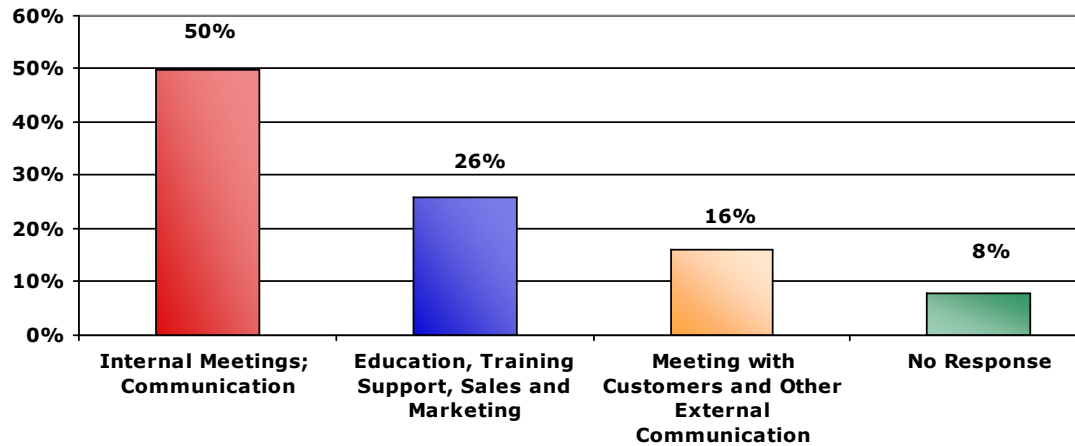


Figure 5. What is web-based conferencing best suited for in your company?

Furthermore, company size (determined by number of employees) makes a difference, as shown in Table 2.

- Very large companies (over 2500 employees) are more likely to use Web conferencing for internal meetings. Having more employees within a firm leads to a greater need for internal communications.
- Medium-sized companies (250-499 employees) are more likely to rely on Web conferencing for education, training, support, and meeting with customers.

	Number of Employees			
	250-499	500-2499	2500<	Total
Internal Meetings; Communication	42%	48%	71%	50%
Education, Training and Support; Sales and Marketing	29%	31%	12%	26%
Meeting with Customers and Other External Communication	22%	14%	7%	16%
No Response	7%	8%	10%	8%

Table 2. Uses of real-time conferencing by number of employees

We suspect that very large companies are likely to use a variety of channels when meeting with customers, or organizing education, training, and support activities. They often have a direct sales force, a specialized support organization, and multiple channels for real-time communications. Medium-sized companies, by comparison, have fewer resources. Thus, convening real-time meetings with customers, or providing Web conferences for education, training, and support, are now important and valuable options.

In short, real-time conferencing over the Web is now an accepted way to do business. It both supplements and reinforces face-to-face meetings, and provides a richer, more visual experience than telephone conversations.

Exploiting a Shared Workspace

A shared workspace promises to ensure that all team members can easily access information stored within a common repository. Marketers exploit these capabilities in several different ways. As shown in Figure 6:

- 33% emphasize the importance of using a shared workspace for communications. (50% of respondents in services firms are using the workspace in this way.)
- 33% focus on document and information sharing.
- 25% highlight collaboration and planning.
- 9% have other concerns or cannot specifically describe what they do.

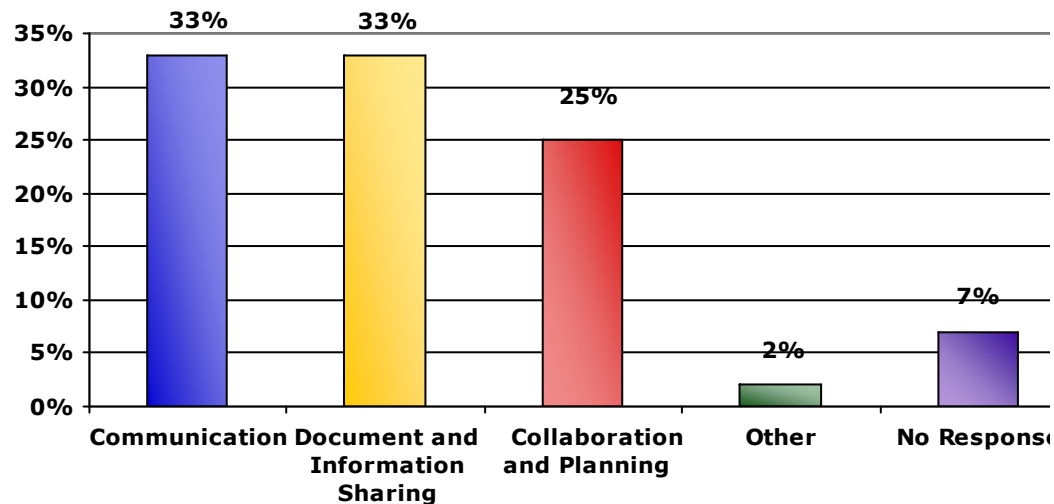


Figure 6. What are share workspaces best suited for in your company?

Furthermore, as shown in Table 3, company size (determined by annual revenue) has an effect.

- Companies with revenue over \$250m are more likely to use a shared workspace for communications.
- Companies with revenue ranging from \$25m to \$49.9m are more likely to emphasize document and information sharing.

Company Annual Revenues				
	\$25-\$49.9m	\$50-\$249.9m	\$250m or more	Total
Communication	17%	30%	45%	33%
Document and Information Sharing	67%	32%	26%	33%
Collaboration and Planning		28%	24%	25%
Other	8%	1%	3%	2%
No Response	8%	9%	3%	7%

Table 3. Uses of shared workspaces by company annual revenues

Thus, a shared workspace fulfills several roles. To be sure, many marketers stress the importance of sharing information in a collaborative manner. It's important to be able to access easily the single source of 'the truth' — the most up-to-date versions of items where the shared workspace is the repository of reference.

Proactive communications is also a factor. One-third of our respondents use a shared workspace for its communicative capabilities — exchanging information, often as part of an ad hoc business process or a collaborative task, and a step beyond sending and receiving email messages. These high communicators are more likely to be from services firms and from companies with large revenue streams — organizations with many ad hoc business processes.

It's altogether possible that these users find that a shared workspace is a 'good enough' solution — after all, it's better than email. But it is also possible that some Web 2.0 applications and services provide more effective ways of supporting ad hoc business processes and collaborative tasks than does a shared workspace.

The Visual Experience of Online Video

Social media include the visual experiences of online video — being able to easily post, share, and view videos over the Web. Marketers use online videos for a familiar litany of business activities, as shown in Figure 7.

- 35% use online video for education and training, sharing information, and customer support.
- 33% rely on this medium for sales, marketing, and product information.
- 20% focus on internal/external communications.

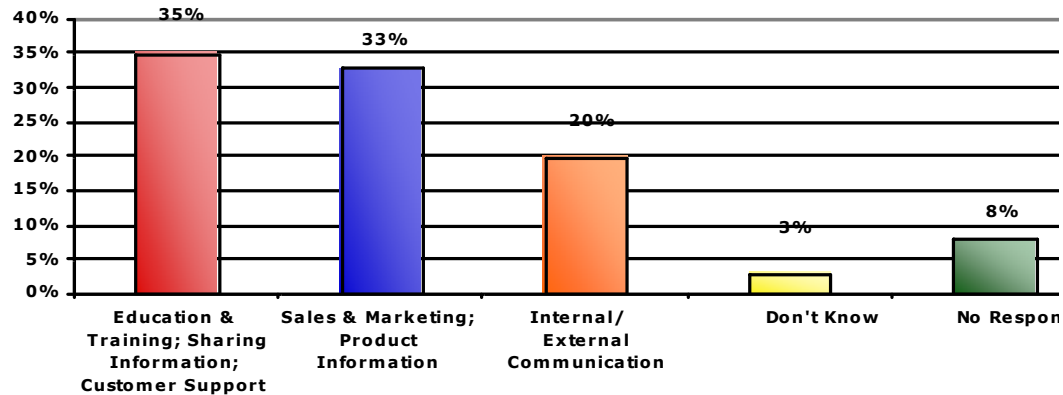


Figure 7. What are online videos best suited for in your company?

It's hardly surprising to find that online video has an important role as an information-sharing medium. After all, we've known since the early days of "talkies" that full-motion video with an associated sound track is a tried and true method for engaging an audience and communicating not only a factual but also an affective and emotional experience. But producing analog video was heretofore a time-consuming and expensive proposition. Digital video is different. 20% of our respondents emphasize the short production times, the aim-shoot-distribute capabilities of digitized video that transform the online experience into a viable and cost-effective communications medium.

Instant Messaging and Business Boundaries

Like email, instant messaging is a communications medium, but one with a notable twist. Organizational boundaries matter. As shown in Figure 8:

- 79% highlight instant messaging as an internal communications medium.
- Only 7% use this social medium for external communications and engaging customers. However, 19% of services firms are using instant messaging in this way.
- 14% have other uses or no response.

Figure 8. What is Instant Messaging best suited for in your company?

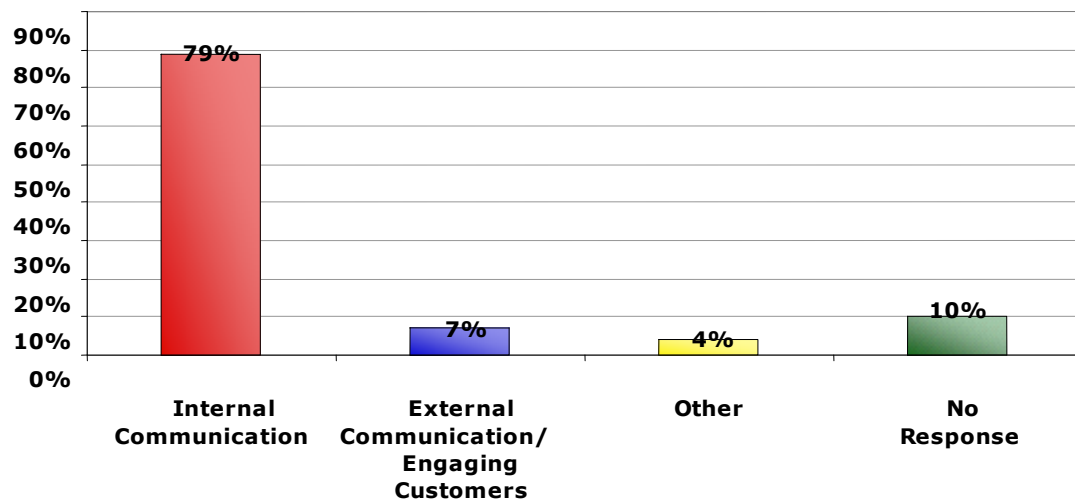


Figure 8. What is Instant Messaging best suited for in your company?

In all likelihood, instant messaging is primarily used for one-to-one communications. Certainly there are technical considerations. Until the recent adoption of federation standards, instant messages were not able to be exchanged across multiple vendors' messaging networks.

Then there's the informality of the medium itself, which is concentrated within enterprise boundaries. It's almost like a phone call that lends itself to interactive chats, rather than the explicit send/receive exchanges of email. Services firms, however, are slightly more likely to be communicating with external parties and therefore are using public services, such as America Online, Google, Microsoft, or Yahoo!, to do so.

An Enterprise Directory as a Network Resource

Like the printed telephone books from an earlier era, an enterprise directory is a social medium for unlocking networked resources. We rely on an enterprise directory to find the references to people and things on the network, just like we have relied on the phone book or 411 directory inquiry to locate people's phone numbers. But with hard-copy listings, we must rely on a fixed criterium (or schema) to look for information — alphabetical in the white pages, alphabetical within business topics in the yellow pages.

However, we have no such limitations with our digital resources.

An enterprise directory is a flexible network service for locating both people and things. It can index items by multiple criteria and search for information in a

flexible fashion. Consequently, its role within an enterprise depends, in no small measure, on what other types of social media resources are available.

Marketers are almost evenly split on the uses of an enterprise directory. As shown in Figure 9:

- 48% focus on communicating and finding people.
- 45% emphasize finding information and resources; finding things.
- 3% identify other uses for an enterprise directory.

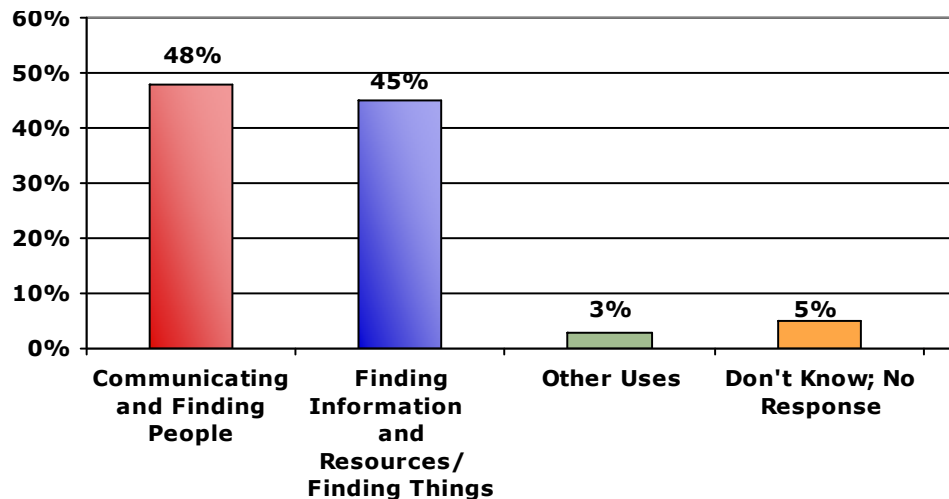


Figure 9. What is an enterprise directory with shared profiles best suited for in your company?

However, marketers in different industries are looking for different kinds of resources. As shown in Table 4:

- 61% of those in manufacturing use an enterprise directory for communications and finding people, compared to 19% in services and 38% in high-technology/medical firms.
- 67% of marketers in services rely on an enterprise directory to locate information and resources, compared to 36% in manufacturing and 48% in high-technology/medical firms.

We suspect that manufacturing firms are more likely to rely on a self-contained, enterprise directory for running their business — and thus stress the importance of locating people. Services firms, by comparison, have access to many types of directories for finding people (many of whom are their customers and partners). Marketers in these firms are challenged to locate information and resources over the network.

	Industry			
	Services	High Tech/ Medical	Manufacturing	Total
Communicating and Finding People	19%	38%	61%	48%
Finding Information and Resources/Finding Things	67%	48%	36%	45%
Other Uses	5%	0%	3%	3%
Don't Know; No Response	10%	15%	0%	3%

Table 4. Uses of enterprise directory by industry

Newsgroups and Forums for Online Discussions

After email, online discussions provided by newsgroups and forums are the oldest type of social media — with some of the earliest communities for computer-mediated communications formed in the late 1960s. Companies have deployed these text-based conferencing capabilities over the years for any number of reasons, often with mixed and varied results.

Thus, it is not surprising that marketers in our survey have a hard time describing how newsgroups and forums are best used within their organization. Rather, they emphasize the overall communications and information sharing — within and among organizations. Notably, organizational boundaries are a consideration. As shown in Figure 10:

- 27% report that newsgroups and forums are best used for internal communications.
- 24% focus on general-purpose information sharing.
- 22% best use this social medium for communicating externally, with customers.
- 16% describe the best uses as other marketing activities.

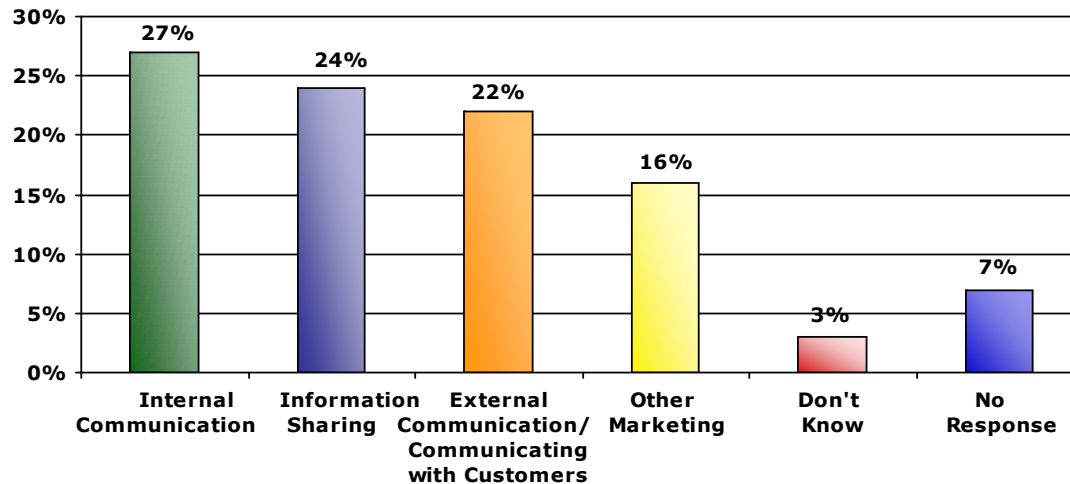


Figure 10. What are newsgroups/forums best suited for in your company?

Thus, marketers use newsgroups and forums for many different purposes. This first-generation social medium supports transitory, text-oriented information exchanges. Group members interact with one another and share information to solve a problem, in an informal and ad hoc manner. Of course, many Web 2.0 applications and services are designed to support these kinds of interactions and experiences. It's important to examine their results.

Web 2.0 Applications and Services

Podcasts Open a Rich Media Channel

Podcasts are a Web 2.0 technology, first popularized in 2004 with the spread of mobile audio devices (such as MP3 players and Apple's iPod), together with the ability to easily distribute and download rich media files over the Internet. Not surprisingly, podcasting is no longer simply an entertainment medium — useful for whiling away the time with music, audio tracks, or video.

Instead, marketers describe several uses for podcasts in a business environment. As shown in Figure 11:

- 40% emphasize the importance of education and sharing information.
- 27% focus on internal/external communications.
- 22% identify product information used for sales and marketing.

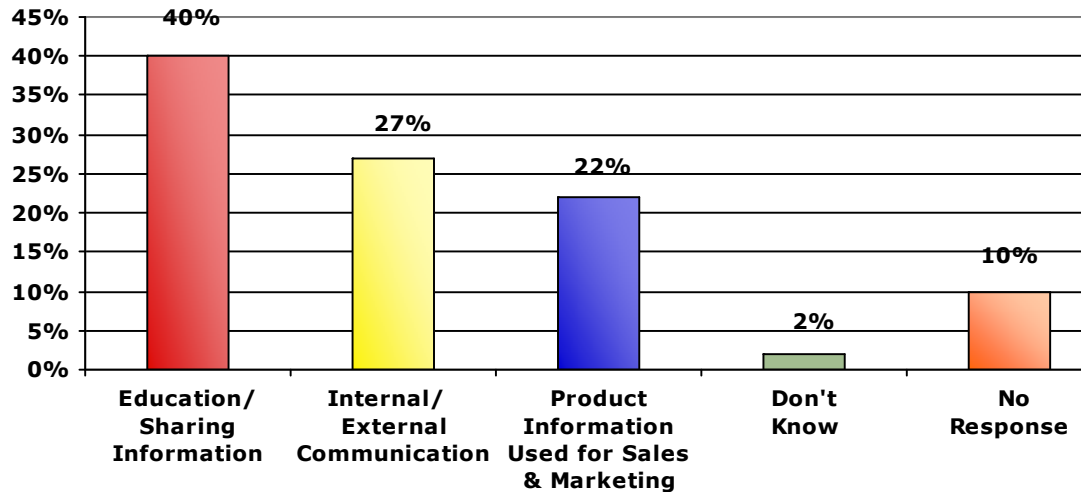


Figure 11. What are podcasts best suited for your company?

Podcasting is used more often by larger companies. As shown in Table 5, firms with revenues in excess of \$50m are more likely to be deploying podcasts as a social media tool. Larger firms may have more resources for producing and distributing the rich media files, and also a greater need to get important messages out to larger numbers of employees, partners, and customers.

Company Annual Revenues				
	\$25-\$49.9m	\$50-\$249.9m	\$250m or more	Total
Education/Sharing Information	33%	42%	39%	40%
Internal/External Communication	0%	36%	19%	27%
Product Information Used for Sales & Marketing	0%	16%	31%	22%
Don't Know	0%	0%	4%	2%
No Response	67%	7%	8%	10%
Total	5%	52%	43%	

Table 5. Uses of podcasts by company annual revenues

Podcasts provide a rich media channel for collaboration and sharing information, similar to how online video also delivers a rich media experience. It's not surprising to find that marketers use both podcasts and online video for comparable activities. If people don't have the time and capability to view a presentation, they might find a moment to listen to it while doing something else. Perhaps podcasts not only facilitate time shifting (being able to listen to a business presentation or view it on one's own time) but also multitasking — allowing participants to listen while they are also doing something else.

RSS for Syndicating Content across the Internet

Really Simple Syndication (RSS) is another Web 2.0 stalwart that has become the de facto standard for syndicating content across the Internet. Those who produce information can easily publish an RSS feed and distribute their content to all who are interested. Those who want to follow a topic can subscribe to the feed and receive automatic updates about (and access to) the content.

Marketers emphasize various aspects of the content syndication experience. As shown in Figure 12:

- 32% use RSS for aggregating information. Services firms are notable aggregators; within this group, 67% emphasize the importance of aggregation.
- 30% use RSS for sending feeds and communicating. Firms with a sizable revenue stream (\$50m-\$249m) are more likely to be distributing feeds; within this group, 43% highlight this mode of syndication.
- 28% rely on RSS for marketing and branding activities.

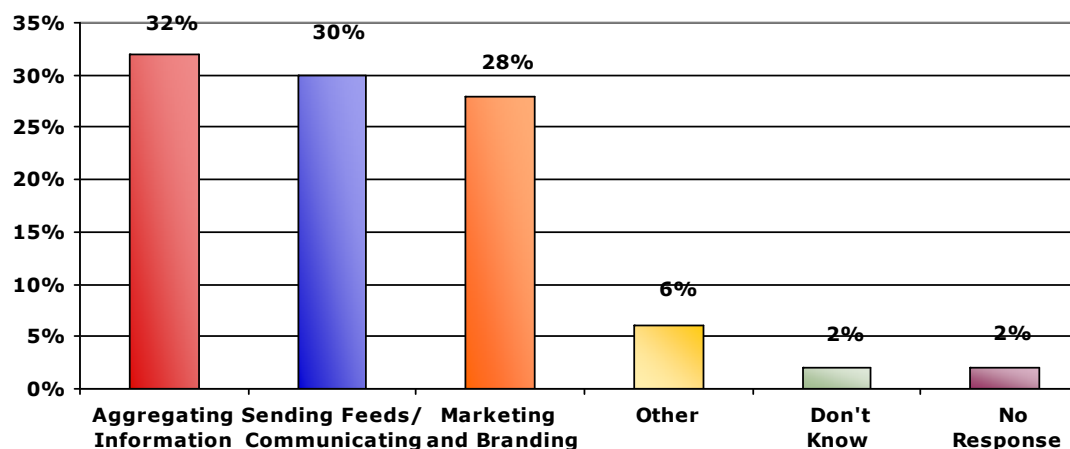


Figure 12. What is RSS (or other content syndication tools) best suited for in your company?

RSS constitutes a publish/subscribe mechanism that many marketers find useful for building a brand. As its name implies, RSS is designed to ensure the simple syndication of content across the Internet, regardless of organization boundaries.

Notably, the marketers in our survey focus on distributing or aggregating feeds, without drawing the distinction between internal communications and external information exchanges. RSS thus serves as a social media solution that transcends organizational boundaries.

Connecting through Social Networks

As the millions of subscribers to Facebook and MySpace demonstrate, social networking is a popular Web 2.0 service for consumers and Web natives (those who

have entered the work force in the new millennium and cannot remember a time without the Internet and the Web). Business innovators are intrigued by the underlying technologies, and are trying to make sense of how best to exploit these Web 2.0 capabilities.

Marketers in our survey identify three factors. As shown in Figure 13:

- 34% focus on marketing activities.
- 32% emphasize connecting with peers; networking with people.
- 27% are concerned about overall information sharing.

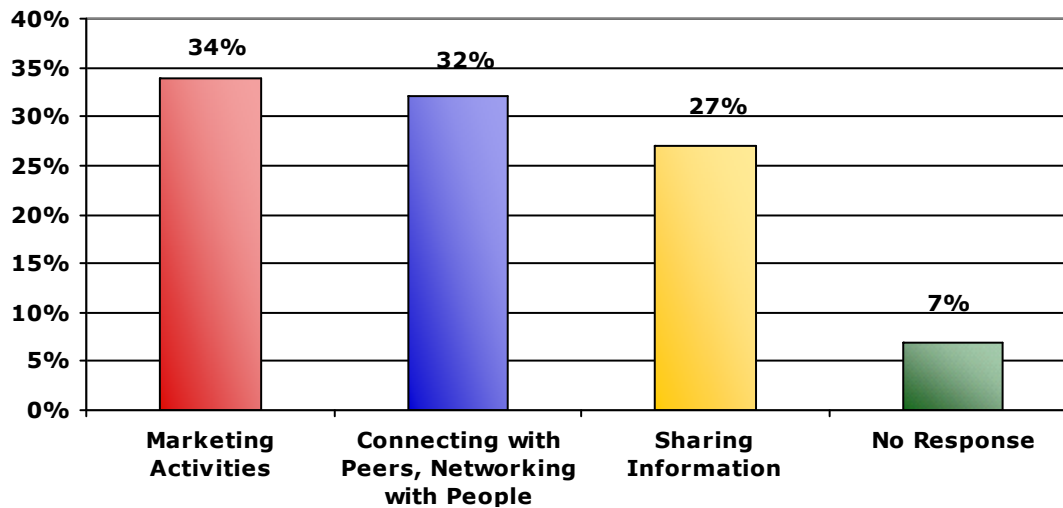


Figure 13. What is social networking best suited for in your company?

Thus, the business applications of social networks combine the familiar with the innovative. What's new is the ability to make connections, and to track and trace relationships. It remains to be seen what the substance of these relationships might be.

Wikis as a Networked Resource

There's a special aspect to information sharing when we can not only post and access content for others to read, but when we can also revise and update what we find. Wikis add a new dimension to the information-sharing paradigm — the content evolves in light of our experiences.

The wiki users in our survey grasp these new capabilities. As shown in Figure 14:

- 48% emphasize communicating with and educating customers and staff.
- 41% focus on information sharing and knowledge resources.

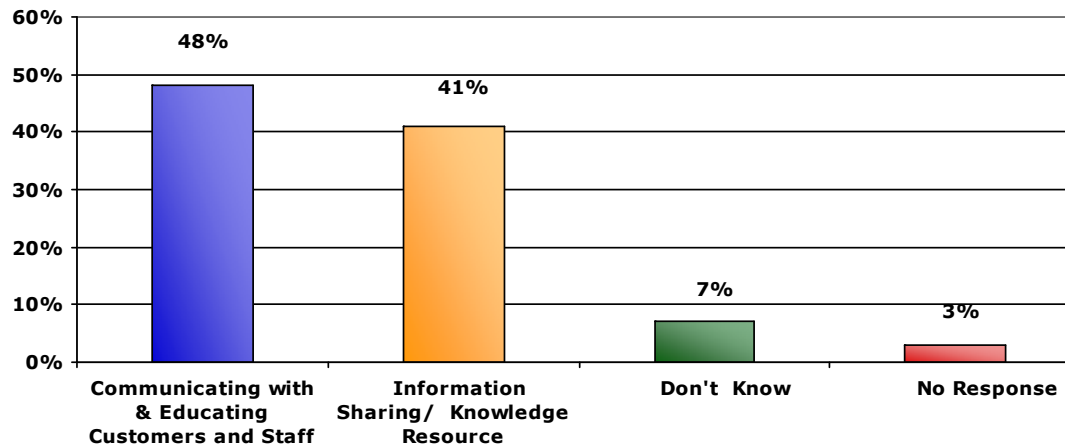


Figure 14. What are wikis best suited for in your company?

There's an explicit educational dimension towards using a wiki. It's not simply an issue of communicating with customers, colleagues, and co-workers; sharing information across organizational boundaries; or building a branded identity — familiar marketing activities for many types of social media. Rather, we believe that wiki users rely on this mode of collaboration as a way to develop an authoritative knowledge resource. There is a business benefit to the wisdom of the participatory.

Blogs as a Communications Medium

Blogs are the quintessential form for Web 2.0 social media — a way to easily and rapidly reach an audience over the Internet and the Web. Bloggers can get the word out and make their views known within their blogosphere.

Business bloggers has a somewhat more focused agenda. For many, its serves as a “feedback tool, a way of forming ‘a chain of ideas’ for exchanging information both internally and externally.” Many are using blogs as a communications medium. As shown in Figure 15:

- 46% are communicating with customers, providing technical support, or engaging in other kinds of external communications.
- 39% are focused on internal communications.

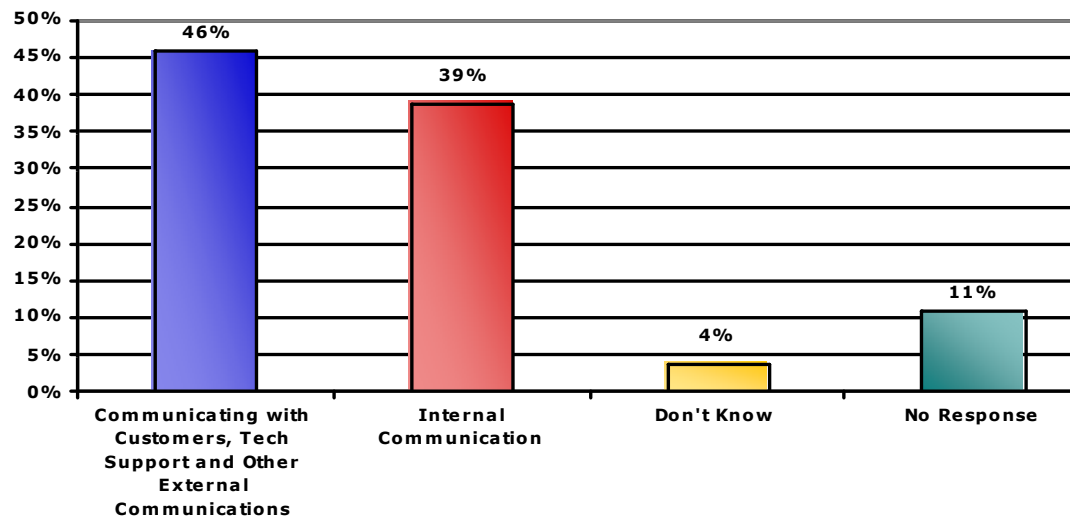


Figure 15. What are blogs best suited for in your company?

Again, organizational boundaries matter. Marketers in our study are conscious that sometimes they are engaging customers and partners outside their firms, and other times they are participating in an internal discussion.

It's important to note what our business bloggers don't say. They do not see themselves sharing information. Nor are they necessarily adding to a knowledge resource. Unlike contributing to a wiki, blogging is a transitory, perhaps ephemeral, activity. Bloggers continue conversations with their audience (and with other bloggers), without necessarily publishing their results as an authoritative resource for future reference.

Mashups for Easy Content Integration

Mashups are sets of Web 2.0 services and technologies, popularized by Google and Amazon beginning in 2005, for integrating content from disparate Web-based sources to create rich Internet applications. For instance, a retailer might mash up the street addresses for all retail locations in a city with Google Maps, and provide customers with an interactive map of all the company's stores. (Google of course captures the Web traffic and page views.)

For marketers in our survey, mashups are an elusive yet intriguing capability. As shown in Figure 16:

- 28% focus specifically on combining information resources.
- 20% emphasize mapping applications.
- 20% describe other kinds of linking applications.
- 28% don't know how mashups are being used.

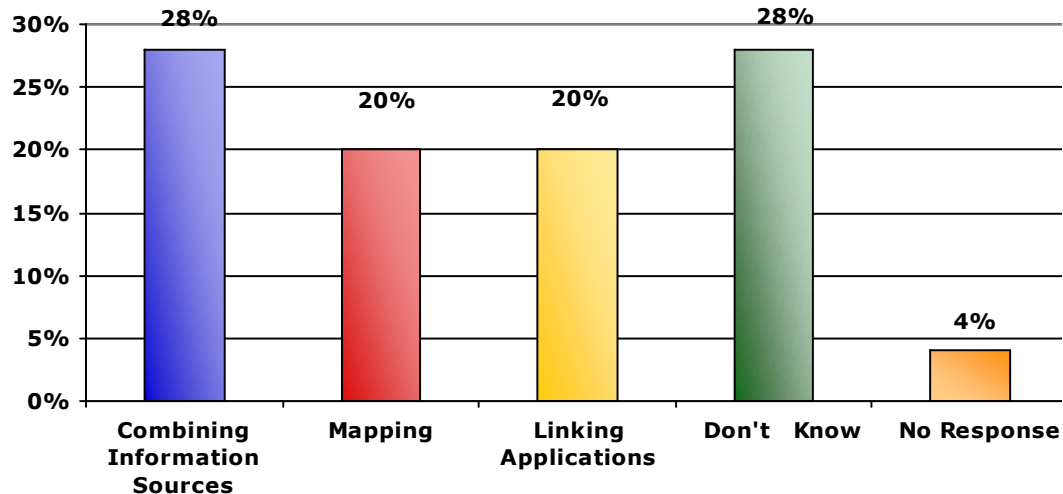


Figure 16. What are mash-ups best suited for in your company?

One respondent described mashups as “creating killer applications” by combining two or more tools on their blog or Web site. Another respondent focused on the importance of Google Maps to help manage how resumes are tracked within the firm.

Admittedly, these are preliminary results and marketers may not understand how the technology works. But we are struck by two factors.

First is the impact of mapping applications — going forward, finding new ways to visualize information are going to have a powerful impact for social media. We may well find that interactive mapping of information resources becomes a new type of Web 2.0 service.

Second is the power of easily combining information from disparate sources in a meaningful fashion. A few marketers in our survey are beginning to see this potential. With access to mashup services and tools that help them solve their problems, we predict that many more line-of-business managers will become advocates for this new mode of content integration.

Tagging References through Social Bookmarking

Social bookmarking is a popular, consumer-oriented Web 2.0 service that is finding advocates among business users. Public sites such as Del.icio.us and Flickr offer ways for ad hoc communities to define, tag, and locate content by various sets of terms. Most blogging platforms include capabilities for adding keywords and categories to blog posts, which then provide the tag clouds of terms used to describe the topics.

As shown in Figure 17, among the relatively small group of marketers who are using social bookmarks:

- 31% emphasize sharing information.

- 62% have other concerns.

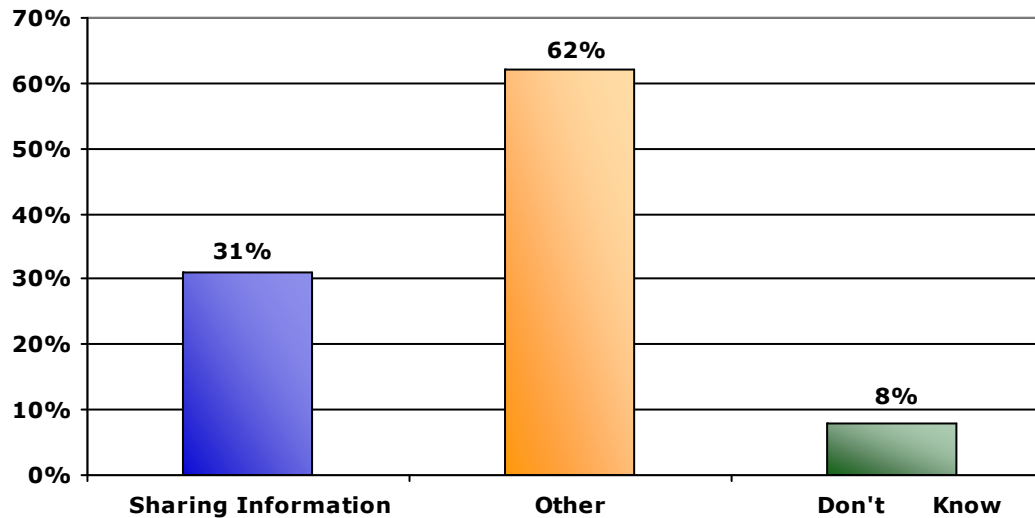


Figure 17. What are social bookmarks best suited for in your company?

From our perspective, the jury's still out on how social bookmarks can best be used within an organization to ensure effective collaboration and information sharing. Categorizing content is not a trivial matter — it requires both a top-down and a bottom-up perspective. We believe that marketers and other business users will need guidance about the underlying information architecture design principles used to categorize content across an organization.

Making Sense of the Generational Shift

What are the prevalent usage patterns for social media? To what extent do Web 2.0 applications and services differ from the first generation? We've compiled,

normalized, and ranked the usage patterns for the marketers in our survey — see Table 6. There are important similarities between the Web 1.0 and Web 2.0. But there are also a few key differences.

Social Media	Communications		Information Sharing	Marketing & Branding	Education & Cust. Support	Other
	Internal/ External	Internal only				
Email	◆◆◆	◆	◆			
Web sites	◆		◆◆	◆		◆ E-comm
Web Conferencing	◆	◆◆			◆	
Shared Workspaces		◆◆	◆◆			◆ Planning
Online video	◆			◆◆	◆◆	
Instant Messaging (IM)	◆	◆◆◆				
Enterprise Directory		◆◆	◆◆			
Newsgroups/ Forums	◆	◆	◆	◆		
Podcasts	◆			◆	◆◆	
Really Simple Syndication (RSS)	◆			◆		◆ Aggregating
Social Networking			◆	◆◆		◆ Connect w/ peers
Wikis			◆◆		◆◆	
Blogs		◆◆			◆◆	
Mashups			◆			◆ Mapping
Social Bookmarking			◆			◆ Various

Table 6. We use a star system to rate the uses of social media.

The ratings are: ◆◆◆66% or more using social media; ◆◆33% - 65%; ◆ less than 33%.

Not surprisingly, enterprise email remains the workhorse for internal and external communications. Marketers in our survey rely on this pervasive yet mature

technology to get things done. It's important to point out that many enterprise Web 2.0 applications continue to use email for notifications — to alert others when

an item requires an action — but only a few introduce new communications-oriented capabilities. RSS delivers syndication (though a publish/subscribe mechanism), while podcasting and blogs leverage RSS for rapid-fire publishing and thus provide a kind of communications capability.

In addition, information sharing is a widely deployed capability of social media. However, Web 2.0 applications and services are being used in a slightly different way than their predecessors. There is less emphasis on generic information sharing and a greater focus on information sharing with a purpose. This includes sharing to support such activities as marketing, branding, education, training, and customer service. This may be due to the fact that Web 2.0 applications and services can be more easily tailored to support particular business tasks and activities. Marketers, together with their partners and customers, are not simply publishing (and consuming) content. Instead, they are also engaging in business-oriented interactive experiences and ad hoc business processes — such as consulting a wiki to find an answer to a question or editing a wiki page to augment the shared information with new insights. Web 2.0 enhances the ability to support the ad hoc business processes, these shared collaborative experiences, in new and innovative ways. Once the network connections are in place, there is little up-front investment or overhead required to connect to (and leverage) the new collaborative service.

The end result, we believe, is an evolution of capabilities from one generation to the next. Web 2.0 applications and services are going to become more pervasive across the enterprise. They are going to extend and enhance the capabilities of the first generation, and bring us one step closer to being able to 'do business' in a seamless network environment.

A Social Media Roadmap

Successful collaboration combines effective communications with focused information sharing.

It is possible to sketch a social media roadmap, suitable both for vendors seeking to profit from Web 2.0 applications and solutions, and for end-user organizations seeking to exploit the capabilities of these next-generation tools and technologies. Successful collaboration combines effective communications with focused information sharing. What is new about Web 2.0 is the ability to leverage content that's easily distributed across enterprise intranets, extranets, and the public Internet. What is new about Web 2.0 is the flexibility to focus the tasks related to content exchange, delivery, and storage around a series of collaborative activities and ad hoc business processes.

Vendor Options

Web 2.0 vendors need to provide the tools and services that exploit these network connections. Sometimes the enhancements are conceptually simple — albeit challenging to implement. For example, provisioning a shared workspace as a network resource overcomes the barrier of relying on an IT organization to install an application within an enterprise infrastructure. Task teams can easily sign up for this new collaborative service. A vendor, in turn, must have the wherewithal to securely and reliably deliver this service over the Internet, and thus support a stellar customer experience, often requiring a high quality-of-service guarantee.

Sometimes the new capabilities augment and extend existing information-sharing paradigms. For example, a wiki is often an easier and more collaborative way to develop a shared knowledge resource than is a collection of newsgroups and forums. Thus, wiki vendors need to develop the appropriate management frameworks that adapt to the operations and activities of collaborative workgroups. Wiki vendors also need to provide guidance about how best to exploit this medium.

Company Challenges

Companies in the multiple industries we surveyed face their own challenges. They need both to reinforce relationships with customers and partners, and to improve internal communications. These firms are certainly familiar with the power of networks. All are using email and Web sites. A majority are finding these tools effective for routine communications and basic information sharing. Companies now need to leverage these collaborative resources and extend their network know-how.

Web 2.0 applications and services provide new information-sharing paradigms which embrace and extend the capabilities of the first generation. Companies can best begin by considering their current collaborative environment. They need to assess their network infrastructure. They need to identify how they are

communicating and sharing information across key aspects of their business operations. They need to identify the barriers, the most problematic areas of operation, sometimes referred to as the 'low hanging fruit.' For example, staff members might be sharing documents by exchanging email and attachments, activities which can be more effectively accomplished through a shared workspace or a workgroup wiki. As another example, a threaded discussion about product requirements might be more effectively supported by a blogging tool. For business managers and participants alike, it's important to identify both the outcomes and the business processes underlying the collaborative activities.

This audit is only the first step towards experimenting with solutions and developing workable plans. Building a next-generation collaborative environment is an iterative process. There are many options. It's important to take into account what's currently in place and what the outcomes need to be.



Customer Stories

Awareness at Earth Knowledge

Geographical Information and Community Consciousness

Background: Building Awareness

Communities throughout the American Southwest have developed around water sources. Pioneers and homesteaders often channeled water from rivers at great distances, or drilled into underground aquifers, not entirely understanding the consequences of their actions. Today, communities do not have the luxury of not knowing. There's an awareness of the links between local and regional development and the management of scarce water resources.

Earth Knowledge, a Tucson-based consulting firm, builds on this awareness by helping communities, businesses, and governments face the challenges of balancing development with environmental resources. Earth Knowledge provides timely information about land use, environmental impacts, and natural resources. Headed by Frank D'Agnese, an earth scientist with 15 years' experience in the U.S. Geological Survey, the firm is both a knowledge resource and a facilitator for local decision-makers to share their insights and expertise. To help government officials, local experts, and concerned citizens develop environmental plans and policies, the firm is using Web 2.0 technologies, including enterprise social media, RSS, and geoweb mapping tools.

The Challenge: When Location Matters

Throughout the Southwest, geography matters. Earth Knowledge works with both large and small communities in Nevada, the driest state in the country, to develop virtual water resources management tools. Earth Knowledge helps concerned citizens to better understand how pressures for valuable water resources may affect their way of life.

The Central Nevada Regional Water Authority, an agency of eight Nevada counties working with Earth Knowledge, intends to use social media tools to better inform its stakeholders about the changing landscape of water in the state. Sandwiched between the rapidly growing communities of Las Vegas and Reno, Nevada, these eight counties face many planning and regional development issues. National, state, and local officials; national and local experts; environmental groups; and other concerned citizens need to stay abreast of the various land-use and water-resource planning activities across this fast-changing, yet widely distributed, region.

Earth Knowledge facilitates this information-sharing with an online community where multiple parties can communicate about resource planning. Earth Knowledge relies on the Awareness enterprise social media platform, an interactive online venue, to power this and other Web-based communities. Awareness allows local officials and community members to collaborate and share information with one

another through several private (password-protected) online communities, while the general public can easily find information on the unrestricted, public community Web site.

Meeting the Challenge

Awareness and the Geographical Web

Awareness organizes and distributes user-generated content for both public and private communities, as shown in Illustration 1. The Awareness platform integrates blogs, wikis, threaded discussions, and document sharing, based on an extensible, unified platform that includes community building, user management, workflow, configuration, and content moderation capabilities. The platform is delivered as a hosted service over the Internet and includes integrated enterprise security to determine the roles, permissions, and groups for community members.



Illustration 1. Earth Knowledge

Earth Knowledge relies on the Awareness enterprise social media platform, an interactive online venue, to power this and other Web-based communities.

Moreover, Awareness provides extensive content categorization capabilities and supports not only taxonomies and folksonomies, but also geocoding — tagging technology that is essential for integrating with mapping applications. Content contributors can tag information by location, and the Awareness platform is automatically able to identify how information and content about one location relates to another.

Geocoding in Action

Geocoding is crucial for managing user-generated content related to land-use planning and development. It's not enough for people to post news about a particular topic; predefined keywords provided by a taxonomy or the ad hoc topics added by a tag cloud are only useful up to a point. It's also important to contextualize this information and understand how one person's contribution relates to others, in terms of location and the geographical issues at hand.

Once geocoded, user-generated content can be mashed up against Google Maps, Google Earth, or other Web-based mapping applications to generate additional insights. It is easy to visualize interrelationships using geographical mapping motifs.

Earth Knowledge can create the content categories that contributors use when posting information about water issues in Nevada or in other communities that it supports. Earth Knowledge maintains both the formal taxonomies and the ad hoc folksonomies that local officials, scientists, and concerned citizens need when tagging user generated content. Earth Knowledge has also defined the steps in an ad hoc business process for community contributors to geotag their postings.

Result: A Mappable Ecosystem

In short, Earth Knowledge relies on Awareness to enable a mappable ecosystem.

Local policy makers, concerned citizens, and others can find information not only by predefined terms or ad hoc categories, but also by location. With the appropriate access rights and permissions, they can blog about topics, contribute to wiki pages, or add entire documents to a conversation — and automatically map the information to the relevant geographical locations. Community members can subscribe to information channels and receive automatic updates through RSS feeds, again including location as one of the subscription (and syndication) criteria.

Tagging user-generated content by location represents a new dimension for information access, delivery, and community development. By leveraging the geocoding capabilities of the Awareness platform, Earth Knowledge builds geographically aware communities across the Web.

EMC Documentum eRoom at Bechtel

Structuring Secure Collaboration across the Extended Enterprise

Background: Sharing Information

Headquartered in San Francisco, Bechtel is one of the preeminent engineering, construction, and project management firms in the world. Currently its 42,500 employees are engaged on hundreds of projects in nearly 50 countries.

Bechtel personnel work with a network of partners and suppliers to design, develop, and deliver each project for the customer. A key to success — completing a project on time, on budget, according to plan, and as specified — is being able to share relevant information in a coordinated fashion across an extended enterprise of partners and suppliers.

Bechtel relies on the Documentum platform from EMC to manage all of the planning, design, scheduling, and business documents for various projects. Documentum functions as an enterprise-wide electronic document management (EDM) system. It serves as the repository of record for capturing, organizing, storing, and archiving all project-related documents that are developed internally by Bechtel engineers, executives, project managers, and other staff throughout the life of the project.

EMC enhances its information management capabilities with eRoom, a collaboration platform for sharing documents across an extended enterprise. Often deployed on a company extranet or the public Internet, eRoom provides a shared workspace where internal staff members and external people can exchange business documents in a secure and coordinated manner.

The Challenge: Beyond Hard Copy

Bechtel assigns to each project one or more documentation coordinators, who are responsible for maintaining the project-related documents within Documentum. Coordinators also manage the flow of formal communications with partners and suppliers, based on business rules defined within Documentum.

Prior to the Internet, Bechtel exchanged documents with its vendor community by sending and receiving hard copy items. This was a time-consuming and often costly process.

With the availability of broadband Internet connections as a viable mechanism for information exchange, Bechtel and its network of partners and suppliers sought to coordinate their business activities electronically. The business benefits were attractive — rapid information exchange buttressed by reduced operational costs. With fewer printed documents to manage, the company could substantially cut its mailing and document production expenses.

But finding a secure yet flexible solution for coordinating across the extended enterprise was the challenge. Relying simply on email was not appropriate. Bechtel staff frequently needed to exchange large and complex (multipart) documents with partners and suppliers. From a practical perspective, the size of these documents often exceeded the capacity of many companies' email networks. In addition, Bechtel staff needed to maintain control for document revisions and be able to track the versions of documents exchanged with partners and suppliers — functions not supported by email.

Nor was using file transfer protocol (FTP) across the Internet anything but a stop-gap measure. FTP only supported authentication at the server level and thus did not offer the granular, (folder and document level) security that Bechtel required. Also, few FTP sites provided easy-to-use experiences. Documentation coordinators would require specialized training to operate them. Bechtel needed a shared workspace for collaborating across the extended enterprise.

Meeting the Challenge: Shared Workspaces

In late 2003, Bechtel decided to implement eRoom as its solution for structuring secure collaboration. Six months later, the company launched eRoom as the transfer point for managing the flow of documents between internal staff members and external partners and suppliers.

Bechtel deploys eRoom as a shared workspace, running outside the company firewall and accessible to its vendor community. Bechtel organizes the document transfer environment on a project basis, as shown in Illustration 2. Different organizational units within Bechtel maintain their own eRooms, each defined by a customized template, designed to control the flow of information.

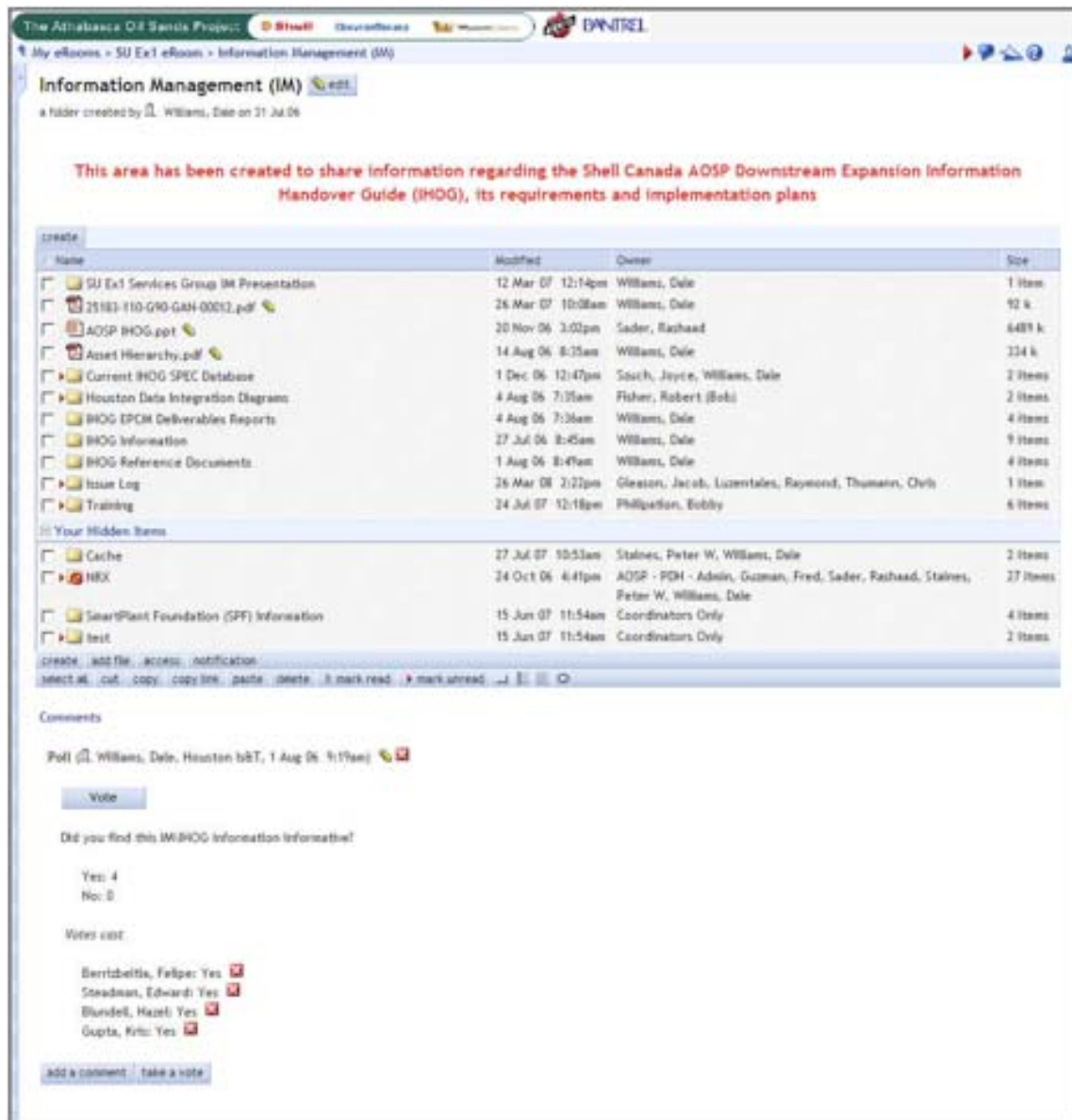


Illustration 2. Bechtel

Bechtel organizes projects by shared workspaces (or rooms). Members can contribute documents and other files to the collection of folders, stored within the room.

Security and access controls are centralized through the shared workspace. Documentation coordinators within Bechtel manage a series of eRoom folders for their projects. These people grant privileges to individuals at the partner and supplier firms to use designated eRoom folders. Partners and suppliers can only locate, view, and open the eRoom folders for which they have access privileges. eRoom maintains both the privacy and security for commercial relationships.

Each eRoom defines three levels for document security — coordinator, participant, and observer. A coordinator can add both folders and documents to an eRoom; a

participant can only add documents; an observer can simply view the information stored within an eRoom.

Documentation coordinators continue to manage project documents within Documentum as the repository of record. When exchanging information with partners and suppliers, coordinators simply import documents from or export them to project-related eRoom folders. External users with appropriate privileges upload and download documents as they continue to work on Bechtel projects.

Finally, Bechtel relies on the notification capabilities within eRoom to alert employees and external users when documents change or other events occur. People can then access and act upon the new information in a timely manner.

Results: Exchanging Documents

Rather than relying on hard copy delivery, email, or FTP, Bechtel and large segments of its vendor community now coordinate the exchange of business documents over the Internet through a shared workspace. From Bechtel's perspective, eRoom solves a critical business problem — facilitating the flow of documents across the extended enterprise in a secure, manageable, and easy-to-use manner. Partners and suppliers benefit through the expedited methods of collaborating with Bechtel.

After being in production for more than three years, Bechtel assesses the business benefits of eRoom in terms of a number of metrics.

- Bechtel maintains over 130 eRooms for specific projects and functional services. It also deploys over 50 eRooms to support various internal operations.
- There are approximately 7,900 external users and 7,500 internal users with rights to access specific projects.
- The eRooms deployment at Bechtel contains roughly 1 terabytes of project-related information. Some project-related eRooms contain close to 100,000 items, encompassing up to 100 GB of information.
- When engaged on a large project, Bechtel staff together with related partners and suppliers often exchange over 600 documents per day through eRoom.

As a global and distributed firm, eRoom enables Bechtel to better coordinate key activities with partners and suppliers across its extended enterprise.

Lessons Learned

As an engineering, construction, and project management firm, Bechtel depends on document-centric business processes. The company relies on eRoom to solve a critical collaboration problem — providing a shared workspace for exchanging documents across the extended enterprise. Bechtel benefits from eRoom by

augmenting its formal project control activities, implemented by managing electronic documents with Documentum. eRoom provides the underlying framework for collaboration.

At Bechtel, documentation coordinators establish and maintain the information-sharing activities. These people play a critical role in managing large and complex engineering projects. While they need to take on additional responsibilities for coordinating the flow of project information through eRooms, their efforts improve the overall business processes.

Gilbane Group Conclusions

A large enterprise can rely on a shared workspace to structure secure collaboration with its community of partners and suppliers across an extended enterprise. But enterprise collaboration does not occur in a vacuum — it's important to define the flow of information up front, and identify the roles and responsibilities for both internal and external users.

Companies seek to collaborate across the Internet to solve business problems. An underlying collaboration environment, such as a shared workspace, enables ad hoc information sharing. Yet this is only an initial step.

Successful companies also focus on the human dimensions — how best to leverage the new information flows that electronic connections enable. It's important to manage the processes by defining the roles, responsibilities, and appropriate compensation for people who have the job of coordinating the flow of information across a shared workspace.

EMC Documentum eRoom at Wharton

Helping Students and Faculty to Collaborate

Background: Group Projects and Collaboration

According to the University of Pennsylvania Web site, the Wharton School of Business was founded in 1881 as the world's first collegiate school of business. Since then, “Wharton has continued to pioneer innovations in education across its pre-eminent undergraduate, MBA, executive MBA, doctoral, and executive education programs. Their wide range of programs and faculty expertise provides in-depth knowledge on virtually every major challenge facing global business today.” Group projects and collaboration among faculty and students are deeply woven into the fabric of a Wharton Education. In 1997, they began a formal effort to create a cutting-edge collaboration environment.

eRoom was founded in 1996 to provide a shared workspace across the Internet, one that would manage access rights and permissions on a granular level. In 2002, Documentum acquired eRoom and thus added extensive collaboration capabilities to its enterprise content management product offering. In 2003, Documentum was acquired by EMC to serve as a cornerstone of its Information Life-Cycle Management (ILM) product portfolio. EMC Documentum now describes eRoom as “an easily adopted web-based collaborative workspace that enables distributed teams to work together more efficiently.”

The Challenge: Beyond In-person Meetings

In 1997, the Wharton IT staff noticed that there were groups of students meeting all over campus to work on class projects. The IT staff decided to develop an online platform to support collaboration among students and interactions with faculty. They wanted an environment that would expand on rather than replace the in-person meetings and be easily integrated with other technology applications serving their population.

Meeting the Challenge: Customizing Spaces

webCafé

The Wharton IT team made the conscious decision to deploy collaboration technology rather than a typical course management platform. By August 1998, they developed a pilot collaboration application called webCafé using eRoom's innovative technology. WebCafé enabled project teams to improve discussions, share information, and complete projects. The Wharton team found eRoom to be flexible and easily configurable, so that the entire user community could customize and use their collaborative workspaces to support a diverse set of academic processes.

eRoom's templates support online calendars, the distribution of course materials and slide presentations, threaded discussions, secure project folders, and shared workspaces. WebCafé made it easy to link to course Web sites, assessment tools, and grade books while simplifying the submission of finished assignments. Faculty members were impressed with the capability to distribute course materials, syllabi, readings, and lecture notes. All participants benefit from access and version control functionality; annotation and note sharing; automatic membership based on enrollment data marts and enterprise directories; and the built-in search engine. Participants are allowed to log on to the system without using additional passwords and can interact with other participants both synchronously and asynchronously. (See Figure 3.)



Illustration 3. Wharton webCafé

webCafé organizes all of the information and activities about a course into a shared workspace.

FacultyCafé

As webCafé flourished, the range of applications continued to expand to the extent that the IT team determined that certain applications should be designed and used exclusively by faculty. One of the key drivers for this change was the rapid growth of Wharton's Executive Education program, where many courses or programs are customized to the specific requirements of a sponsoring corporation.

FacultyCafé is designed to allow faculty to open their eRooms to colleagues at other universities to enable collaboration on research and journal articles, as shown in Illustration 4. More recently, an eRoom application has been developed to support the recruiting of new faculty, including the complex and content-intensive administrative aspects of the application and hiring processes.

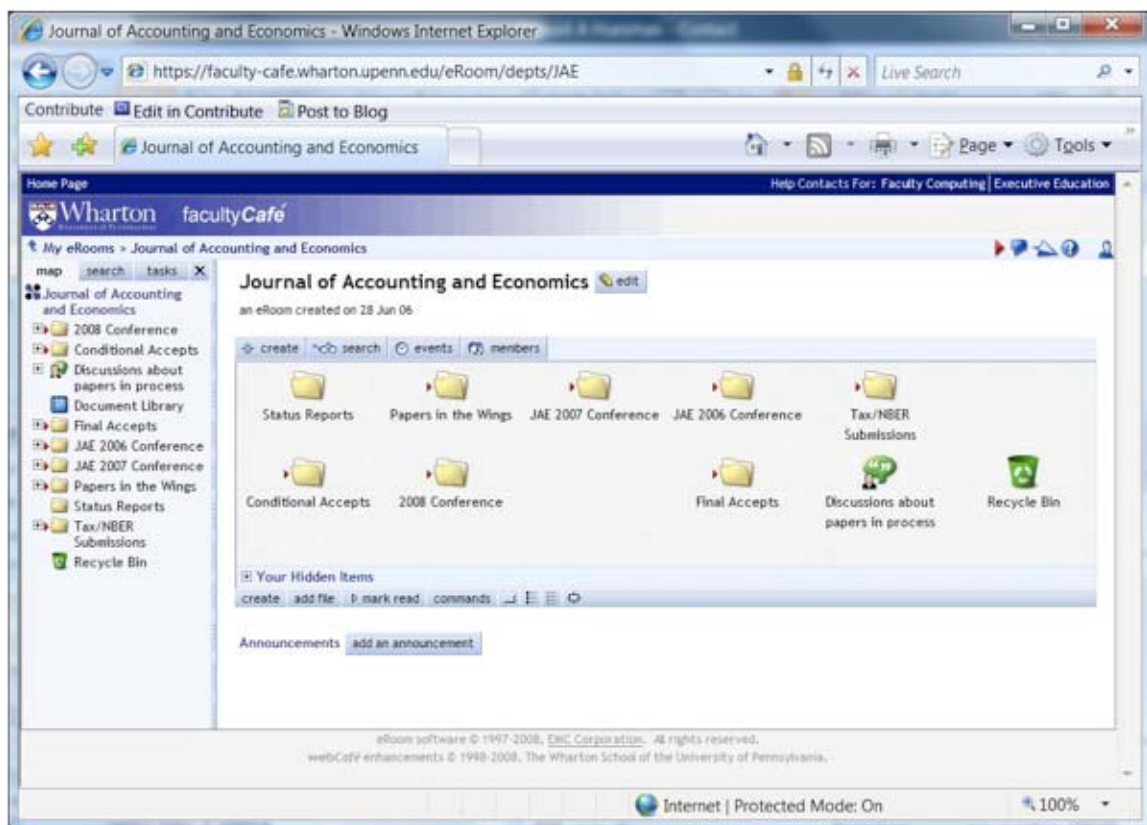


Illustration 4. Wharton FacultyCafé

FacultyCafé provides Wharton with a workspace for sharing information with faculty members across the university and at other institutions.

Results: Widespread Adoption

- Immediately after the pilot was completed, webCafé usage spread virally with very little promotion. While webCafé is still considered optional, it is used in 85% of courses. There are over 2500 eRooms with over 10,000

users. When offered the option to use a traditional course management system, over 90% of faculty members selected eRoom.

- Student satisfaction ratings consistently exceed 92% over a six-year period.
- The range of applications is greater than anticipated. It is used for student clubs, conference planning, and networking with industry colleagues.
- webCafé has been especially valuable for the Global Consulting Practicum. In this program, Wharton students partner with business students from universities in foreign countries such as Israel, India, China, Chile, and Columbia to work with a company or industry centered in the foreign country. The webCafé collaboration environment has allowed the student teams to work together almost seamlessly despite the complications of distance and time zones.
- There are now 300 FacultyCafé rooms, compared with only 10 rooms three years ago.
- The FacultyCafé has enabled several Wharton faculty members to edit key academic journals.

The sophisticated collaboration environment has enabled Wharton to incorporate and manage “observable outcomes” into their custom executive education courses. FacultyCafé permits faculty, students, and sponsors to agree on the tangible, work-related outcomes that should result from participation in the executive education courses. They measure progress against the desired outcomes for the period of a year after the course(s) have concluded. At the end of the process, the actual progress towards desired outcomes is measured. Following dialogues with participants, common roadblocks that limited the achievement of desired outcomes are described, and suggestions are offered to both sponsors and students as to how these roadblocks can be overcome.

Lessons Learned

- Wharton faculty and IT professionals were visionary in recognizing the importance and value of collaboration in creating learning and research environments.
- To achieve their maximum impact, communities should be closely integrated into the overall technology environment. Shared datamarts and enterprise directories make content and content creators more discoverable.
- The FacultyCafé made the course design process far more efficient and allowed faculty to remain in communication with the corporate sponsors while the courses are under way and thereafter.
- By focusing on the capabilities of new technology rather than concentrating on using technology to computerize existing procedures and workflows, it is possible to achieve breakthrough innovation. For example, Wharton has developed an online auction process that allows students to earn points and then bid on seats in the most popular and oversubscribed elective

courses; auction "winnings" lead to automatic membership in webCafé course sites. This application has won many awards and is very popular with students.

- Communication is a vital ingredient in the ongoing value proposition of a university. Whether to better engage with current students, enable networking with alumni, or collaborate with colleagues and peers worldwide, all stakeholders benefit.

Gilbane Group Conclusions

- Due to the diversity of participants and the range of applications, collaboration technology and communities are particularly well suited to academic environments. Academic communities make particularly good development partners.
- Participants suggest the highest-value applications. New applications for eRoom continue to surface after almost ten years.
- Workspaces are replacing e-mail and instant messaging as the primary venue for communicating and storing and exchanging content and data files.

MindTouch at Red Mountain

Open Source workspaces for high-value collaboration

Background: Connecting Enterprise Operations

MindTouch describes its open source Web collaboration technology as “a leading wiki and application platform for communities and enterprises and a wiki social media platform for online media and brands. MindTouch Deki improves communication, collaboration, and easy to use tools for creating web-based communities. MindTouch products are deployed by major media companies and online communities, small to large enterprises, research institutions and government agencies worldwide.” More than 1,400 new product downloads occur every day. The technology is also available to developers for integration into their products and systems. Developer and OEM relationships account for another 1,000 downloads per day. There are now more than 300 customers subscribing to support and training services.

Red Mountain Retail Group (Red Mountain) is one of the many firms that have downloaded and implemented MindTouch Deki and rely on it for tying together key enterprise operations. Red Mountain is a commercial real estate development firm. It acquires, rehabilitates, and re-tenants unsuccessful shopping complexes and also builds high-quality new developments. In-house capabilities — including Acquisition/Dispositions, Financing, Development, Leasing, Entitlements, TBI, Inc. (design & construction), and Asset Management — enable Red Mountain to make swift and proficient responses to opportunities yielded by the ever-changing conditions of the retail and mixed-use real estate market.

The Challenge: Distributed Project Management

Red Mountain has its headquarters in three locations, as well as hundreds of properties scattered across seven states. The timely selection of the right opportunities and the subsequent execution of the project plan for each property are essential to the firm’s growth and ongoing success. Its professionals work in many remote locations evaluating properties for acquisition. The acquisition process is extremely complex and document intensive, and requires the involvement of many members of the Red Mountain team and their professional advisors.

After a property is acquired, it is important to track all aspects of the development or renovation processes and associated costs. Once the development or renovation is complete, Red Mountain often sells the properties to provide capital for future projects. The life-cycle for each project is different, yet needs to be carefully managed and scrutinized to insure that goals and targets are being met.

The Principals

Troy Saxton-Getty, a consultative CIO for Red Mountain Retail Group, has led the efforts to develop a Web-based collaboration environment. Aaron Fulkerson and Steve Bjorg are the co-founders of MindTouch. They have led the efforts to develop a robust open source solution with sophisticated training and support capabilities.

Meeting the Challenge: Organizing Documents

For Red Mountain to be successful, its team of professionals needs to be empowered to make important decisions in a timely fashion. These decisions and the myriad set of related documents must be carefully recorded and easily found. Accountability for plan execution and change management for each property rests with a principal site manager, who is designated as the “workspace author.”

Saxton-Getty offers, “The workspace is a centralized place to publish, share and collaborate around information that is commonly lost in the old paradigm of 'File Folders'. What makes the workspace stand out so well as a replacement to the 20 year old concept of putting files in a shared folder and losing track of them is the richness that surrounds the experience, such as who published it, what date and time, you can publish documents and files with the same name it keeps revisions so you always know what the most current version is yet you can look back to older versions with ease. The workspace also brings together small and large teams who can collaborate around a concept, for example a commercial real estate property area, a page for each property, all related documents and information are very easily published into the area and connected to the specific subject such as spreadsheets, documents, photographs, comments and team discussions. The workspace is finally a very easy to use replacement for the old file folder at the operating system level.”

Red Mountain selected MindTouch’s Deki because of the robust functionality and the ease of implementation. The Deki workspaces have the security features necessary to safeguard the myriad types of sensitive and secure information (including rich media) contained within each location’s documents. Team members with appropriate permission can create or modify wiki pages and thus ensure that colleagues always have access to the most up-to-date information. And with the embedded wiki functionality, team members can always roll back a wiki page to see a prior version of the information, if need be. The wiki workflows are easily configured to mimic and simplify existing “real-world processes.”

Troy Saxton-Getty had previous experience deploying MindTouch technology and selected it for this implementation because:

- It offers much of the functionality found in more-expensive products for a much lower fully implemented cost per user.
- It is browser independent and operating system agnostic.
- All functionality is delivered through the browser. No product installation is required.

- Deki is fully integrated into the Microsoft Active Directory and thus requires no separate user names and passwords. It is also very easy to manage passwords and change the access profiles of users.
- The search engine is fast and accurate, making it easy for even non-technical users to find key information or specific documents.
- Deki can be implemented off-the-shelf in as little as two hours without IT support. This compares with months of IT support that Troy's team required to implement the previous generation of solutions.
- Because it is open source, the technology itself is essentially free, and Red Mountain pays only for training and support.

Results: Simplifying Information Exchanges

The new collaboration environment has significantly simplified the exchange of information and made the entire organization more efficient.

- Deki has been valuable in tracking and communicating changes to the original project plan.
- Red Mountain users now have better access to sensitive documents and confidential information while improving security and version control.
- The search engine has helped users rapidly locate key information and documents located anywhere in the system.

Lessons Learned

- Less is more — The elegant simplicity of MindTouch's Web 2.0 solution offered Red Mountain the best value, with outstanding performance and reliability.
- The collaboration environment reduced the involvement of central office personnel and made the onsite team more accountable for all content and transactions under their control.
- Workspaces have replaced their e-mail systems as the primary communication venue. And more importantly, content and data are now stored in the workspace rather than as e-mail attachments.

Gilbane Group Conclusions

- Open source collaboration solutions are very credible and reliable. Due to the suggestions and contributions from their large user base, they are adding new functionality far faster than many of the larger and more-expensive products.
- The ease of deployment coupled with less reliance on IT makes these solutions very appealing to organizations of all sizes.
- Collaboration technology is particularly valuable to highly distributed organizations, as it helps them navigate across time zones and around the sporadic availability of key team members.

Near-Time at O'Reilly Media

Collaboration and Community for Publishers

Background: Reader Participation

On February 11, 2008, Near-Time and O'Reilly Media announced the prepress launch of Apprenticeship Patterns: Guidance for the Aspiring Software Craftsman on the Near-Time platform. The site (apprenticeshippatterns.oreilly.com) features the entire book contents and includes interactive components powered by Near-Time. Software Craftsmanship: Apprentice to Journeyman is a forthcoming title from O'Reilly Media, authored by Dave Hoover and Adewale Oshineye. The corresponding site is designed to enrich the content by encouraging reader participation through forums, commenting, and other interactive features. Reader feedback and updates to the content will drive content development before the book goes to print.

Near-Time (www.near-time.com) is a Web 2.0-based service that gives organizations a way to transform themselves via scalable, location-independent interaction, knowledge, and content. Its solutions are interactive and enable professionals to work together in powerful new ways. From prospects to customers, suppliers to partners, authors and publishers to readers, Near-Time offers strategic advantages and new opportunities. It provides "just-in-time" interaction and content for increasingly virtual and distributed workgroups and organizations.

O'Reilly Media (O'Reilly) (www.oreilly.com) spreads the knowledge of innovators through its books, online services, magazine, and conferences. Since 1978, O'Reilly has been a chronicler and catalyst of leading-edge development, homing in on the technology trends that really matter and spurring their adoption by amplifying "faint signals" from the alpha geeks who are creating the future. An active participant in the technology community, the company has a long history of advocacy, meme-making, and evangelism. O'Reilly continues to concoct new ways to connect people with the information they need. Long the information source of choice for technologists, the company now also delivers the knowledge of expert early adopters to everyday computer users.

The Challenge: Connecting with the Audience

O'Reilly Media has established itself as perhaps the most innovative publisher of technology books. The O'Reilly team is continually exploring new methodologies for developing and circulating high-value content to readers with a personal or professional interest in cutting-edge technical topics.

Because collaboration technologies and communities are playing a more prominent role in the strategies of innovative companies, the O'Reilly editors are seeking to increase the involvement of their target audience in the development of new content

products via pre-publication reviews and content contributions. While O'Reilly editors are technically savvy, they are the first to admit that they are not software developers and therefore have chosen to partner with a select group of software developers that have a specific expertise in content technologies.

The Principals

Allen Noren is O'Reilly's Vice President for Online and Digital Initiatives. Since 1992, he has forged an impressive strategy for developing and delivering O'Reilly content to readers using the Web and numerous media delivery platforms. Reid Conrad and Lee Buck are Near-Time's co-founders. Building on their experience in helping to develop the XML standard and their extensive experience in helping publishers select and implement high-quality technology solutions, they have developed collaboration technology that is particularly valuable to publishers.

Meeting the Challenge: Collaborative Authoring

In his quest to keep O'Reilly at the forefront of online digital publishing, Allen Noren evaluated collaboration platforms and selected Near-Time for the following reasons:

- The Near-Time wiki is optimized for collaborative authoring. It allows the editors and authors to assign specific roles and permissions to each participant and has outstanding change tracking and version-control functionality.
- The blog authoring engine is simple and straight-forward.
- The new Forum feature is very robust and allows O'Reilly to:
 - Streamline discussions and Q&A
 - Link to and integrate with wikis and blogs
 - Follow the flow of discussions including quoting and direct replies.
- The new Connection feature extends interactive publishing onto mobile devices. Space members can access content and participate in the ongoing discussions directly from their smart phones (iPhone, BlackBerry, Treo, etc.).
- Near-Time has been very responsive to O'Reilly's suggestions for new features, including support for e-commerce and print-on-demand.

Results: Promising Contributions

NearTime provides O'Reilly with an integrated collaborative environment, delivered as an outsourced service, as shown in Illustration 5.

The overall project is very new and has been enthusiastically embraced by editors, authors, and participants. Several participants who were previously unknown to the authors have emerged as significant contributors. It is simply too early to measure book sales and revenues from all aspects of the product launch.

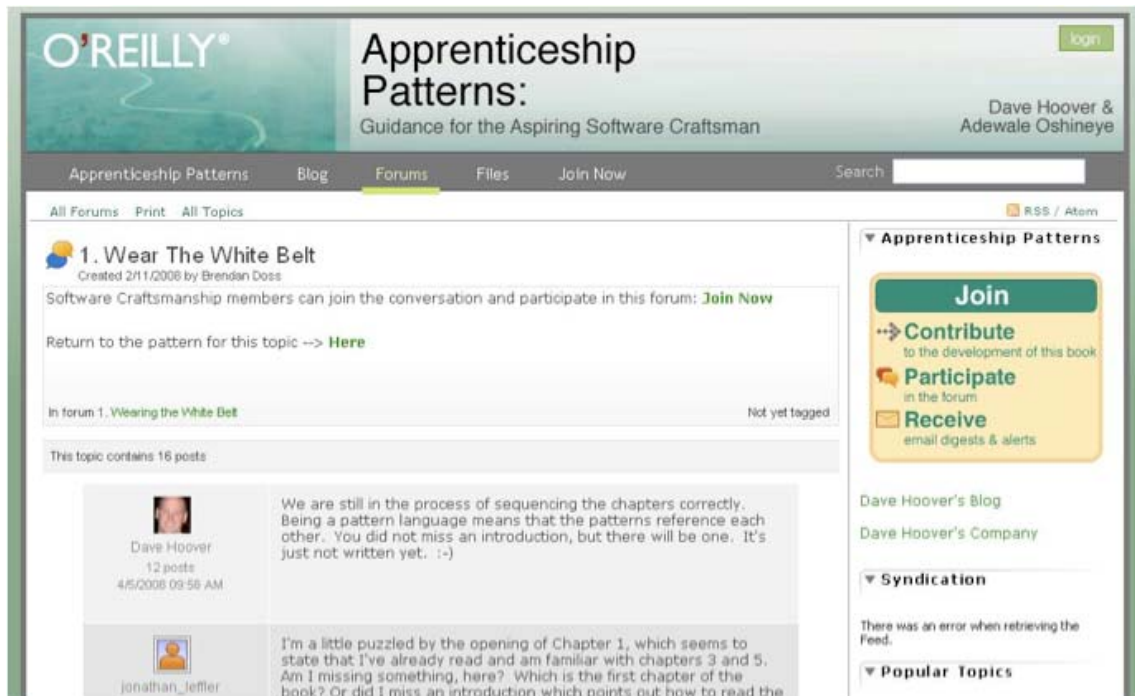


Illustration 5. Near-Time

Near-Time provides O'Reilly with an integrated collaborative environment.

Lessons Learned

- The ultimate goal is to generate new revenue streams. The team is evaluating the relative value of each content element, with an eye to charging for the highest-value elements.
- Digital product offerings will be offered with a variety of revenue models, including subscriptions, out-right purchases, sponsored, and/or advertising-supported content.
- O'Reilly will make their content available on all popular platforms, including cell phones, dedicated readers such as Kindle, browser-based Web content apps, and search engines.
- Collaborative authoring probably works best with compendiums of solutions or specific tips such as the O'Reilly cookbooks and hackbooks. These books are less reliant on a single logic stream and benefit from many people contributing good ideas and tips.
- There are many occasions when an editor is unsure whether there is a sufficient market for developing a traditional book product. A wiki/forum environment allows publishers and potential authors to clarify their ideas while defining the market opportunities.

Gilbane Group Conclusions

- Collaboration and community technology yields the greatest value when optimized for specific vertical markets. Domain expertise is very valuable to customers.
- The publishing industry is an excellent candidate for collaboration technology because it depends on finding the best ideas and expressing them with the greatest clarity.
- Peer reviews and forums can help authors eliminate errors and improve their writing styles.
- Communities can be used to search for new product ideas and to find experts who could become authors or co-authors. Some ideas might reside in communities while waiting for a sufficient market to develop.

Octopz at The Cundari Group

Supporting Creative Professionals and the Way They Work

Background: Rich Media Collaboration

Octopz describes its Web conferencing solution as “the next generation of online collaboration technology that is built specifically to support the way that creative professionals work.” By allowing colleagues throughout the world to meet without leaving their offices, it is possible to have virtual discussions to enable mark-up, modification, and approval of creative content. The environment supports many types of media, including videos, audio, animations, Flash files, 3D models, and 360° panoramas. The system is highly user-friendly and makes it easy to invite anyone with an email address to participate instantly.

The Cundari Group Ltd. (Cundari) is one of Canada’s largest communications agencies. They partner with clients to develop and deliver a broad range of creative programs. Established in 1980, The Cundari Group’s large list of clients includes respected brands such as BMW, Four Seasons Hotels & Resorts, ROM, RONA, Subway and National Car and Truck, Borden Ladner Gervais, CIBC Run for the Cure, Adrien Gagnon, and Festival Nouveau Cinéma.

The Challenge: Connecting around the World

Cundari’s creative professionals work with clients around the world on a wide variety of creative communication initiatives. Cundari’s services include advertising, promotions, CRM, branding/design, interactive, in-store displays, and point-of-purchase. The firm seeks to use technology to improve the quality of interactions with clients while reducing the necessity for in-person meetings. Online sessions are especially effective for plan execution and require no costly travel time.

The Principals

Aldo Cundari, the CEO of Cundari Group Ltd., has led the efforts to change and improve his company’s client management technology and procedures. Ron McKenzie, the CEO of Octopz, together with co-founders Barry Fogarty and Paul Nykamp, leads the team that developed and implemented the Octopz online collaboration technology.

Meeting the Challenge: Real-time Sharing

Aldo Cundari was immediately impressed when he saw the Octopz online collaboration tools for the first time. Unlike other Web conferencing products, the Octopz solution is optimized for creative professionals. Octopz is based on Adobe Flash and Flex, and thus readily supports the multiple media types used by creative agencies — including high-resolution images, rich media, and 3D models. With a

data architecture designed to maximize efficiency, content can be rapidly downloaded, in real time.

Octopz includes an integrated workflow capability for easily linking the flow of work among the multiple people working on a client project and provides annotation and version control features that are very valuable in reducing the time and effort required for remote teams to work together. Octopz has fully integrated support for text messaging, VoIP, and webcams, with no additional software or licensing required.

As can be seen in Illustration 6, team members at Cundari Group use Octopz to collaborate online in real time (synchronously), as well as to log in and work separately (asynchronously). They are able to work together in an iterative fashion, with meetings persisting from one session to another. Participants can continue to access and review content even when they are not connected in a live meeting.

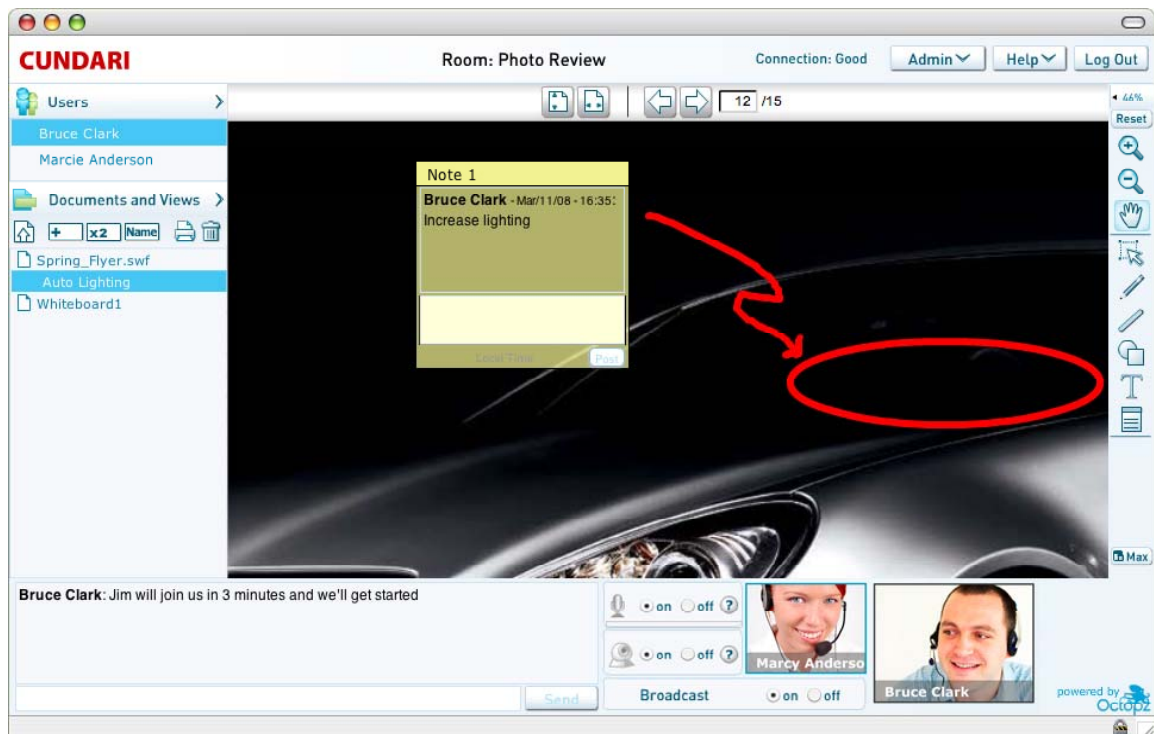


Illustration 6. Octopz

Octopz supports real-time sharing of rich media across a distributed environment. Participants see one another, view a common rich media source, and annotate it as part of their real-time meetings.

Real-time collaboration using Octopz

For Cundari Group, the ideal account management strategy includes the appropriate blend of face-to-face meetings with online collaboration. Strategy sessions are always conducted “in person,” while online collaboration has proven

superior for the implementation of the communications plan. Video cameras help make online meetings feel more personal.

Results: Accelerating Time-to-value

Through the implementation of the Octopz collaboration technology, Cundari Group has helped clients significantly reduce the time required to resolve implementation and execution issues, resulting in faster time-to-market for all aspects of each client's communication program. The time and cost economies of reduced travel allow for more time to be devoted to the creative process. Client communication and overall satisfaction have become even better.

The Octopz technology helps document annotation, changes, and client acceptances and is now used for preparation and transmittal of project files. It is considered to be vastly superior to relying on overnight couriers and e-mail to send and receive large media files.

An unexpected benefit of implementing the latest online collaboration tools has been the attraction of the best and brightest new employees. This generation of "digital natives" wants to work with the most leading-edge collaboration technologies and prefers an innovative corporate environment, giving Cundari Group a big advantage.

Lessons Learned

- Communication remains a vital ingredient of the agency-client relationship. Online collaboration increases the frequency of personal interaction and reduces misunderstandings. All participants in the execution process appreciate the capability to make annotations and modifications instantly. The Octopz collaboration process documents all comments and changes and enhances the corporate memory for developing future campaigns.
- The bigger challenge was to change behaviors within both the Cundari team and their clients' creative organizations. The Collaboration platform was piloted in small groups and spread "virally" throughout the entire Cundari organization; once the team got used to the new collaboration environment, they were enthusiastic about the benefits.

Gilbane Group Conclusions

- Collaboration applications are becoming an essential element of all content businesses.
- The highest value is derived from collaboration technology that is optimized for specific vertical applications. The workflows and procedures help organizations derive immediate benefits from the collaboration process.
- Communication processes and work-flows will often require updating or modification but will result in better and simpler interactions among team members, resulting in fewer misunderstandings and fewer mistakes.

Collaboration and Social Media: Customer Stories

- The greatest benefits are derived when all parts of the content-creation processes are reconsidered to take advantage of online collaboration capabilities

SAP Builds Communities of Innovation

Supporting a Development Platform

Background: Enhancing Core Competencies

SAP, the world's third-largest software company, is best known for its wide range of business software products. In 2002, building on its success as an enterprise software vendor, the company began to make the strategic transition from a products company to an applications company with a developers' platform.

SAP introduced NetWeaver, an applications development platform that helps organizations to rapidly develop new business solutions based on SAP enterprise applications and thus derive additional value from their existing IT investments. As the foundation for an enterprise service-oriented architecture (enterprise SOA) and a business-driven technology approach for greater flexibility and improved cost efficiencies, SAP NetWeaver enables the evolution of an organization's current IT landscape into a strategic environment that drives business change.

The success of SAP's communities has been extraordinary, and the capability to build, manage, and empower communities has become one of SAP's most important core competencies.

The Challenge: Connecting with External Developers

For NetWeaver to become a successful platform, SAP had to build relationships with software developers throughout the world. This new strategy made it necessary for the company to make its content, technology, and internal experts available to developers, with the goal of building better solutions through collaboration. For this strategy to succeed, the entire company had to go through a cultural change to support increased openness and communication across corporate boundaries.

Meeting the Challenge: Building a Community

Because the first goal was to reposition SAP as a developer's platform, the SAP Developer's Network (SDN) was built using primarily SAP technology. SAP employees were encouraged to start dialogues with outside developers via blogs, wikis, and customer forums. Many of the early discussions covered product and project ideas, as well as requests for help with technical issues. SAP contributed much of the early content in the form of case studies, demos, and training. As participation grew, so did the proportion of peer-to-peer interactions. While SAP remains involved, community participants determine their own directions.

Reaching Out to Business Process Experts

Based upon the positive response from developers, SAP launched BPX, a network for business process experts. This forum allows developers and business process consultants to collaborate around creating industry best practices. BPX now serves twenty-four vertical markets ranging from consumer products to oil and gas to defense, as shown in Illustration 7.



Illustration 7. SAP Business Process Exchange

The BPX home page organizes relevant information and links for the business process expert community.

Building Strategic Communities of Innovation

The strong performance and high customer value attributed to SDN caused SAP executives to rethink their customer-facing strategy by designing new communities to serve even more customers. Therefore, the focus for current community efforts has shifted to creating the path to fully enabled business processes that empower business networks and provide a foundation for flexibility and speed, resulting in greater business agility.

The Communities of Innovation at SAP are focused on customer value, and continue to operate across corporate boundaries. Illustration 8 shows how SAP connects and partners with customers through several phases of their business processes.

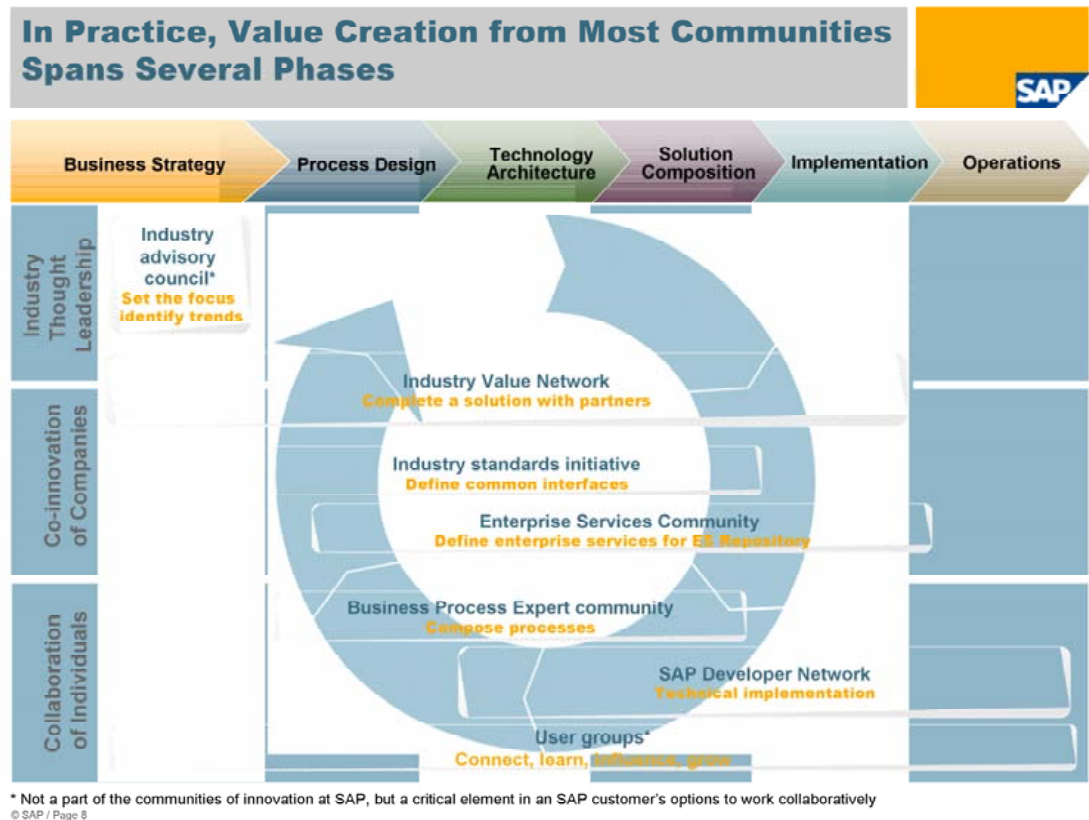


Illustration 8. Phases for SAP communities

SAP connects and partners with customers through several phases of their business processes.

Communities of Innovation — A full range of business collaboration environments

It is impressive to witness the evolution from a developer's network to an integrated set of communities that focus on identifying trends, developing solutions with partners, guiding the development of industry standards, defining enterprise services, bringing together experts to define processes and best practices, supporting developers during implementation, and building and supporting groups of users.

Results: The Centerpiece for External Efforts

In less than five years, SDN and BPX have become the centerpiece of SAP's external communication and collaboration efforts.

- Membership in the networks has soared to more than one million developers, business process experts, and executives.

- Currently, more than 25,000 are signing up each month. In 2007, the number of page views was 150 million; that was more than double the page views served in 2006.
- The number of forum posts now averages 6,000 per day, and 60,000 wikis are deployed to handle FAQs and ongoing discussions. If a developer asks a technical question or requires support, he or she will usually receive an answer from another community member within sixteen minutes. Over the next 24 hours, two or three additional responses will refine the initial suggestions and follow up to assure that the problem has been adequately solved. This aspect of the network is extremely popular because it saves developers time and it also reduces SAP's support costs.

The range of benefits for community members have become more comprehensive while continuing to offer practical tangible outcomes:

- Collective intelligence and co-innovation help discover issues and solve problems much faster than any single company could.
- Collaboration allows for faster development of well-integrated end-to-end solutions.
- Peer-to-peer interactions in a diverse environment increase the value of technology investments in a shorter timeframe.

Lessons Learned

- Building a successful community is half art and half science. The art aspect means allowing the community to have a personality and sense of humor. The goal is for the community to be self-policing and self-coaching. Although members will sometimes make negative comments, most contributions are positive and constructive. Tolerance of criticism coupled with affirmative responses adds to SAP's credibility with their customers. The science is in finding large groups of community with common interests and providing information and solutions to problems that cannot be found anywhere else.
- Moderation and training skills are important, especially when launching a community. Finding the right topics and starting each discussion with some rich information and dedicated expertise accelerates the growth of the community. Because 60% of the bloggers are not SAP employees, training is very important. SAP started out with a "junior blogger" program that served as the training ground for new bloggers. That program has now been replaced by behind-the-scenes coaching from community moderators.
- Recognition is the most powerful incentive for community participation. Community members can earn 3-12 points for providing timely answers to questions and up to 40 points for blog posts. These points help them earn the esteem of their colleagues and can result in free or discounted trips to SAP user conferences.

- Community participation sharpens the skills of developers as they strive to provide concise and accurate responses to difficult technical questions.
- Openness and inclusiveness are hallmarks of SDN, BPX, and Communities of Innovation, as they allow participation with only minimal signup requirements.
- Searchability — by general and specific topics, posters and their popularity, vertical markets, date of posting, etc. — is an essential part of the community interface. Nonetheless, other members prefer to browse new entries as part of their daily routine.
- Monetization of the success of these communities has come in the form of increased attendance of SAP user conferences and regional forums. The presentations at these events are captured in video and are available as a subscription service for those not able to attend.
- The improved communications and spirit of collaboration have drawn customers closer to SAP and improved their loyalty.

Gilbane Group Conclusions

- Building successful communities requires expert moderators. It is rare that an untrained moderator will stimulate the best interactions and results from a broad group of participants.
- SAP has been successful in changing its strategy and its image. By using community to reinforce a brand initiative, SAP is now considered a leader in responsiveness and customer focus.
- Successful online communities often start with a single task but evolve to serve as models for tackling a broader range of business opportunities and challenges.

Links:

To find out more about SAP Communities of Innovation go to:

<http://www.sap.com/usa/ecosystem/communities/index.epx>

To find out more about SDN and BPX, go to: www.sdn.sap.com

Wetpaint at Hewlett Packard

Listening to the voice of the customer

Background: Beyond the Printer

Hewlett Packard (HP) has long been the leader in the desktop printing market. The company delivers multiple printing technologies and printers for every type of printing need and budget. It is now developing a set of Web-based printing services to meet the needs of individuals and small businesses and is reinforcing its brand identity in the process.

The Challenge: Reinforcing the Brand

The Internet continues to change the face of common applications. Most people who commonly use the Internet have realized that printing Web pages or the output of Web applications is not as simple and straightforward as might be assumed. And many individuals and small businesses are finding new uses for printers based upon their favorite Web applications.

Rather than simply marketing the specific features and functions of various printers, HP seeks to emphasize the solutions behind its brand and to create an active dialogue with individuals and small businesses about their printing needs, and to allow printing enthusiasts to share their best ideas in an interactive online forum. Building and supporting an online community has real branding potential — fan power, in turn, is expected to generate awareness that contributes to the bottom line.

The Principals

Rob Wait, the Director of Marketing — Imaging and Print, is responsible for developing the programs to build awareness and brand loyalty. He and his team launched a \$300 million campaign in June 2007, with the theme “What do you have to say?” HP designed the campaign to better understand how consumers and small businesses are using their printers. Integral to this campaign was an effort to build community around HP printers and allow people to share their innovative ideas about how they use their printers.

HP turned to Wetpaint to provide the tools and technologies to support the online community. Headquartered in Seattle, WA, Wetpaint is an easy-to-use wiki platform that delivers the best aspects of blogs, social networks, and message boards for consumers and businesses. Having launched over 50 partner sites, Wetpaint has extensive experience with large consumer applications.

Meeting the Challenge: Engaging Customers

Most marketing campaigns focus solely on talking to the customer. This HP campaign, by comparison, developed a dialogue with the customer. As shown in Illustration 9, HP designed a campaign with multiple media and customer touch-points working together to reinforce a common set of interactions and customer experiences.

The emphasis is not simply to build awareness through advertising campaigns and marketing communications. The campaign also includes engaging customers in a digital experience through online conversations that are designed to build community. Customers share information with one another through an interactive Web site, based on a Web 2.0 platform, as shown in Illustration 9.

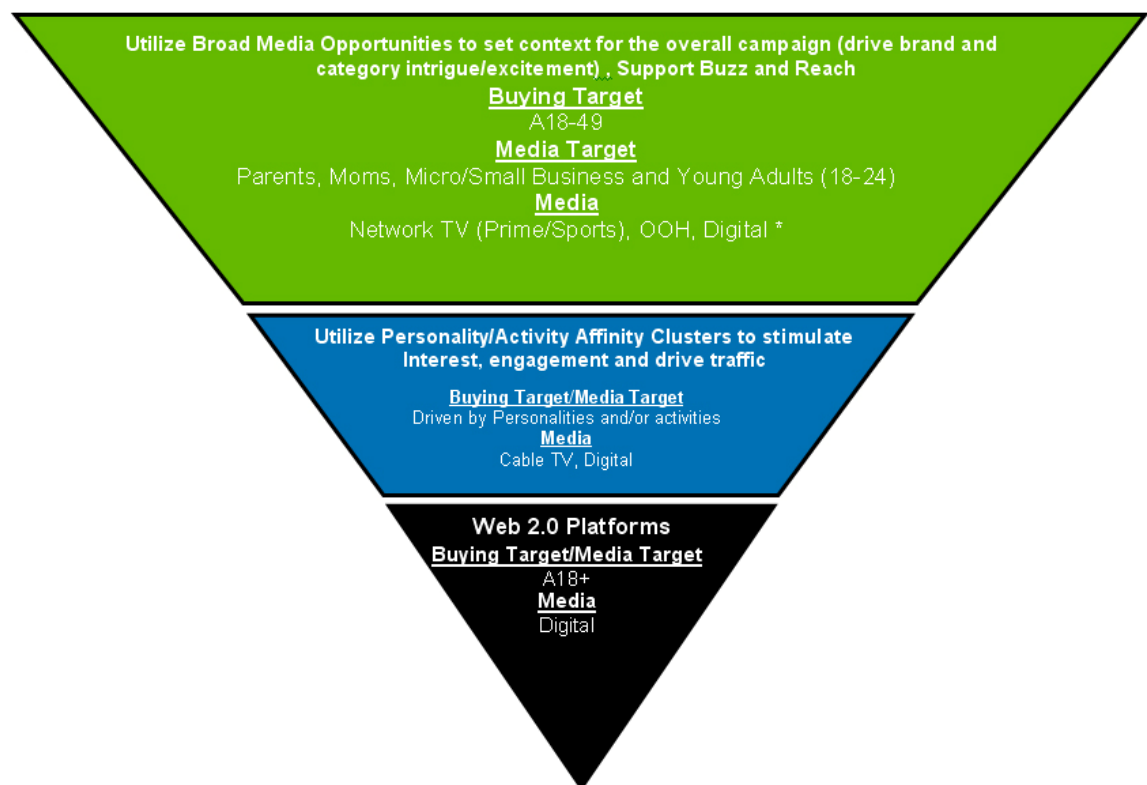


Illustration 9. HP Branding Strategy

HP designs a campaign with multiple media and customer touch-points working together to reinforce a common set of interactions and customer experiences.

As can be seen from the diagram, HP's approach to this campaign takes the form of an inverted triangle. Before it is possible to listen to customers, it is necessary to create a communications framework and then to publicize its existence. The top section of the diagram describes the broad media efforts to publicize the "What do you have to say?" theme. The middle section of the diagram refers to the use of known celebrities, such as Gwen Stefani, to create interest within specific targeted

groups and to drive traffic to the interactive touch-points represented by the lower section of the diagram.

At the tip of the triangle is where the customer interaction is most profound. Wiki technology is ideal for developing dialogues. Therefore, it is through the wiki application that most ideas are shared and most feedback received. HP is encouraging people to share their passion for printing. The company is focusing on consumers and small businesses, as they have often been the source of some of the best ideas for printing applications.

HP considered many possible vendors and found that Wetpaint provided an affordable, easily implemented technology platform to support the customer wiki. As shown in Illustration 10, the look and feel of the HP wiki is very engaging yet polished and elegant.

The screenshot shows the WetPaint Wiki homepage. At the top, there's a navigation bar with links for 'HOME & HOME OFFICE PRINTING' and 'SMALL & MEDIUM BUSINESS PRINTING'. Below this is a search bar and a 'Welcome to Our Wiki' section. The main content area is divided into several sections: 'Top 3 reasons to join and contribute', 'Find Great Ideas, Tips, Articles and More', 'Community Showcase', 'HP Video', and 'New to Wikie?'. The 'Community Showcase' section features three featured articles: 'Pioneer Woman Recipes', 'Printable Shrinky Dinks!', and 'New! Crafting with HP'. The 'HP Video' section features a video of Marcy. The 'New to Wikie?' section provides links for new users. The 'New from HP' section promotes 'The Tools of Creativity'.

Illustration 10: WetPaint Wiki

HP's "What Do You Have to Say?" Wiki produced using the WetPaint Platform.

All content is developed using familiar desktop applications — no HTML coding is required. And the wiki page is printable with no extra commands. HP found Wetpaint to be an excellent development partner who readily and easily supported HP's stringent data standards.

Results: Gaining Customer Insights

Supporting communities and building brand loyalty through user-generated content works well. HP is delighted with the quantity and quality of the real-time behavioral feedback that they are able to analyze regarding the impact of their multifaceted campaign. HP is able to regularly tune the campaign, thereby deriving far more return on their advertising dollars.

As a result, HP is gaining greater insights about how consumers and small businesses actually use printing technology and what features they desire to support their passion for printing. The company can now better understand how the Internet is changing the way that people are using printing technology.

Lessons Learned

- Rob Wait pointed out that the wiki element was certainly not the most expensive part of this huge campaign, but he labeled it as the “secret sauce.” It was the element that gave HP the best consumer feedback while generating excellent content and ideas.
- Rob and his team were surprised about topics that did and did not interest HP customers. They hired a person with a journalism background to help refine the topics and develop links to other Web sites. They have also encouraged HP employees to contribute content.
- The celebrities generated both publicity and controversy. While some customers noticed them and would listen to their advice, others wondered what celebrities really knew about innovative printing solutions.
- HP inadvertently upset design and print firms by offering templates for such items as business cards, stationery, and brochures. The wiki helped identify these concerns and helped several groups within HP form their response and re-engage these important partners..



Vendor Directory

Sponsors

Awareness



Company Background: Awareness (www.awarenessnetworks.com) helps companies build and operate branded Web 2.0 communities. These online communities let customers, prospects, employees and partners connect with each other and share content. At the core of the Awareness solution is an on-demand social media platform that combines the full range of Web 2.0 technologies — blogs, wikis, discussion groups, social networking, podcasts, RSS, tagging, photos, videos, mapping, etc. — with security, control, and content moderation. Awareness builds these features into complete communities for companies or customers use the Awareness API and widgets to integrate Web 2.0 technologies into their own Web properties.

Target Markets: Companies, government agencies, nonprofit firms, and educational groups seeking to build internal- and external-facing online Web 2.0 communities.

Products and Services: Awareness helps organizations build and operate branded Web 2.0 communities by providing an Enterprise Social Media platform, together with services for designing and hosting their communities and expert guidance about best practices. Its platform combines user-generated content (including blogs, wikis, threaded discussions, photos, and rich media sharing) and social networking (e.g., profiles, expert location, member searching, etc.) with enterprise security and control. The Enterprise Social Media platform is developed as a single architecture and built for enterprise deployment, with scalability security, single sign-on, identity management, and APIs for integrating with enterprise applications.

Awareness is delivered as an on-demand, software-as-a-service, offering — one that is optimized for high-volume, high-availability, Web 2.0 traffic patterns. Awareness works with its customers to develop and maintain online communities by providing design, creation, integration, and data migration services. It offers continuing advice on the design and launch phases of building an online community, as well as on techniques and policies for sustaining participation over time.

Customers: Major corporations such as McDonald's, Kodak, the New York Times Company, Northwestern Mutual, JetBlue, and Procter & Gamble use Awareness to

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build brand loyalty, generate revenue, drive new forms of marketing, improve collaboration, encourage knowledge-sharing and build a “corporate memory.”

Contact:

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OR

Eric Schurr, Vice president, Marketing

Eric.schurr@awarenessnetworks.com

781-622-2388

EMC Corporation



Company Background: EMC Corporation (www.EMC.com) is the world's leading developer and provider of information infrastructure technology and solutions that enable organizations of all sizes to transform the way they compete and create value from their information. EMC delivers products and solutions to help organizations design, build, and manage flexible, scalable, and secure information infrastructures.

With these infrastructures, organizations are able to intelligently and efficiently store, protect, and manage their information so that it can be made accessible, searchable, shareable, and, ultimately, actionable. The EMC information infrastructure provides the foundation for implementing information lifecycle management strategies, securing critical information assets, leveraging content for competitive advantage, and more.

Target Markets: EMC works with organizations around the world, in every industry, in the public and private sectors, and of every size, from startups to the Fortune Global 500. Their customers include banks and other financial services firms, manufacturers, healthcare and life sciences organizations, Internet service and telecommunications providers, airlines and transportation companies, educational institutions, and public-sector agencies.

Products and Services: EMC Documentum eRoom is an easily adopted, Web-based collaborative workspace that enables distributed teams to work together more efficiently. With Documentum eRoom, project teams around the world can accelerate and improve the development and delivery of products and services, optimize collaborative business processes, improve innovation, and streamline decision-making. With embedded information rights management capabilities that are part of eRoom, content that is developed in the workspace with customers, suppliers, and partners is protected, even after distribution beyond the firewall.

Customers: Partners Healthcare, DLA Piper, Washington Group International, Corporate Express, Dow Corning, the FDA, Reed Elsevier, Nikon, Renesas, The Well Project, Airbus, and Alteon, A Boeing Company.

Contact

EMC Corporation
176 South Street, Hopkinton, MA 01748

866-438-3622
softwaresales@emc.com

Mindtouch



Company Background: Founded in 2005 and based in San Diego, Calif., MindTouch (wiki.mindtouch.com) is an open source wiki platform company. MindTouch delivers a state-of-the-art application integration and development platform. MindTouch Deki, built with a Web Oriented Architecture (WOA), enables users to connect teams, enterprise systems, Web services, and Web 2.0 applications with IT governance. Users easily access and organize data and systems efficiently to achieve their business objectives.

Target Markets: MindTouch is committed to delivering next-generation solutions to people, businesses, and governments. Its wiki communities are deployed by small to large enterprises, research institutions, government agencies, media companies, and online communities worldwide.

Products and Services: Deki is an open source wiki that raises the bar for Web 2.0 collaboration by delivering an extensible platform for ad hoc information sharing. MindTouch adds the "2.0" into the enterprise by enabling users to hook in legacy applications and social 2.0 applications for mashups, while enabling IT governance.

Deki is an easy-to-use and sophisticated wiki for authoring, aggregating, organizing, and sharing content. Deki is also a platform for creating collaborative applications, or adding wiki capabilities to existing applications. Deki provides dynamic report templates, situational applications, and customized interfaces to a variety of legacy systems. It features an integrated search engine, based on Lucene.

Deki is built entirely on a RESTful architecture and engineered for concurrent processing to make APIs not just interoperable, but intelligently orchestrated to be in concert — thus creating multistep or multifunctional mashups. Deki is also a polyglot wiki, capable of effectively distinguishing between different languages within a single system.

Customers: Burnham Institute, City of Los Angeles, United States Army, Intel, Mozilla, Department of Defense, Gazette Communications, EMC, Expedia.

Contact

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Near-Time



Company Background: Near-Time (www.near-time.com) is an Enterprise 2.0 company that provides a collaboration and community platform, delivered on-demand as a software-as-a-service (SAAS) offering. Thousands of organizations in over 40 countries leverage Near-Time's integrated Wikis, blogs, forums, and social networking to develop best-in-class relationships with their customers, partners, and markets.

Leveraging a standards-driven architecture, Near-Time delivers a best-of-class platform for group interaction, and features both content integration and services interoperability. Near-Time facilitates ad hoc collaboration for members of any organization, using any system, running any browser — desktop, PDA, or iPhone. Near-Time's integrated approach brings teams together with the Web and empowers group discovery.

Target Markets: Near-Time focuses on four primary market segments:

- Corporate: Web 2.0 collaboration for building best-in-class relationships with customers, partners, and suppliers.
- Publishing & Media: Building community and monetization of content.
- Business Clusters: Interactive communities that transform the way people discover, share, and make decisions.
- Academic & Non-profits: Web2.0 collaboration platform for building community and interactive discussions.

Near-Time is available on monthly and annual subscription bases. Typical plans for enterprises range from \$5,000 to \$10,000 annually.

Products and Services: Near-Time provides an interactive community and publishing platform. Near-Time integrates popular Web 2.0 tools and technologies, including blog, wiki pages, team events, and shared files, in a hosted and secure collaborative environment. Near-Time provides services to authors and editors who produce content for distribution and allows them unlimited access by readers and commentators. In addition to supporting access rights based on roles, Near-Time features tools to customize an interactive environment, as well as file attachments, domain mapping, forums, analytics, task management, data encryption, and search engine optimization.

For content owners and publishers, Near-Time features a turnkey e-commerce solution, providing the ability to monetize content using roles and permissions to

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pay for content. Content owners and publishers can charge people who join their space, and change the amount they pay based on the membership roles or levels.

Customers: BlueCross BlueShield of North Carolina; CB Richard Ellis; O'Reilly; Netscout; US Department of Labor.

Contact

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NearTime

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Octopz



Company Background: Octopz Inc. (www.octopz.com) develops innovative collaboration technologies for creative professionals. With fully integrated support for text messaging, VoIP, and webcams, Octopz allows colleagues and partners anywhere in the world to work together securely in real time, or individually at their own convenience, using multiple document types.

Team members can then save and archive their work for subsequent retrieval, review, and feedback. The result is accelerated decision making and speed-to-market — a significant competitive edge.

Target Markets: Creative professionals working in enterprise or SMEs in the following industries: marketing, advertising, interactive agencies, architects, product designers, game designers, artists in entertainment and media, and educational institutions with a design focus.

Products and Services: Offered on a software-as-a-service (SaaS) basis, Octopz enables up to five people to synchronously view and mark up wide range of documents including digital media — such as images, audio, video, and animations — and to communicate via built-in text, voice, and video chat. (An upcoming release will support twenty-five participants.) Octopz uniquely includes the ability to upload, manipulate, and mark up 3D models.

Octopz uses intuitive navigation and tool icons and requires nothing more than a Flash-enabled Web browser. In addition, Octopz can be integrated (via Flash, APIs, and Web services) with existing applications. Octopz will be able to share the screen display of a running application in a future release.

Market Reaction: Octopz launched at Web 2.0 Expo 2007, where CNET named it one of the "Top Five" Web 2.0 services. Since then, Octopz has been identified as a 2007 rising star by InfoWorld, selected by Red Herring as one of the ten hottest startups in Canada, named one of Canada's Companies-to-Watch as part of the 2007 Deloitte Technology Fast 50 Awards, recognized as a Branham 300 "Top 25 Up and Comer," and chosen as the Canadian Innovation Leader by CIX (Canadian Innovation Exchange), and has been a finalist in the Webware 100 awards two years in a row.

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Customers: Aldo Cundari, The Cundari Group, Alastair MacLeod, Ontario College of Art and Design, Ashok Saini, Transcontinental Inc.

Contact

Ann Christie
Vice President, Marketing
Octopz, Inc.
416.673.8187

SAP AG



Company Background: As one of the world's leading providers of business software, SAP (www.sap.com) delivers products and services that help accelerate business innovation for its customers. Over 46,100 customers in more than 120 countries run SAP applications — from distinct solutions addressing the needs of small businesses and midsize companies to suite offerings for global organizations. By using SAP solutions, organizations reduce costs, improve performance, and gain the agility to respond to changing business needs.

SAP has developed the SAP NetWeaver technology platform, which enables customers to achieve more value from their IT investments.

The success of SAP's communities has been extraordinary, and the capability to build, manage, and empower communities has become one of SAP's most important core competencies.

Target Markets: SAP targets a wide range of organizations, including financial and public services, manufacturing, aerospace and defense, chemicals, automotive, consumer products, life sciences, oil and gas, media, telecommunications, professional services, travel and logistics, utilities, and wholesale and distribution.

Products and Services: SAP offers a variety of communities and resources to enable customers, partners, and individuals to connect and collaborate. SAP sponsors communities that seeks to foster collaboration among individuals, including:

- *Business Process Expert community* — Bridges the gap between business and IT by engaging diverse members in moderated forums, wikis, and expert blogs to drive process innovation through collaboration, best-practice sharing, and collective learning.
- *SAP Developer Network (SDN)* — Enables over one million members to co-innovate in a robust, highly collaborative environment using discussion forums, blogs, wikis, software and tools downloads, e-learning, and specially designed programs.
- *Diamond technical community* — Provides a variety of sites with resources that can help members develop solutions using software from Business Objects, an SAP company. Members receive free trial downloads, training and certification, and the latest information from the community's developer conference.

SAP supports collaboration among companies through such efforts as:

- *Industry value networks* – Bring together leading-edge independent software vendors (ISVs), technology vendors, and systems integrators (SIs) with SAP and customer companies. Industry value networks focus on information sharing to enable superior innovation and multivendor alignment of business, development, and go-to-market plans.
- *Enterprise Services Community (ES Community)* – Enables more than 300 leading customers and partners to collectively define the next generation of enterprise services, which SAP builds and then makes available to their entire ecosystem of partners and customers.

Customers: Companies and organizations participating in SAP communities include Siemens, City of Dortmund, Tesoro, Wipro Technologies, Infosys Technologies, Colgate-Palmolive, Adobe, and Florida Department of Revenue.

Contact:

Gail Moody-Byrd
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WetPaint



Company Background: Wetpaint (www.Wetpaint.com) is a leading social publishing platform with over 950,000 sites created since its launch in June 2006. Companies implement custom Wetpaint sites to engage their most active and knowledgeable users and to build branded experiences.

Wetpaint is changing the way people share and collaborate about passions and interests online through its consumer-friendly wiki platform. Anyone who knows how to use Microsoft Word can use Wetpaint to click and type online, or to add rich media (such as photos, audio tracks, and links to full-motion videos) to their online environment.

Target Markets: Entertainment, technology, and lifestyle brands seeking to build customer loyalty through interactive, customer-generated content and experiences.

Products and Services: Wetpaint provides a social publishing platform, delivered on a software-as-a-service (SaaS) basis, to subscribing firms and their customers. Wetpaint combines wikis, blogs, forums, and social networks so anyone can click and type on the Web.

By fusing intuitive publishing tools with social networking features, Wetpaint-powered sites increase user connection and communication. End users can quickly and easily create a Web site that flourishes with interaction, discussion, and collaboration, resulting in rich content that attracts new members and bigger audiences.

Wetpaint appears either as a branded yet self-contained set of Web pages, or (through its Wetpaint Injected service) as in-context, embeddable components and feeds within existing page displays.

Customers: WetPaint works with major brands such as Dell, the Discovery Channel, Fox, Hewlett Packard (HP), HTC, Oracle, and T-Mobile.

Contact

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Zoho



Company Background: Zoho (www.zoho.com) a division of AdventNet, develops a comprehensive suite of affordable, online collaborative, productivity, and business applications. Zoho has launched 17 different applications, and more are in the works. Through a software-as-a-service (SaaS) deployment, Zoho makes it easy for individuals and businesses to manage all their work while dramatically reducing their costs of software purchases and business operations. Zoho seeks to make working online not only more rewarding, more collaborative, and more profitable, but also more enjoyable.

Zoho has received numerous awards, including a 2008 PC WORLD 25 Most Innovative Products Award for Zoho Notebook and “Best Enterprise Start-up” at The 2007 Crunchies. Nearly 200 developers work on the Zoho suite. Zoho is a global company with diverse reseller and implementation partners from around the world, committed to delivering innovative solutions and comprehensive support in multiple languages.

Target Markets: Zoho targets individuals, students, educators, nonprofits, and small and medium-sized businesses who seek Web-based business applications.

Products and Services: Zoho provides a suite of 17 online applications (services) that customers access on demand over the Web. Applications include personal productivity (Writer, Sheet, Planner, and Show), collaborative (Chat, Wiki, Mail, and Meeting), and business (CRM, Projects, Invoice, and DB & Reports). Zoho applications are free for individuals; some have a subscription fee for organizations.

Zoho stores its customers’ documents and data securely “in the cloud” on its own servers, running within its own data centers. This means that as long as customers have Internet access, they can access their documents and data from any computer, and enjoy a productive, convenient work experience without the hassle of bringing along a computer. Zoho also helps people collaborate on projects and share information through accessing the online repository.

Zoho supports mixed online and offline access and use for word processing, spreadsheets, and business presentations through support of Microsoft Office document formats. Zoho provides a plug-in for creating, editing, and saving documents and spreadsheets directly from within Microsoft Word and Excel. Zoho supports “offline” mode for some of its applications (such as Writer) so that customers can work in their browsers even when not connected to the Internet, and synch up when back online.

Vendors

adenin TECHNOLOGIES, Inc.

Address: 101 Federal Street, Suite 1600, Boston, MA 02110

URL: www.adenin.com



Year founded: 1999

Public/private: Private

Sales email: sales@adenin.com

Sales phone number: (800) 975-6096

Product offerings: Intranet portal suite

Target markets: IntelliEnterprise is an Intranet 2.0 for organizations creating a social, agile, and truly collaborative enterprise. The intranet portal suite delivers a highly interactive environment to make collective intelligence more accessible. With more than 100 modules, applications, and tools, IntelliEnterprise embraces openness, distributed organization structure, knowledge transparency, user-driven information flow, and simple management by the users. The result is a complete suite that mid-sized to large multinational organizations around the world are using to deliver a vivid intranet that liberates their employees and delivers increased innovation, productivity, and agility. The company is headquartered in Boston and Nuremberg, Germany.

Atlassian

Address: 375 Alabama Street, Suite 400, San Francisco, CA, 94110

URL: www.atlassian.com/software/confluence



Year founded: 2003

Public/private: Private

Sales email: sales@atlassian.com

Sales phone number: (415) 701-1110

Product offerings: Enterprise wiki

Target markets: Atlassian Confluence makes it easy to collaborate and share knowledge. It includes all the features typically found in wikis, plus enterprise-level security, attractive WYSIWYG, full-text search, an open API for extension and integration, and more. Confluence is available either behind the firewall or hosted (SaaS).

History and Background: Atlassian is a five-year-old company with over 9,000 customers in more than 90 countries. Atlassian Confluence is the world's most popular enterprise wiki, with more than 4,500 corporate, government, and nonprofit customers of all sizes and industries.

Announced Customers: Adobe, Airbus, BMW, Citicorp, Genentech, Harvard Business School, Microsoft, Nike, Pfizer, Shell, Sony, State University of New York, World Bank.

Attensa, Inc.

Address: 111 SW Fifth Avenue, Suite 2260, Portland, OR 97204

URL: www.attensa.com



Public/private: Private

Sales contact name: Rich Rudolph, VP Sales

Sales email: sales@attensa.com

Sales phone number: (503) 973 6060

Product offerings: Attensa RSS Readers, Attensa Servers for Workgroups and the Enterprise, Attensa RSS Network Infrastructure.

Target markets: By intelligently analyzing information about RSS articles and how readers are interacting with the articles, the Attensa RSS network can deliver more relevant, timely information to individuals on the devices they choose, and businesses can take advantage of RSS technology to streamline communication with employees, partners, and customers. Every day, millions of pieces of metadata are being generated by RSS news feeds from Web sites and blogs. RSS metadata can include information about an RSS news feed article such as the title, author, and date of creation. It can also include information about how users are interacting with the information by tracking which specific articles are being read and which articles are being ignored or deleted.

Background: The Attensa RSS network is based on unique, proven intellectual property in a scalable RSS architecture that efficiently organizes, distributes, and measures RSS news feed articles and their associated attention metadata. Using the Attensa network attention streams that accommodate the Attention.xml standard, metadata is unobtrusively fingerprinted and triangulated through collaborative filtering to deliver the most relevant information. By sharing, aggregating, and triangulating the attention streams (anonymously and in near real time) generated by the millions of people using RSS feeds, new possibilities emerge to provide individuals with higher-value content. This metadata can be used to rank the popularity of articles by measuring the audience size and appetite for news from specific bloggers and news sources. It can also be used to create privacy-protected anonymous user profiles, based on permission, that can recommend content, refine blog and Web site searching and enhance the experience of tracking the news that matters to millions of people.

Blogtronix, LLC

Address: 220 Bush St, Suite 950, San Francisco, California 94104

URL: www.blogtronix.com



Public/private: Private

Sales contact name: Richard Walton VP Business Development

Sales email: sales@blogtronix.com

Sales phone number: (877) 256-4876

Product offerings: Enterprise blogging platform

Target markets: Blogtronix Enterprise offers secure Enterprise 2.0 blogs with wikis, RSS, document management, CMS, communities, and corporate social networking built on the Microsoft .NET 2.0 architecture.

History and Background: This service provides a complete solution for corporations looking to improve their internal project collaboration and external public and client relations through online communities. Their package includes a robust collaboration platform that can be tailored to fit a corporation's departmental structure and can be designed to match the look and feel of the company's Web site. Included are an innovative "group based network," hosted RSS feeds, a wiki, corporate social networking, user rights management, video and audio blogging, flash support, and a variety of administrative tools such as analytics and corporate compliance engine to monitor content. Blogtronix Enterprise provides tight integration through Active Directory for a single login.

Clickability

Address: 130 Battery Street, Suite 300, San Francisco, CA 94111

URL: www.clickability.com



Year founded: 1999

Public/private: Private

Sales contact name: G. William Lohr, III Senior VP of Sales and Service

Sales email: sales@clickability.com

Sales phone number: (866) 276-4580

Product offerings: Web content management

Target markets: Clickability offers a pure-play SaaS platform for the entire Web content lifecycle, from content creation to optimization. Clickability was among the first to build a software-as-a-service for publishers of content on the Web. Clickability's offering is the first and only commercially available, single-instance, multitenant, Web-based content management service on the market.

History and Background: Clickability is leading the development of a software-as-a-service platform for Web content management. Through passionate customer service, innovative technology, and strategic partnerships, Clickability enables customers to reduce costs, increase revenues, build brands, and foster stronger customer relationships. Founded in 1999, Clickability is privately held and headquartered in San Francisco.

Announced Customers: CNN, The Wall Street Journal, The Star Tribune Company, Philadelphia Media Holdings LLC, Gray Television, and Amcor.

Collanos Software Inc.

Address:

URL: www.collanos.com



Year founded: 2003

Public/private: Private

Sales contact name: Matteo Fabiano, Head of Marketing and Business Development

Product offerings: Shared workspaces

Target markets: Collanos Workplace is an integrated team collaboration platform supporting shared workspaces. Within minutes, users can share documents, have online discussions, and manage tasks, all in a single, consolidated space. Built on reliable peer-to-peer technology, Collanos Workplace software allows employees to work anywhere, anytime, both online and offline. Collanos Phone adds voice, video, and multiprotocol IM services to the platform. Phone and Workplace use the same user identity and share the same global community. Both Collanos Workplace and Collanos Phone are supported on all leading operating systems: Microsoft Windows, Mac OS X, and Linux.

History and Background: Collanos is a startup that focuses on the collaboration needs of teams who demand a secure, cross-platform, on- and offline, and serverless solutions. By leveraging open-source technologies, open standards, and a global development model, Collanos provides home and business users with a strong team-based solution that combines the benefits of classic client/server, Web, and peer-to-peer architectures. Collanos was founded in November 2003 and has offices in San Francisco and Zurich, Switzerland.

Announced Customers: Collanos provides team solutions for non-enterprise users. More than 10,000 customers are using Collanos' solutions today. Case studies and user quotes can be found on the Web site.

Communispace

Address: 100 Talcott Avenue, Watertown, MA 02472

URL: www.communispace.com



Year founded: 1999

Public/private: Private

Sales contact name: Jeff Meleski, Senior Vice President, Sales

Sales phone number: (617) 607-1400

Product offerings: Online customer communities allow customers (and prospects) to be involved and heard, letting them help with every decision — big or small. Communispace's strategy and full-service capabilities offer a pragmatic and direct way to genuinely listen to customers and hardwire their voices into a company's business strategy.

Background: Since 1999, Communispace has created and managed more than 300 online customer communities to help clients deeply engage with, and listen to, customers in ways that deliver extraordinary insights, generating phenomenal business results. They enable companies to operationalize what it really means to be close to the customer throughout their organization by offering full-service community capabilities — from strategic planning and design to member recruitment to expert facilitation and customer insights and analysis reporting.

Selected Announced Customers: AARP, Hewlett-Packard, Hilton, Intel, Best Buy, Kraft Foods, Capital One, Meredith Corporation, Nestlé, Charles Schwab, Novartis, PepsiCo, Colgate-Palmolive, Reebok, Scholastic, Sprint, Nextel, TJX Companies Inc., Unilever, Hallmark, Verizon Wireless.

CoreSpeed LLC

Address: 3655 Brookside Parkway, Building 2, Suite 400, Alpharetta, GA 30022

URL: www.corespeed.com



Year founded: 1994

Public/private: Private

Sales contact name:

Sales email: info@corespeed.com

Sales phone number: (678) 872-9950

Product offerings: Community and social media

Target markets: A unique blend of expertise maximizes organizations' sales, marketing, and enterprise initiatives with appropriate technologies and services. CoreSpeed's seasoned sales and marketing, technology, and management consulting professionals, together with select affiliate representatives, provide a strong backbone of support to assist their clients in consistently exceeding their goals.

CoreSpeed also helps organizations scale by enhancing existing capabilities with just the right products and services. Therefore, whether an organization needs cost-effective technology or a complete turnkey solution that combines technology and services, the right solution can be provided.

History and Background: A privately held, diversified company, CoreSpeed LLC obtains products and technologies through internal development, acquisition, and affiliation. These solutions, some in the marketplace since 1994, provide CoreSpeed with a rich history of capabilities.

Announced Customers: Sears, BMC Software, CPI Group, ChicksAway.com, StubHub, Energy Education, Georgia Tech Economic Development Institute, Arch Chemicals, LeisureLogix, HotelsbyHospitals, Solutionz Group, Richard Ellis, John Wieland Homes, NTR Global, Intech Software, Banner Direct, Datran Media, Interactive Media Transport, ERC, SITT Asset Management, Jekyll Island Authority, Tec Labs, Marathon Media, Grande Communications, Artlux, Total CAD Systems.

CustomerVision

Address: 515 N 2nd Street, Des Moines, IA 50047

URL: www.customervision.com



Year founded: 2003

Public/private: Private

Sales contact name: Cindy Rockwell CEO

Sales email: sales@customervision.com

Sales phone number: (877) 824-0181

Product offerings: Business wiki

Target markets: CustomerVision makes customers' lives easier by providing the power of a Web 2.0 enterprise wiki with the ability to mash up content, knowledge and document management into an easy and intuitive Web-based solution.

History and Background: CustomerVision has been in business for 5 years delivering enterprise wiki solutions to Fortune 500 companies, small to medium-sized businesses and non-profits. Their background in enterprise organizations provides an understanding unparalleled by most software companies today.

Announced Customers: CDS-Global, Channel Bio, a division of Monsanto, Tenacity, Corporate Executive Board

Daptiv, Inc.

Address: 1008 Western Avenue, Suite 500, Seattle, WA 98104

URL: www.daptiv.com



Year founded: 1997

Public/private: Private

Sales contact name: Christian Smith, VP of Sales and Marketing

Sales phone number: (888) 621-8361

Product offerings: Collaboration and shared workspaces

Target markets: Daptiv's on-demand collaborative business software enables companies of all sizes to transform their mid-office business operations across projects, departments, and teams. From new product development to operations and services delivery, Daptiv streamlines employee collaboration across departments and dramatically reduces the complexity of managing multiple projects and tasks. Daptiv allows employees, team leaders, business managers, and executives to work more effectively and more intelligently.

History and Background: Founded in 1997, Daptiv is an on-demand leader in collaborative business software that enables companies of all sizes to transform their mid-office business operations. From new product development to operations and service delivery, Daptiv's on-demand solutions streamline employees' day-to-day interaction and collaboration while dramatically reducing the complexity of managing multiple teams, projects, and tasks. Daptiv also gives executives unparalleled visibility into project, program, and portfolio execution, as well as the ability to measure progress against key business priorities. Daptiv's flexible environment easily adapts to the work management needs of any department — from IT and finance to marketing and human resources — with an intuitive user interface, point-and-click system configuration, and fast creation of forms, reports, and alerts. Based in Seattle, Washington, Daptiv has already transformed the mid-office for more than 700 customers.

Announced Customers: BASF, BP, Cushman and Wakefield, Chase Paymentech, Honeywell, Merrill Lynch, Sprint/Nextel, Blue Cross and Blue Shield of Kansas City, and RealNetworks.

eTouch

Address: 6627 Dumbarton Circle, Fremont, CA 94555

URL: www.etchouch.netsamepage.spwiki.com



Public/private: Private

Sales phone number: (510) 795-4800 Option 1

Product offerings: Enterprise wiki

Target markets: SamePage is an enterprise-grade wiki available in both the SaaS and on-premises models. Its WYSIWYG editor is coupled with enterprise-ready features like LDAP integration, SSO, granular security, and more. SamePage includes Web 2.0 features like wikis, blogs, forums, and plugins. The product is fully supported and customizable using eTouch's team of engineers and consultants.

History and Background: An industry leader in the Web 2.0 industry, eTouch provides cutting-edge solutions through SamePage. Today, SamePage's footprint extends across Fortune 500 companies, SMBs, and universities —improving the lives of hundreds of thousands of knowledge workers globally.

Announced Customers: NASA, Citrix, Beckton Dickenson and company, Alcatel-Lucent, ITG, Hestia, Siemens, Teradyne, and Association Forum of Chicago.

FatWire Software

Address: 330 Old Country Road, Suite 207, Mineola, NY 11501

URL: www.fatwire.com



Year founded: 1996

Public/private: Private

Sales contact name: Ken Delaney, VP of North American Sales

Sales email: sales@fatwire.com

Sales phone number: (800) 801-8504

Product offerings: Web experience management/collaboration

Target markets: FatWire Software helps organizations put content to work by deploying highly persuasive content-centric applications and Web sites. Organizations in financial services, manufacturing, retail, media/entertainment, telecommunications, healthcare, and government use FatWire's solutions to improve sales, customer service, partner effectiveness, and employee productivity. FatWire's solutions are powered by Content Server, which combines complete business user control over the creation and presentation of content with a scalable architecture for dynamic content delivery and multisite deployment. Unlike other content management solutions that focus on getting content under control, FatWire's solutions enable organizations to put content to work by delivering highly targeted and persuasive experiences to customers, partners, and employees. FatWire provides the technology, methodology, and experience for enterprises to achieve rapid success by starting with a single, low-risk initiative and scaling to hundreds of applications and sites over time.

Background: FatWire's methodology provides a "Clear Path to Success." To ensure that initial projects are implemented rapidly and cost effectively, FatWire provides sample applications, templates, components, and best practices that companies can adapt to the needs of their specific projects. With that first initial success under their belt, companies can take advantage of the more sophisticated capabilities that increase the effectiveness and persuasiveness of the application. FatWire then helps companies build a center of excellence that allows them to extend usage of the platform to support the needs of large numbers of business units and applications across the organization.

Foldera

Address: 2952 Daimler Street, Santa Ana, CA 92705

URL: www.foldera.com



Year founded: 2001

Public/private: Private

Sales contact name: Ken Lloyd, VP Sales and Chief Marketing Officer

Sales phone number: (714) 766-8700

Product offerings: Shared workspaces

Target markets: By using Foldera to organize and share information, companies can organize work automatically, in real time. There is no sorting, filing, and organizing to do after creating new information. Based on current productivity averages for people who work with information all day, Foldera saves search users approximately two to four hours every week.

One of the biggest challenges that teams face when collaborating is keeping everything in sync — making sure that everyone has access to the same, up-to-date information at all times. Foldera's real-time organization, version control, and commenting provides a secure information space that is always in sync, always up-to-date, and always accessible, regardless of where teams are working or the time of day it is where they are.

HiveLive

Address: 1731 Fifteenth Street, Suite 220, Boulder, CO 80302

URL: www.hivelive.com



Year founded: 2006

Public/private: Private

Sales contact name: Mike Rosol, SVP of Sales

Sales phone number: (303) 952-8818

Product offerings: HiveLive's on-demand software enables companies to rapidly deploy custom-fit enterprise communities built around people, their relationships, and their shared knowledge. The foundation of their patent-pending technology is a new Web 2.0 building block (called a Hive) that can be easily configured to function as a wide range of community applications (blogs, wikis, forums, FAQs, and more). With this platform, companies can connect to three community solutions: Customer Communities, which increase brand loyalty; Employee Communities, which increase organizational intelligence and innovation; and Partner Communities, which align goals and increase revenue.

Background: Forward-thinking companies have realized that online communities are a serious business tool. In fact, communities are rapidly emerging as the new interaction hubs where trust is built and knowledge is shared. Web 2.0 and social networks have enabled a whole new way of working, exploring, sharing, and learning. To compete in the twenty-first century, businesses must tap into the power of networks, freeing people to connect to one another in key ways that accelerate business performance and agility.

Huddle.net

Address: Ninian Solutions Ltd., Southbank House, London SE1 7SJ, U.K.

URL: www.huddle.net



Year founded: 2006

Public/private: Private

Sales contact name: Charles Blake Thomas, Commercial Director

Sales email: sales@huddle.net

Sales phone number: 0870 9772212

Product offerings: Intranet shared workspaces, social networking

Target markets: Huddle is a premier provider of social business networks that enable collaboration between companies, communities, and content through Enterprise 2.0 work tools. Huddle is a simple and secure service that combines the social platforms used with the hosted business solutions. Huddle allows instant creation of a network of collaborative workspaces, bringing together the right people for the right project.

History and Background: Founded in 2006, Huddle realized that despite rapid advances in technology, individuals and companies are still suffering from a wide range of obstacles to working together successfully. Huddle combines the simplicity and "organic" nature of social networks with the power of enterprise-level knowledge, document, and project management tools in a single, hosted Web-based application, delivering a unique collaboration and team-working network for small teams and large companies alike. Huddle is built and managed by Ninian Solutions Ltd., a software development company based in London, U.K., that creates online applications using the Microsoft .NET platform.

Announced Customers: Companies leveraging Huddle include Reuters, Edelman, and John Lewis.

Hyperwave Information Management Inc.

Address: 66 Tadmuck Rd., Suite 3R, Westford, MA, 01886

URL: www.hyperwave.com



Year founded: 1997

Public/private: Private

Sales contact name: Pieter Duijst, CEO

Sales email: pieter.duijst@hyperwave.com

Sales phone number: (978) 392-4200

Product offerings: Collaboration information management

Target markets: The Hyperwave CIM Platform is a suite of modular enterprise content management (ECM) applications incorporating content and document management, search and retrieval, workflow, collaboration, Web conferencing, and e-learning.

Background: Hyperwave is a leading provider of Collaborative Information Management (CIM) solutions with a fully integrated e-learning and Web conferencing environment. Hyperwave solutions help companies bring greater efficiency to their decision-making processes, make decisions traceable, and communicate them faster. All of these cross-industry and industry-specific solutions are based on a fully integrated basis platform. Such an integrated approach enables Hyperwave to execute ECM projects significantly more quickly and more efficiently than the market average. Worldwide, more than 300 customers with more than 600,000 users in the public and private sectors have chosen Hyperwave as a strategic partner.

Announced Customers: Audi, Fujitsu-Siemens, Toshiba, Telekom Austria, EADS, and Bahn AG.

JackBe

Address: 4600 North Park Avenue, Suite 200, Chevy Chase MD 20815

URL: www.jackbe.com



Year founded: 2001

Public/private: Private

Sales contact name: Jacques Jarman, VP of Worldwide Sales

Sales email: Jacques.jarman@jackbe.com

Sales phone number: (240) 744-7620

Product offerings: Mashup platform

Target markets: JackBe's enterprise Web 2.0 mashup platform combines SOA and Ajax into rich enterprise applications and mashups that deliver any data from any application to any user, while meeting the toughest enterprise-grade security and governance requirements. Presto enables desktop-like Web applications and enterprise mashups, while still maintaining stringent enterprise-class governance, security, and control. Presto leverages existing SOA and middleware investments to smoothly integrate internal and external services into browser-based enterprise applications.

History and Background: JackBe was founded by Luis and Jacob Derechin in 2001 to create a new generation of software tools that enable enterprises to improve the functionality and performance of Web applications. JackBe subsequently pioneered Rich Internet Application and deployed Ajax solutions for many large organizations using its Ajax Framework long before the term "Ajax" had even been coined. Today, JackBe is recognized as a market leader in the delivery of these technologies and services, and is renowned for the performance and rich functionality of its Ajax solutions in use by some of the world's largest enterprises.

Announced Customers: US Defense Intelligence Agency, Nutrisystem, Tupperware, Ademsas.

Jive Software

Address: 317 SW Alder St Ste 500, Portland, OR 97204

URL: www.jivesoftware.com



Public/private: Private

Sales contact name: Scott Campbell, VP Sales

Sales phone number: (877) 495-3700

Product offerings: enterprise collaboration

Target markets: Every day companies lose critical knowledge, ideas, and connections by not making it easy for people to get work done. Focused on this issue, Jive Software delivers "social productivity" software that brings together employees, partners, and customers into a unified collaboration system so they can create better products, faster processes, and improved relationships. This vision is validated by over 2,000 customers, including over 15% of the Fortune 500.

Announced Customers: BEA, Sun Microsystems, VMWare, University of Phoenix, PriceWaterhouseCoopers, Frito Lay.

Kapow Technologies

Address: 260 Sheridan Ave, Suite 420, Palo Alto, CA 94306

URL: www.kapowtech.com



Year founded: 1998

Public/private: Private

Sales contact name: Joe Keller, Chief Marketing Officer

Sales phone number: (800) 805 0828

Product offerings: Mashup platform

Target markets: Kapow Technologies is a market leader in mashup serving, feed serving and Web scraping software that enables companies to deploy content-intensive applications such as enterprise mashups and Web 2.0 applications at a fraction of the time and cost needed with traditional software methods. Because of its patented, unique visual scripting approach, Kapow Technologies is one of the fastest-growing software firms in the world, with more than 200 customers making Kapow Technologies their top choice for projects such as data collection, content migration, and the enablement of mobile applications and service-oriented architectures.

History and Background: Kapow Technologies A/S was founded in 1998 by CEO Stefan Andreasen and Ebbe Groes. The initial idea was to create the largest marketplace for cars, boats, and real estate in Europe, by collecting items for sale from the Web sites of all online car dealers, boat dealers, and real estate agents.

To do this, Kapow Technologies had to develop a new cutting-edge technology that could automate the collection process from several thousand Web sites, and at the same time ensure that all collected data were correct, i.e., car make, year, price, etc. By 2006, Kapow Technologies acquired its 200th enterprise customer, and the Kapow Mashup Server had become the de facto standard for collecting, connecting, and mashing up anything browsable on the Web. And through Kapow's patented visual scripting design scheme, Global 2000 companies and Web 2.0 startups are able to complete integration projects that were never before possible, at a fraction of the time and cost of traditional integration methods.

Announced Customers: APAC, Bank of America, BetBrain, Boehringer Ingelheim, Danske Bank, Deutsche Bank, Gatetrade, KDDI, Lycos, Penske, Skygate, USF, Ziggs.com, Zurich.

KnowNow

Address: 997 E. Arques Avenue, Sunnyvale, CA 94085

URL: www.knownow.com



Public/private: Private

Sales contact name: Paul Liddy, VP Sales

Sales phone number: (877) 561-KNOW

Product offerings: Enterprise Syndication Solution (ESS), KnowNow WordPress Enterprise Edition (KWEE), MediaTrak LIVE on Salesforce.com, Customer Intelligence for AppExchange

Target markets: KnowNow monitors and pushes live, relevant information to users, instantly. KnowNow's live information management solutions increase productivity and enable timely, profitable decisions for some of the most respected organizations in the world

Experience in developing, managing, deploying, and hosting solutions with leading Fortune 1000 enterprises has made KnowNow a leading provider in the enterprise RSS sector and a respected innovator in the information management industry.

History and Background: KnowNow was founded in 2000 with a vision of mobilizing and delivering the world's content in innovative new ways. Their technology was developed on the forefront of the Web 2.0 revolution and is notable for its unique publish-subscribe engine that eliminates response latency and its use of AJAX to create a highly flexible user interface. Recent awards include Best Enterprise Search Implementation” at the Enterprise Information Management Conference 2007, and the designation as one of the “100 Companies That Matter in Knowledge Management” by KMWorld magazine. Additionally, KnowNow Live won an audience vote as the “biggest game-changer” during the Launch Pad event at the Enterprise 2.0 Conference 2007.

Headquartered in Sunnyvale, Calif., KnowNow is privately held, with backing from premier venture capital firms, including Kleiner Perkins Caufield and Byers, Levensohn Venture Partners, Palomar Ventures, Presidio Ventures, and RSSInvestors.

Announced Customers: AMD, Bank of the West, BurrellesLuce, Cognizant, CSAA, First Republic Bank, Hewlett-Packard, IBM, Procter & Gamble, Sun Microsystems, Union Bank, Wachovia, and Wells Fargo.

Leverage Software Inc

Address: 150 South Park, San Francisco, CA 94107

URL: www.leveragesoftware.com



Public/private: Private

Sales contact name: Kate Swanson

Sales phone number: (415) 602-7060

Product offerings: Social networking and community solutions

Target markets: Leverage Software helps clients engage and learn from their single most important asset: their customers. Through an innovative suite of online community products, Leverage can help clients empower their customers to meet one another, build relationships, share ideas, collaborate, provide real-time product feedback, and tell companies exactly what's on their minds — twenty-four hours a day, seven days a week.

Leverage Software is the leader in enterprise-class social networking and online community solutions, powering communities for more than 150 companies in the technology, media, consumer and services industries. With a robust suite of functionality which includes personal profile pages, people-matching, blogs, chat, polling, RSS, discussion groups, file sharing, widgets, targeted advertising, and robust customer and community analytics, the Leverage Community Platform empowers companies to create online communities where people can meet, build relationships, contribute, and connect.

History and Background: Founded in 2003, Leverage Software Inc. is a leading provider of online community software and services for the strongest and most innovative brands in the world. Companies large and small are discovering new ways to engage, communicate, and connect with their customer base through the Leverage Community Platform. Their team comes from technology, media, financial, consumer, affinity, and services companies. This breadth provides them with a great understanding of how individuals and team most effectively communicate within groups.

Announced Customers: Apple, HP, Sun, Microsoft, Lucent, Oracle, Ingram Micro, Hilton, Salesforce.com, SAPCharles Schwab, Dwell, Amdoca, Autodesk, Dow Jones, IDG, InfoWorld, Informatica, AMA, Wind Rive, VNU, Web Methods, Cognos, McKesson, Ziff Davis, Citrix, Reuters, Fortune.

LiveWorld

Address: 4340 Stevens Creek Blvd., Suite 101, San Jose, California 95129

URL: <http://www.liveworld.com>



Public/private: Private

Sales contact name: Cheryl Paul, National Sales Director

Product offerings: Liveworld builds, operates, and moderates social networks and online communities with a difference that creates real solutions to meet real business goals.

Target markets: LiveWorld offers complete soup-to-nuts solutions, or modular services tailored to each client's needs. LiveWorld delivers a unique, integrated solutions focus, combining best-of-breed strategy, design, customization, hosting, end-user features, admin and moderation tools, reporting tools, moderation services, and community management.

Background: All communities form a culture, even if left to themselves. The best of them develop cultures proactively guided to engage the members, engage the company's brand ethos, and meet particular goals. An effective day-to-day relationship dynamic drives cost-effective organic growth, while ensuring that a brand is well represented and extended. Community management and moderation services define the environment, provide referent examples and leadership, and direct the content to reflect the company's focus.

Announced Customers: America Online, A&E Television Networks, AOL UK, BEA Systems, BlogSafety.com eBay, The Campbell Soup Company, Discovery Communications, Dove, Expedia, HBO, Hotels.com, Intel, Intuit Inc., MINI Cooper USA, QVC, Tulane University, and TV Guide.

Lithium

Address: 6121 Hollis Street, Suite 4, Emeryville, CA 94608

URL: www.lithium.com



Year founded: 1997

Public/private: Private

Sales contact name: Greg Joy, VP of Sales

Sales phone number: (510) 653-6800

Product offerings: Lithium's management hub provides all the controls for managing the client's community. Through a single, Web-based dashboard for all of Lithium's products, administrators monitor or manage all functions of the community, including permissions, user rankings, metrics, layout options, and abuse report management. The result is that non-technical administrators can perform many of the tasks traditionally managed by IT or developers, reducing operating costs and increasing agility. Lithium provides on-demand community solutions. Simply put, they perform the entire daily administrative and IT functions that the client's staff would otherwise need to perform. A hosted community must look and behave as though it originates on the client's site, and integration with the client's enterprise standards is crucial. Lithium's tools and technologies make this process simple, enabling the client to integrate with Lithium's products either through simple configuration or through more robust application programming interfaces (APIs).

Background: Lithium helps bring the client's customers together. Their suite of community tools gives customers a safe space to meet one another, solve problems, trade tips and techniques, or just speak their minds. As customers get close to one another, they get closer to the client.

Announced Customers: Follow this link to see a comprehensive list of Lithium's customers: <http://www.lithium.com/customers>.

MarketTools

Address: 150 Spear Street, Suite 600, San Francisco, CA 94105

URL: www.markettools.com



Year founded: 1997

Public/private: Private

Sales contact name: [Pamela Kramer](#) Chief Marketing Officer

Sales email: info@zoomerang.com

Sales phone number: (415) 957-2200

Product offerings: For an integrated, enterprise-wide research solution, zTelligence is a sophisticated, yet easy-to-use, Web-based tool that makes it easy to create, deploy, analyze, and manage online surveys — from simple surveys to complex, multilevel studies. With zTelligence, companies can build engaging surveys, deploy to any online sample base, and monitor results as they come in. zTelligence is a fully integrated solution built specifically for the market research community. With Zoomerang, clients can immediately create, distribute and analyze surveys online. Use the survey templates and tools to conduct accurate, comprehensive surveys with a minimum of cost and effort. Zoomerang is a simple, fast, and economical way to get feedback online. MarketTools offers online Custom Panels and Interactive Communities that give direct access to target audiences and a real dialogue with the most engaged customers. Companies can survey, interact with, and observe their customers through unique online communication tools that help explore ideas and gain authentic, in-depth insights.

Target markets: On-demand marketing research

Announced Customers: MarketTools' clients include 400 of the Fortune 500, as well as many small and medium-sized businesses and organizations.

Mzinga

Address: 154 Middlesex Turnpike, Burlington, MA 01803

URL: www.mzinga.com



Year founded: 1986 as KnowledgePlanet; in 2007, KnowledgePlanet and SharedInsights merged to create Mzinga

Public/private: Private

Sales contact name: Randy Saari, Senior VP, Sales

Sales email: LearnMore@mzinga.com

Sales phone number: 1-888-MZINGA8

Product offerings: On-demand learning, workplace communities, customer communities

Target markets: Mzinga's solutions enable companies to derive real value from their communities. KnowledgePlanet On-Demand Learning Suite includes the features needed in a learning community. KnowledgePlanet Live enables virtual classrooms and discussions. Firefly Publisher simplifies collaboration and teamwork among dispersed development teams. The Virtual Customer Center community enables customers to come together in a secure environment, learn more about Mzinga solutions, and learn from each other how they are using those solutions to solve their business needs.

History and Background: Shared Insights is focused on developing online communities for businesses while also spearheading groundbreaking projects like "We Are Smarter than Me," which used the power of Web 2.0 technologies and the wiki-based contributions of more than 4,000 people to create a book illustrating how businesses could profit from the wisdom of crowds.

Announced Customers: ABC, CBS, Fox, Amazon.com, Monster.com, Wharton School, Disney, American Express, HSBC, Cook Medical, Weightwatchers, John Deere, iVillage, Primedia, Chevron, Tenneco.

Neighborhood America

Address: 2210 Vanderbilt Beach Road, Naples, FL 34109

URL: www.neighborhoodamerica.com



Year founded: 1999

Public/private: Private

Sales contact name: Dan Miller VP Sales

Sales phone number: (866) 591-6837

Product offerings: Communities and social networks

Target markets: Neighborhood America enables businesses, media, and governments to build social networks at an enterprise level. The company's "software as a service" offering provides a simple solution to the universal problem of building sustainable communities that add value to an organization.

History and Background: Neighborhood America has been delivering enterprise social networks via the software as a service (SaaS) business model since 1999. They have provided solutions for some of the most challenging problems faced by world-class business organizations — challenges that require mission-critical solutions.

Announced Customers: ABC, CBS, Scripps Networks, the National Park Service, Reebok, and Adidas.

Networked Insights

Address: 131 W. Wilson Street, Suite 1001, Madison, WI 53703

URL: www.networkedinsights.com



Public/private: Private

Sales contact name: Daniel Neely, Founder and Chief Executive Officer

Sales email: sales@networkedinsights.com

Sales phone number: (608) 237-1867

Product offerings:

- Customer Insight Platform (CIP) — With the Customer Insight Platform, companies can mine their customers' conversations for the most relevant insights that can help companies in all areas of their business, including marketing, sales, and research and development.
- Customer Interaction Network (CIN) — The Customer Interaction Network supports the interactions between customers online. After quickly logging in, customers can browse and share a breadth of company information, products, other customers, specific questions, and related topics.
- Insider™ Chat — Without the commitment of logging in, the Insider Chat helps customers get answers to their questions, hear other customers' opinions, and share their knowledge without leaving the company's Web site.

Target markets: Online marketing research

Background: Networked Insights represents the shift from market research to customer-generated insights. They enable companies to engage with their customers on a continual basis to deliver relevant insights on the market, customer, and company in real time.

NewsGator Technologies, Inc.

Address: 950 17th Street, Suite 2500, Denver, CO 80202

URL: www.newsgator.com



Year founded: 2003

Public/private: Private

Sales contact name: Dave Miller General Manager Enterprise

Sales email: sales@newsgator.com

Sales phone number: (800) 608-4597

Product offerings: Enterprise RSS server, social networking

Target markets: NewsGator Enterprise Server helps organizations take news and updates from the Web, the blogosphere, premium content providers, and internal applications and systems and automatically deliver it to places where their employees can easily find and use it — portals, mobile devices, their desktops, or preset folders in Microsoft Outlook or Lotus Notes.

History and Background: Headquartered in Denver, Colorado, NewsGator Technologies Inc. was founded in 2003 and has raised \$18 million in venture funding to-date through investors such as Masthead Venture Partners and Mobius Venture Capital. NewsGator helps individuals and businesses improve the way they find information and communicate internally and externally through the wide range of award-winning RSS aggregation products and social media tools, including NewsGator Enterprise Server, named one of InfoWorld's 2007 Technologies of the Year and a Trend-Setting Product of 2006 by KM World. NewsGator has been named in the eContent 100 listing of "Companies that Matter Most in the Digital Content Industry" for four straight years and has also been chosen by AlwaysOn as one of the Top 100 Private Company award-winners.

Announced Customers: Proctor & Gamble; Rohm and Haas; General Atlantic; SpencerStuart; Biogen Idec; NorthwesternMutual; WatsonWyatt; Davis, Polk, & Wardell; National Health Care of Scotland (NHS).

ONEsite

Address: 14000 Quail Springs Parkway, Suite 3600, Oklahoma City, OK 73134

URL: www.onesite.com



Year founded: 2005

Public/private: Private

Sales contact name: Dax Cochran, Inside Sales Manager

Sales email: sales@onesite.com

Sales phone number: (405) 753-9300, ext. 135

Product offerings: Communities and social networks

Target markets: The ONEsite Platform offers a complete community experience with blogging, photo and video sharing, tagging, rating, flagging, commenting, built-in messaging, and groups built on patent-pending technology. They offer an extensible, flexible, scalable, and customized solution. The Widget and API libraries make it easy to integrate a ONEsite community with existing Web properties and search, registration, and authentication systems. ONEsite was built to serve as an extensible Web 2.0 platform capable of creating full-featured social networks as well as microsites. It has been used to power full communities for some of the largest media companies in the world, as well as on social media microsites for major companies.

History and Background: ONEsite is a leading provider of online community and social media solutions. They have a proven ability to deliver enterprise-class solutions for over 1,500 additional communities for media and entertainment clients, lifestyle brands, or affinity communities. The core technology, along with their talented and experienced team, allows ONEsite to launch a full-featured, customized, scalable online community on an aggressive timeline.

Announced Customers: Sprint/Nextel, Proctor & Gamble, Clear Channel Communications, Visa International, Univision Communications.

Open Teams LLC

Address:

URL: www.openteams.com



Year founded: 2007

Public/private: Private

Sales email: info@openteams.com

Product offerings: Collaboration, social networks, and blogging platforms

Background and Target markets: Business leaders are frustrated with email and groupware because they don't break through the bureaucracy — and usually create even more. In addition to project collaboration, blogging, social networking, community building, and knowledge management, OpenTeams is a development solution where employees collaboratively seed and mature new ideas for additional revenue, productivity, and cost-savings.

OpenTeams is intuitive for non-techies to learn and use. Its simple email-like interface makes it easy to create, organize, and navigate content while transparently tracking changes. This dramatically shrinks the learning curve and ensures adoption while ramping up productivity, payback, and employee engagement.

Pringo Networks

Address: 11835 W. Olympic Blvd., Suite 120, Los Angeles, CA 90064-1631

URL: www.pringo.com



Year founded: 2002

Public/private: Private

Sales contact name: Gregg Hall

Sales email: greg@pringo.com

Sales phone number: (800) 658-8298

Product offerings: Social networking platform

Target markets: Pringo Networks a leading provider of non-hosted and hosted, enterprise white-label social networking platforms for companies of any size.

History and Background: Los Angeles-based Pringo Networks was created in 2002 when two technology visionaries saw the potential of the Internet to be a gathering place for individuals worldwide to communicate and share common interests. After collecting thousands of domain names and building each site from scratch, the co-founders' idea was to create a scalable and fully extensible platform that would allow new features to be added without interrupting existing Web site functions.

Pringo currently has over 400 features and is continually adding new ones, all of which can be added to current or new Web sites, market-ready within weeks. The LA-based company offers a complete social-networking and media-sharing platform, enabling organizations to build integrated online communities around their existing user bases and reinforce branding. Pringo's consulting services help businesses create an aggressive online strategy to compete in a competitive market. A robust, third-party tracking system and traffic monetization tools provide a transparent, revenue-generating tool to help organizations flourish quickly on the Web.

Announced Customers: 11on11, 944 Magazine, Boomj, BuddyUniversity.com, jibspot, PCGCampbell/Yokohama Tires, Veternet.

Ramius

Address: 55 Metcalfe Street, Suite 530, Ottawa, Ontario, K1P 6L5, Canada

URL: www.ramius.net



Public/private: Private

Sales contact name: Simon Chen

Sales email: salesupport@ramius.net

Sales phone number: (613) 230-3808 (sales: ext. 241)

Product offerings: With CommunityZero® software from Ramius®, an organization can build secure, scalable online communities to engage its target audience and to improve business performance. Offered as a hosted service and validated by more than 2 million users, CommunityZero easily scales to support multiple communities with thousands of users. This means that clients can be confident that their communities can grow to meet their users' needs and the needs of their own business. CommunityZero currently supports engagement strategies and workflow processes for business-to-consumer (B2C) and business-to-business (B2B) companies, associations, and nonprofits.

Target markets: Ramius® Corporation delivers innovative social software for people and business. Their highly scalable, Web-based platforms make it easy for their customers to connect, communicate, and collaborate online in meaningful ways.

Announced Customers: Follow this link for a complete listing of Ramius Customers: <http://www.ramius.net/clients/>

SiteScape

Address: 12 Clock Tower Place, Suite 210, Maynard, MA 01754

URL: www.sitescape.com



Year founded: 1995

Public/private: Public (owned by Novell)

Sales contact name: Kevin Grygiel, VP Sales for the Americas

Sales email: info@sitescape.com

Sales phone number: (978) 450-2200

Product offerings: SiteScape Forum ZX, SiteScape Forum ST, SiteScape Zon, WebWorkZone

Target markets: SiteScape collaboration technology enables distributed teams in business, government, and the military to meet their most mission-critical requirements for sharing information across any boundary — organizational, geographic or temporal. The company's easy-to-use, Web-based solutions offer an ideal combination of scalability, security, usability, and flexible customization to meet customers' precise requirements.

History and Background: SiteScape provides collaborative solutions that specifically address the communication and program management needs of large and/or distributed teams in business, government, and military organizations. The company's integrated Web-based solutions meet enterprise requirements for knowledge management, project management, communities of practice, telework, business and government continuity, and many other workflow-driven functions. SiteScape's robust portfolio of PKI-enabled, 508-compliant solutions feature proven scalability, security, and ease of customization, and deliver rapid return on investment and very low cost of ownership to customers. SiteScape's flagship product, SiteScape Forum®, has a proven track record spanning nine years, seven major product revisions, and translation into 11 languages. SiteScape has recently been acquired by Novell.

Announced Customers: U.S. Navy, U.S. Centers for Disease Control, the European Space Agency, Lockheed Martin, Shell International, and Starwood Hotels and Resorts.

Socialtext

Address: 655 High Street, Palo Alto, CA 94301

URL: www.socialtext.com



Year founded: 2002

Public/private: Private

Sales phone number: (650) 323-0800

Product offerings: Enterprise wikis

Target markets: With flexible deployment options — including appliances, hosted services and open source software — Socialtext wikis are designed for any organization that wants to accelerate team communications, better enable knowledge sharing, foster collaboration, and build online communities.

History and Background: Socialtext was founded in 2002 and as the first wiki company; Socialtext leads the industry in applying next-generation Web 2.0 technologies to the critical challenges facing businesses. In fact, in the most recent Gartner Magic Quadrant for "Team Collaboration & Social Software," Socialtext was ranked as the most visionary vendor, and with a leading ability to execute on this vision.

Announced Customers: BASF, CondeNet, Epitaph Records, Humana, IKEA, Intel, MicroStrategy, MWW Group, Manning & Napier, Nokia, Ogilvy PR, SAP, Symantec, USA Today, and Washington Post, among others.

Techrigy Inc.

Address: 2 Northstone Rise, Pittsford, NY 14534

URL: www.techrigy.com



Year founded: 2006

Public/private: Private

Sales email: info@techrigy.com

Sales phone number: (585) 586-0160

Product offerings: Social media effectiveness management

Target markets: SM2 for the Blogosphere is a new tool designed to help track, measure, and analyze mentions in social media about a company, product, or person. SM2 provides the most comprehensive social media coverage that includes YouTube, Flickr, Wikipedia, del.icio.us, Twitter, MySpace, and over 100 million other sources. SM2 provides email alerts when mentions of specified keywords are made. In addition, SM2 provides robust capabilities to graph, filter, map, and analyze the results.

SM2 for the Enterprise will scan a company's network to find blogs and wikis running behind the firewall. SM2 helps protect against noncompliance and risk while aiding in inventory tracking, retention and e-discovery.

Background: Techrigy is pioneering the market for compliance and risk-management solutions for social media. Techrigy's products allow organizations to know what's being said on the blogosphere about their organization and to ensure that social media used inside the organization meet all compliance standards. Techrigy's SM2 provides an aggregate tool that enables organizations to monitor and track all its social media with one suite of tools. Ultimately, Techrigy helps organizations embrace social media and avoid liabilities.

Traction

Address: 245 Waterman Street Suite 309, Providence, RI 02906

URL: www.tractionsoftware.com



Year founded: 1996

Public/private: Private

Sales contact name: Jason Siegal, VP of Sales

Sales email: jason@tractionsoftware.com

Sales phone number: (703) 234-1898

Product offerings: Web sites, shared work spaces, news groups/forums, podcasts, RSS, social networking, wikis, blogs, mashups, social bookmarking

Target markets: Traction TeamPage is an Enterprise 2.0 suite combining wiki-style group editing, the simplicity of a blog, and a unique model for commenting and secure, scalable communication. TeamPage stands apart from groupware, blog and wiki competition with best-of-breed blog, wiki, discussion, social tagging, over-the-Web document management/versioning, search, and notification features.

Background: TeamPage squarely addresses the knotty communication and content management issues encountered by groups working alone or together, over time. In 2007, Traction TeamPage was named Best Enterprise Wiki in InfoWorld's Technology of the Year awards and was named a KMWorld Trend Setting Product.

Announced Customers: Ipsen Pharmaceuticals, Enel North America, National Health Service Orkney, ShoreBank, Department of Defense, In-Q-Tel (Venture arm of the CIA).

WebEx Communications, Inc.

(a Cisco Company)

Address: 3979 Freedom Circle, Santa Clara, CA 95054

URL: www.webex.com

Logo: The logo features a stylized globe icon to the left of the word "webex". The globe is composed of several colored segments (blue, green, yellow, red) and has a white highlight. The word "webex" is in a lowercase, sans-serif font, with "web" in blue and "ex" in green.

Year founded: 1996

Public/private: Public

Sales phone number: (877) 509-3239

Product offerings: Web conferencing

Target markets: WebEx creates on-demand software solutions for companies of all sizes. Their online meeting applications and software services help their customers all over the world fulfill their most ambitious goals for marketing, sales, training, and support. More than 3.5 million people use Cisco's WebEx products every month to communicate and collaborate online.

History and Background: WebEx began with a vision: to use the Web to bring people together from around the world to collaborate and work collectively on creative ideas and business. When WebEx was founded in 1996, emerging digital communications standards, such as ISDN and Switched Digital Service, led to the development of videoconferencing, a market which took off. Users were excited by the possibilities of extended learning, keynote events, and multimedia presentations combining live video and audio — without the time and expense of traditional conferences. When a client chooses WebEx, there's no need to worry about ports, platforms, versions, firewalls — or even the Internet. All the client needs to run effective online meetings is a browser and a phone. Collaborating with colleagues using WebEx solutions is as easy as point-and-click — making it effortless to meet with anyone, anywhere, at any time. With WebEx, users share presentations, applications, documents, and desktops, with full-motion video and integrated audio, all in a rich-multimedia environment. Today, organizations use WebEx meeting applications across many industries — including financial services, high-tech, healthcare, pharmaceutical, communications, manufacturing, government, and management consulting — and support every stage of both customer and product lifecycles, driving results in sales, marketing, fulfillment, product development, manufacturing, training, and support with real-time collaboration. Following the Cisco acquisition of May 25, 2007, WebEx products are being integrated into Cisco's expanding portfolio of next-generation collaboration products and services based on Web 2.0 technologies.

Worklight

Address: 275 Grove Street Suite 2-400, Newton, MA 02466

URL: www.myworklight.com



Year founded: 2006

Public/private: Private

Sales contact name: Ran Shribman, Director of Sales, EMEA

Sales email: info@myworklight.com

Sales phone number: (866) WRK-LGHT

Product offerings: Enterprise collaboration

Target markets: Making business personnel more productive by simplifying the way they interact with colleagues and enterprise applications at work. WorkLight uses application "adapters" to extract data from enterprise applications and other data sources. Adapters are provided for various common interfaces, such as SQL and Web Services, as well as for specific applications.

History and Background: The founders of WorkLight struggled for years with the poor user experience offered by corporate computing environments, while having fun at home with all the cool tools and applications available to the consumer. With the advent of Web 2.0 technologies and the pervasiveness of a whole new generation of Internet tools and Web services, this user experience gulf is widening even more.

WorkLight™ is a secure and scalable server-based software product that provides workers and consumers with a "Web 2.0-style" computing experience at work. Timely application information and enterprise social networking is provided securely through services and technologies such as RSS, Ajax, desktop and Web-based gadgets and widgets, personalized homepages, social bookmarks, application mashups, social networking tools (like Facebook), instant messaging, and more.

Announced Customers: Several global retail and investment banks, several utilities, large system integrator.

Zimbra (a Yahoo Company)

Address: 701 First Avenue, Sunnyvale, CA 94089

URL: www.zimbra.com



Public/private: Public — Owned by Yahoo

Sales email: sales@zimbra.com

Sales phone number: (888) 228-7609

Product offerings: Enterprise collaboration

Target markets: Zimbra is a leader in open source, next-generation messaging and collaboration software. ZCS integrates an entire organization's diverse desktop and application environments. For example, desktop users in Outlook can share their calendars with peers who use Apple iCal or Zimbra Desktop on Linux.

ZCS streamlines workflows and saves time. The browser-based AJAX client delivers a richer experience with a message conversation view and visual search builder that makes multigigabyte inboxes easier to use. Third-party applications are integrated as "mashups" via Web services, so users can view CRM data, maps, or anything else without leaving the context of a message.

Background: Zimbra Collaboration Suite (ZCS) was built with the belief that existing email and calendaring solutions are broken. The result is an innovative experience for end users and system administrators. ZCS uses open technology. The Zimbra Server is built with open technology and runs on Linux and Mac OS X; think of it as an open source Exchange alternative. The Open Source edition is free, and Zimbra also offers a Network Edition with Zimbra support.

Announced Customers: Comcast, Feedpath, Live prism, Synacor, Century 21, Ratheon, MySQL, Delaware St. Univ, UCLA, Ohio State University, Georgia Tech.



Gilbane Conclusion

Charting the Impact of Social Media

Here're our predictions about the future of collaboration and social media across the enterprise.

Tracking Five Trends

Our investigation blends a quantitative and qualitative perspective to highlight the widespread adoption of social media within the enterprise. We've surveyed marketing executives (or their direct reports) in medium-sized and large companies and tracked their use of social media technologies. Thanks to the efforts of our sponsors, we've assembled a series of case studies and identified industry best practices. We've catalogued vendor capabilities for the social media marketplace and described the capabilities of over 35 vendors' products.

All in all, we believe that five trends are now driving the future for collaboration and social media within the enterprise and beyond:

- The growing appetite for innovative technologies
- The focus on vertical solutions
- The restrained role for IT
- The advent of rich media
- The importance of building communities

Let's examine how these trends solve business problems.

Social Media Is Growing

From a quantitative perspective, the use of social media is growing. Our survey describes the evolution from Web 1.0 to Web 2.0. We find that companies are going to be adopting new and different kinds of social media — building on the ubiquitous deployments of email, Web sites, and Web conferencing.

But it's not enough to simply communicate and share information in the abstract. Companies are concerned about the new uses of, and specific outcomes for, social media.

It's also important to consider the new economics. Web 2.0 solutions are easy to implement, offer excellent functionality, and come with a low price tag — all factors that help to fuel growth. Some of the growth comes at the expense of Web 1.0 products, especially shared workspaces and email. There may well be more-effective ways to share information within a task team or across an extended enterprise than simply exchanging messages and attachments. Yet much of the growth comes from new opportunities. Web 2.0 gives rise to many new possibilities for engaging with customers, managing interactive experiences, and sharing information. It remains

to be seen how organizations and task teams are going to exploit these opportunities.

Focusing on Vertical Solutions

Combining our survey results with our customer stories, one theme is clear — companies turn to social media to solve specific business problems. As illustrated by our case studies and the best practices they reveal, companies benefit from collaboration initiatives that deliver results.

From one perspective, this is a familiar refrain. It's hardly surprising that the business drivers for social media are comparable from those powering conventional enterprise applications for supply chain planning or customer relationship management.

Yet from another perspective, the trend towards vertical solutions represents a substantial shift, one fraught with opportunity. First-generation collaboration tools — such as email, generic Web sites, and shared workspaces — are basically horizontal applications. They provide a core set of features and functions that apply, however imperfectly, to many different business situations. Simply communicating and sharing information often does little to solve the underlying issues and even contributes to the sense of information overload.

The future for social media focuses on delivering vertical solutions complete with rich domain expertise. The new generation of tools and applications structure the flow of content among people and workgroups to achieve identified business purposes. Thus it is important to define up front the processes and outcomes.

Redefining the Role for IT

How companies deploy social media is changing. To be sure, they can install an application within an enterprise infrastructure — and take responsibility for all aspects of application deployment and management. Or companies can procure social media capabilities as an outsourced service, distributed over the Internet. Many social media vendors offer "software as a service" (SaaS) deployments.

In most cases, Web 2.0 solutions are less pricey than their predecessors. There are robust open source solutions, as well as commercial offerings that can be licensed on a monthly basis with little or no upfront investment. Many are listed in our vendor catalogue. The lower entry price points make it possible for task teams and business units within larger organizations to launch pilots with little financial risk. After the pilot stage, the cost of owning or leasing these newer technologies is much less than owning the previous generation of products. This changes the procurement equation, and the role of IT.

Line-of-business staff are often best suited to define their own information-sharing requirements and to identify applications that meet their needs. IT can best serve as an advisor about technology requirements and standards, and provide guidance

about how Web 2.0 solutions can be incorporated into a company's existing information infrastructure.

Adopting Rich Media

We are creatures of habit and familiar with the art of writing. With email, Web sites, and most other first-generation social media applications, we communicate and share information by the words and phrases we write, perhaps supplemented by still photos or images. We scarcely notice it, but Web 1.0 social media is text-centric.

Web 2.0 social media applications are not limited to text-based information exchanges. Podcasts, audio channels, full-motion video, and immersive experiences are all important content types that contribute to interactive modes of information sharing. It's going to be increasingly important to build community by adopting — and adapting to — these new types of rich media.

Building Community by Design

We have to stress the human dimension. As we listen to customer stories and consider the capabilities of vendors' offerings, we are struck by the importance of management — not in the sense of top-down command and control, but rather by bottom-up guidance, alignment with goals, and learning from experience. Successful social media applications provide a richly featured, easily deployed management framework.

Successful solutions are managed in a way that makes sense for the task team, committed to communicating and sharing information. Building a community of purpose happens not by accident, but by design. Usually there is one person or more involved in facilitating the interaction.

Thus, moderation skills will become an important core competency. The skills required to tune the efforts of a community are in short supply. While there are a number of vendors who currently offer outsourced moderation services, we believe that many companies will want to develop the expertise and community personas in house.

Delivering Social Media in Its Business Context

Finally, what do these five trends mean for the future? It goes without saying that online communities are going to continue to flourish. The growing popularity of social media within the enterprise demonstrates how business people are using these new tools and technologies to exchange information among one another. Information needs to be both trusted and trustworthy. It's important to be able to embed social currency into social media — the ability for contributors to receive something of value from their contributions, usually awarded by the group itself. There are new approaches to do this by peer-rating schemes and wiki-style community editing processes.

There are also inherent checks and balances. Despite the promise of communities for facilitating communications and ad hoc information sharing, there is also the downside danger — companies and organizations will try to create communities where no true community potential exist. A community may be too broad and diffuse, or too focused and idiosyncratic to attract a meaningful following, and in the ensuing digital chatter only contribute to information overload.

A healthy community needs fresh, high-quality content and engaged members. A community needs to benefit its members — people will want or need to invest their time, and get something from their interactions in return. Web 2.0 opens up the possibility of many micro-communities where a few members can share information intensely.

When all is said and done, the development of social media is going to continue. There will be setbacks — while some Web 2.0 initiatives are not going to work, many will. Over the next five years, we expect the social media tools and technologies to continue to improve, the domain knowledge to expand, and the methodologies to become more sophisticated. Among the emerging population of digital natives, collaboration skills are well developed and participation in communities is a way of life. All in all, we believe that collaboration and social media will be among the fastest-growing technologies and that the information needs of business people throughout the world will be better served.