



The Aragon Research Globe™ for Team Collaboration, 2022

Messaging as the Work Hub for Humans and Virtual Agents to Communicate

Author: Jim Lundy

Video Producer: Adam Pease

Topic: Team Collaboration

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

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SUMMARY

With hybrid work becoming the new way to work, team collaboration has become one of the go-to collaboration applications to allow people to communicate in real-time. Team collaboration allows both humans and bots to interact and work together. Aragon Research's Globe for Team Collaboration, 2022 evaluates 19 major providers making a difference in this space.

[Watch the Visual Research in AIN.](#)

Key Findings:

Prediction: By YE 2022, 40% of UCC providers will offer an AI-based digital assistant to enable a more seamless collaboration experience (70% probability).

Prediction: By YE 2025, 60% of common workplace questions will be answered by a virtual agent instantaneously, eliminating the search for answers and speeding up productivity (70% probability).

Prediction: By YE 2025, team collaboration will overtake email as the way that knowledge workers collaborate with each other (60% probability).

TABLE OF CONTENTS

Introduction.....	3
Team Collaboration Is the Real-Time Communication Platform for Hybrid Work	3
First-Line Workers and Remote Workers—Team Collaboration as the Primary Work Tool	3
Team Collaboration Isn't Just for People—Virtual Agents Are Coming	4
Virtual Agents and the Automation of Tasks and Meetings.....	4
Team Collaboration Is All About Work—From Anywhere	5
The Core Elements of Team Collaboration	5
Becoming the Daily Go-To Application for Team, Enterprise, and Work Processes	6
Characteristics of Team Collaboration Platforms—The Conversational UX for Remote Work	6
The Unified Client Is Now the New Normal	9
Team Collaboration Overtakes Email Inside the Enterprise.....	9
The Secure UC&C Era: Why Enterprises Must Act	10
Putting Team Collaboration to Work in the Enterprise.....	10
The Aragon Research Globe™ for Team Collaboration, 2022	12
Leaders	13
Contenders	20
Innovators	25
Aragon Advisory	32
Bottom Line	32
Aragon Research Globe Overview.....	33
Dimensions of Analysis.....	33
The Four Sectors of the Globe	34
Inclusion Criteria.....	34
Vendor Inclusions	35
Vendor Exclusions	35

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Introduction

Enterprises have had to adjust to new realities of work due to COVID. Collaboration technologies including both video conferencing and team collaboration continue to be must-have capabilities for teams and for the enterprise overall.

In a period of over 18 months, team collaboration has become a vital part of the daily work process. For enterprises that have embraced it, team collaboration has overtaken email as the way that work gets done. It has also challenged voice inside the enterprise. Regardless, the team collaboration landscape continues to evolve as enterprises find new ways to leverage the growing set of features and capabilities. In this Research Note, we discuss the current and future states of the team collaboration market and evaluate 19 major providers.

Team Collaboration Is the Real-Time Communication Platform for Hybrid Work

Team collaboration offerings don't care where you are working from, which is part of the reason why they have become so much more utilized during the pandemic, and now in the post-pandemic era. While enterprises have decoupled team collaboration, many have access to more than one platform. More firms have a team collaboration offering as one of their go-to applications. While team collaboration emerged as best-of-breed, today it is bundled with more applications than ever before.

Many front-line worker jobs depend on team collaboration, which was the case before COVID. How many knowledge workers are also depending on team collaboration because of the lack of being together with co-workers?

First-Line Workers and Remote Workers—Team Collaboration as the Primary Work Tool

Team collaboration is ideal for the workers who are never at a desk, called first line workers. In fact, because these people only have a mobile device, team collaboration becomes a de facto work app for them. First-line workers need more than just collaboration—they need scheduling for shifts, they need tasks, and much more. This is why more team collaboration providers are offering their features as more of a mobile-centric digital work hub to allow them to get their jobs done.

At the same time, remote workers need a way to reach others. Presence helps them to see who is online and available.

A few firms have really focused on first-line workers and added unique features that have become highly desirable. Microsoft has added a number of features, including time and attendance to their platform.

Tasks have emerged over the years as more of a core part of team collaboration. This, along with the scheduling of work, is one of the key reasons we see team collaboration poised to serve as either a lightweight or a full digital work hub. Functionality will depend on the needs of the workers, as people in service industries do not need all of the project management capabilities that some productivity suites or work hubs deliver.

Team Collaboration Isn't Just for People – Virtual Agents Are Coming

Team collaboration isn't just about people. It is about chatbots, which are increasingly being referred to as virtual agents, powered by conversational AI platforms. Virtual agents are all about helping people via services such as answering questions or helping get the information to perform a task.

The market for virtual agents, which Aragon calls digital labor, is growing as more task-specific virtual agents come online. While a few virtual agents are offered today to assist contact center agents (agent assist), we expect to see more providers offer built-in virtual agents or templates for customizing them.

Aragon expects that by 2025, virtual agents will take over the time-consuming tasks of finding answers to common questions. This capability will be a game changer in the enterprise and will be a factor in overall employee experience.

Prediction: *By YE 2025, 60% of common workplace questions will be answered by a virtual agent instantaneously, eliminating the search for answers and speeding up productivity (70% probability).*

Virtual Agents and the Automation of Tasks and Meetings

The vision for people-centric collaboration is to have a communications digital assistant (i.e., an AI chatbot) with the ability to help schedule or begin a call, start recording, schedule, and launch meetings, make adjustments for any encountered errors, or execute other commands. AI chatbots will be able to accomplish more tasks for people in the quest to make collaboration and communications more seamless. Today, more providers have a bot/virtual agent as part of their offering. Cisco's Webex Assistant, which takes notes and can also record action items, is a good example of a task-specific bot.

Prediction: *By YE 2022, 40% of UCC providers will offer an AI-based digital assistant to enable a more seamless collaboration experience (70% probability).*

Software applications are making their way into mobile messaging conversations and contact centers in the form of a chatbot, embedded with natural language processing (NLP) capabilities.

Chatbots help to shape and define the customer/user experience (CX/UX) or the employee experience and are often the first interface a customer or employee may use. AI-based chatbots can be retrofitted to an existing application to improve its performance and extend its life without requiring a complete re-write. Adding conversational AI is simpler, quicker, and more economical than many enterprises realize.

Team Collaboration Is All About Work—From Anywhere

Partly because there is no inbox, team collaboration is ideally suited for people to collaborate on work—it is the new normal in the digital workplace. The usage of team collaboration is at an all-time high and poised to go higher.

For workers, team collaboration allows one to stay in touch with teammates, which is vital to enable team members to have a feeling of connection to their work. However, as described later in this Research Note, team collaboration is also becoming a work hub, which facilitates work, and as such goes beyond just communications.

For managers, team collaboration is a key way to collaborate with groups and with individuals. It does not replace regular 1:1s, but it does make the ad-hoc chat and check-in far less obtrusive.

The Core Elements of Team Collaboration

The fundamental features of a team collaboration offering keep expanding and going beyond messaging alone (see Figure 1 and Note 1).

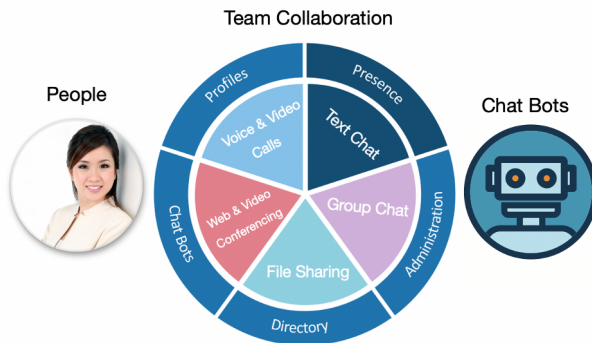


Figure 1: Team collaboration capabilities will increasingly be leveraged by both people and chatbots.

Note 1: Key Capabilities of Team Collaboration

Interaction Modes

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

Infrastructure Elements

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

Becoming the Daily Go-To Application for Team, Enterprise, and Work Processes

It is important to note that not all enterprises have adapted team collaboration. For those that have, it has become a container for work and work projects. Team collaboration has also challenged and overtaken email as a go-to application for day-to-day interactions and ad-hoc work.

Adoption of team collaboration increased during Covid-19. Many enterprises use team collaboration apps for day-to-day work, but they also use it for company-wide messaging. In other settings, such as college campuses or large enterprise campus environments, team collaboration is used for emergency notifications. We also see marketing teams using team collaboration for events to coordinate and communicate with both the internal and extended teams involved.

Today, team collaboration is about teams interacting, but it is also about bots interacting. This is one of the biggest trends that has come about in the last year.

Characteristics of Team Collaboration Platforms—The Conversational UX for Remote Work

With hybrid work still the norm, team collaboration is one of the go-to applications for working anywhere, on any device, across time zones and geographies.

A primary focus of team collaboration is to facilitate real-time messaging while at work. For frontline workers team collaboration now goes further, serving as the work platform, with real-time communications happening on their mobile device for things such as responding to a service call or a customer request.

All of this points to a shift of team collaboration becoming a key ingredient in the hybrid digital workplace. A few years ago, the focus was adding calling and meetings, but today, the focus has shifted to making work more seamless.

So, while team collaboration features keep expanding in their core feature set, we also see team collaboration evolving in two ways:

1. Part of a Meeting or a UCC platform.

A common bundle is video conferencing and team collaboration. This has become one of the easiest ways to add team collaboration with a meeting bundle.

We feel that messaging and meetings are poised to challenge the dominance of voice calls. That said, the value of a UCC platform is its ability to deliver voice and video calls as part of one integrated stack. That, combined with reliability and redundancy, makes a difference in which vendor is selected.

Prediction: *By YE 2022, the team collaboration and web meetings markets will converge (70% probability).*

The UC&C platform play where meetings, voice calls, and team collaboration are bundled is

now a common bundle that enables omni-channel communications and collaboration. 8x8, Avaya, Cisco, Google, LogMeIn, Microsoft, RingCentral, and Zoom all offer a full team UCC platform as part of their work platform. Work platforms may be UCC-centric or they may be full digital work hubs where messaging is front and center. It's clear that mobile devices are here to stay, and the immediacy of mobile chat has been recognized (see Figure 2).

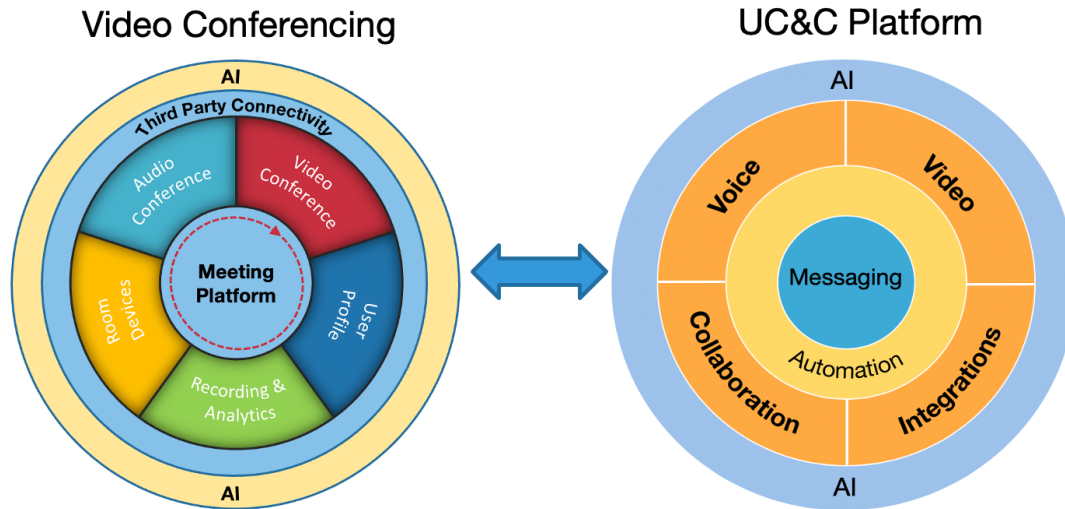


Figure 2: Team collaboration is quickly becoming a cornerstone of video conferencing, as well as UCC platforms.

With the advent of worldwide pandemics, the need for a robust and redundant cloud-based communication platform is now an enterprise requirement. The fallout of COVID-19 will be a significant and accelerated migration to a cloud-based UCC platform. Because of the need for remote work, the need for all modalities of team collaboration, from voice calls to video meetings, is growing. This fuels the need for an integrated platform.

2. Team Collaboration as a Digital Work Hub

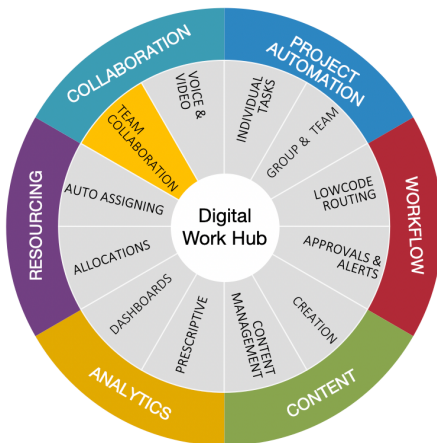


Figure 3: Advanced digital work hubs are emerging that feature in-app messaging to keep teams on track.

More than anything, team collaboration is now positioned as a full or partial digital work hub (see Figure 3). Enterprises that need frontline workers to be very productive should look at team collaboration offerings that are part of a digital work hub platform. In our digital work hub research, we have seen different types of work hubs emerge.

Team collaboration is often horizontal or it is vertically focused. Symphony and TigerConnect are both examples of a vertical focus. The other key aspect of team collaboration as a work hub is extending its capabilities via integrations.

More integrations can allow enterprises to customize the feature set for a work group or department. This year Microsoft has opened up Microsoft Teams and RingCentral now has more partner apps that will work inside its Glip Team Collaboration App.

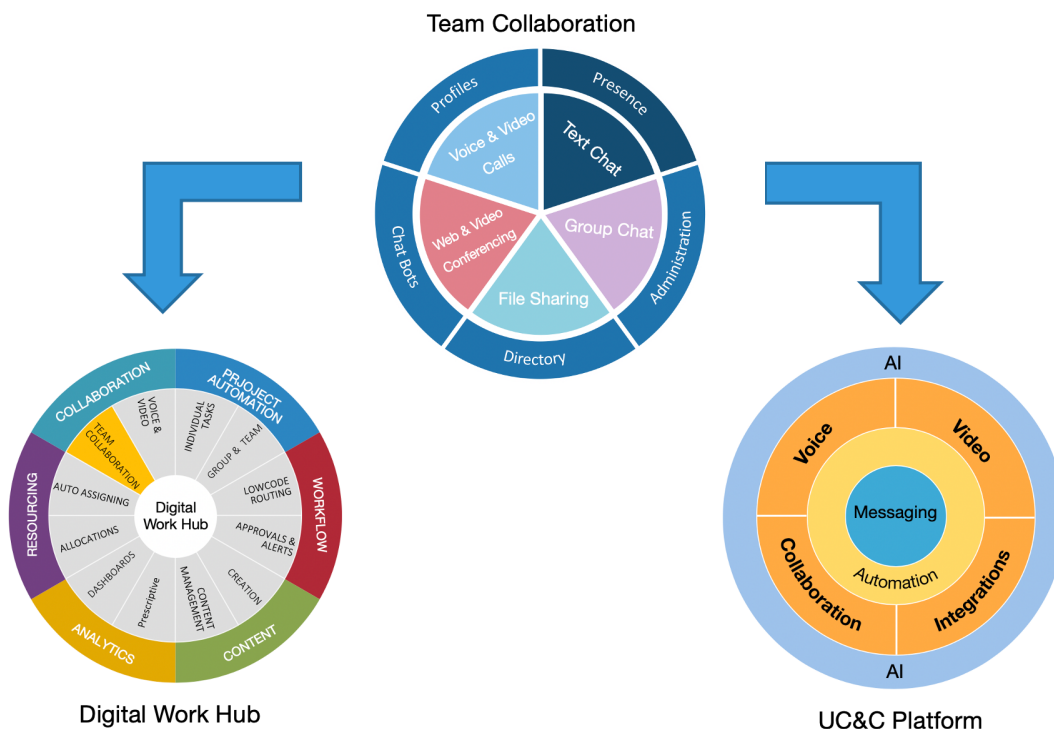


Figure 4: Team collaboration is becoming a core part of UCC platforms and emerging digital work hubs.

We illustrate this market evolution in Figure 4, which should help to guide buyers.

The Unified Client Is Now the New Normal

A common unified client is at the center of what Aragon calls people-centric collaboration. A common client exposes all of the features of team collaboration in a seamless way. In many ways, team collaboration is at the heart of a UC&C platform and that is one of the main reasons for a single experience. Users get frustrated when there are too many tools.

Many vendors have enhanced their offerings over the last year, including Cisco, Fuze, Microsoft, RingCentral, and Vonage. Aragon feels that the market is starting to put people at the center of UCC, which is more about people-centric collaboration than channel-specific UCC. Use cases will help to drive this, as will the addition of intelligence through predictive and prescriptive analytics.

Team Collaboration Overtakes Email Inside the Enterprise

While email still dominates for external communications, team collaboration is quickly becoming the de facto way that people can collaborate and communicate in real time inside the enterprise.

Team collaboration is faster, more immediate and has a much higher probability of being acted on than email.

Key reasons for the shift to team collaboration:

- Faster to communicate
- Higher read rate and engagement rate by recipients
- Preferred method by users
- Ability to communicate with bots and humans

Prediction: By YE 2025, team collaboration will overtake email as the way that knowledge workers collaborate with each other (60% probability).

The Secure UC&C Era: Why Enterprises Must Act

Secure communications and collaboration has now become a requirement for enterprises, regardless of size. The challenge enterprises face is an unprecedented level of risk that is often tied to insecure communications infrastructure. Many firms have already been compromised, and many are actively being compromised now and are completely unaware. The situation is worse now that some of the attacks are from organized cybercrime or government-sponsored organizations. These attacks and hacks are very sophisticated and can easily overwhelm a communications infrastructure.

In order to protect against these increasing threats, enterprises need to embrace a holistic, defense-in-depth solution, considering all aspects of security, including:

- Securing users access and identity
- Securing apps and devices
- Segregation of data and privileges
- Securing content & streaming media
- Securing backups and protecting from alteration or deletion
- Protection against data loss and malware
- Compliance with legal and regulatory policies

For team collaboration, security and privacy are key. Enterprises should ensure that vendor capabilities are examined carefully to ensure that there are no easy ways for hackers to spy on users or even hack them.

Putting Team Collaboration to Work in the Enterprise

Not every enterprise has made the shift to team collaboration, but Aragon feels that the time is now. If you already have video conferencing, then check to see if team collaboration is available with that platform. If you already have a UC&C offering, consider turning on the team collaboration feature in that platform.

Regardless, you may have several team collaboration license options available and you may have to decide which one to enable either for a team a department or for the entire enterprise

Team collaboration also can serve as an immediate notification capability, which is important both for announcements as well as emergencies. This too serves as a justification for why the enterprise should step up and deploy team collaboration now or in 2022.

Team collaboration is at the heart of a simpler and a faster way to communicate and collaborate with co-workers and with customers. When communication is expedited, work can be accomplished faster. This is one of the reasons that Aragon sees team collaboration growing even faster as a category.

The Aragon Research Globe™ for Team Collaboration, 2022

(As of January 11, 2022)

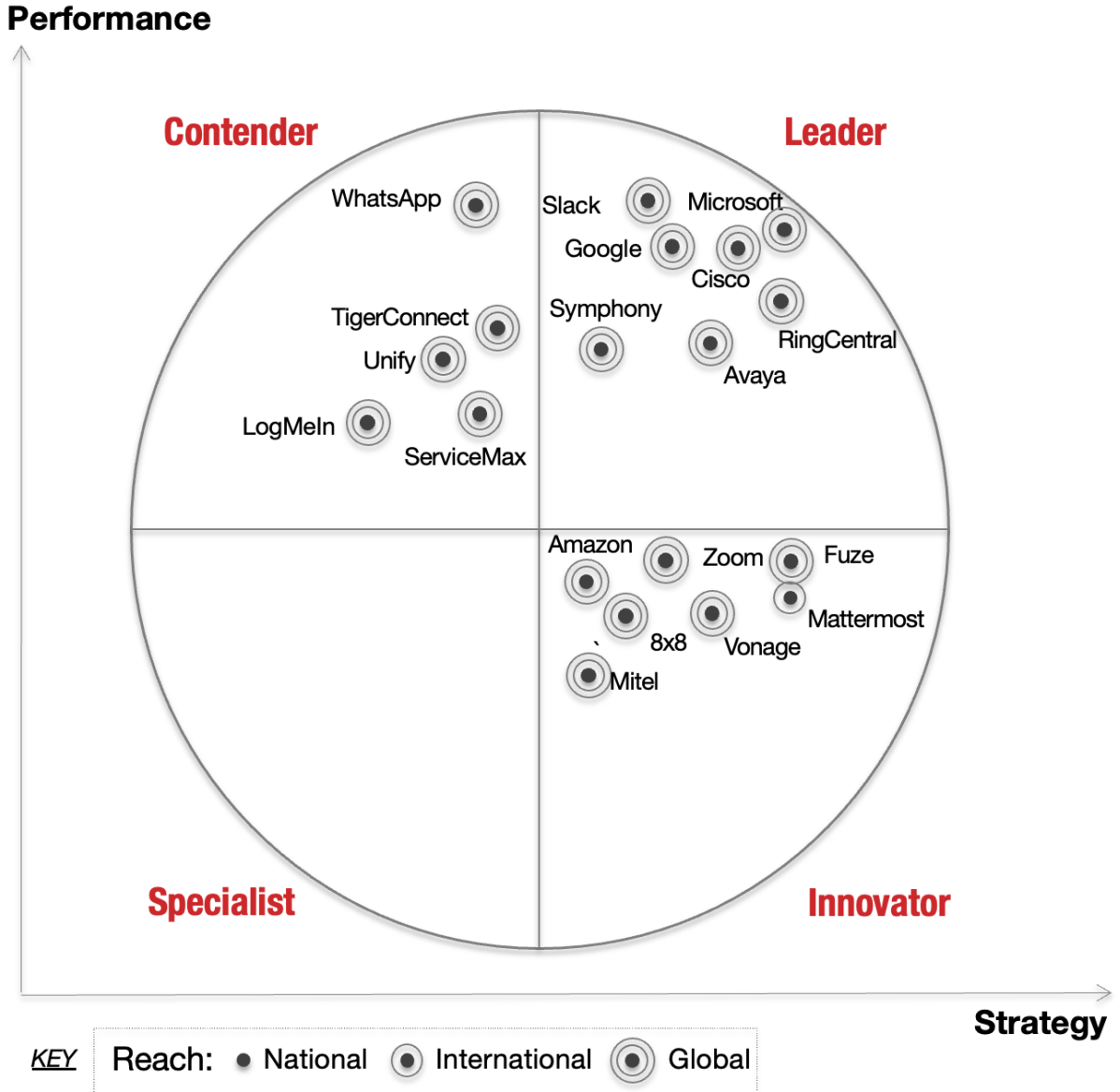


Figure 5: The Aragon Research Globe™ for Team Collaboration, 2022.

Leaders

Avaya

Avaya continued to invest and innovate in UC&C in 2021. Avaya Spaces is Avaya's flagship team collaboration platform, which provides a complete UC&C solution with meetings, messaging, and telephony backed by both its enterprise and midmarket platforms. Spaces is built on a modular CPaaS architecture for composable and customizable experiences, enabling organizations to quickly build the experience they need for verticals or workflows. Avaya also offers Avaya Cloud Office, powered by RingCentral, which has seen strong adoption and has been embraced by Avaya's large partner network.

In 2021, Avaya enhanced Spaces with improved calling, more seamless workflows, high quality audio, and the ability to add larger and more interactive meetings. It also added more AI capabilities to Spaces including the ability to overlay speakers on top of content.

Avaya Spaces offers robust presence capabilities so people can know if a user is online and available to chat. They recently added integration with on-premise telephony where organizations can leverage their existing on-premise telephony capabilities combined with meetings and team collaboration from the cloud within the Spaces browser interface, putting everything in one convenient place for the user.

Avaya leverages its highly resilient core platforms into its cloud offerings, providing full native support for the underlying communications and collaboration capabilities, including voice, video, meetings, mobility, team collaboration, messaging, and customer contact. Avaya also integrates with Apple, Google, Microsoft Teams and Office, and Salesforce/Slack. Avaya has made AI part of its overall UC&C focus, and its partnership with NVIDIA is a move that others will most likely emulate. Avaya also announced that it was introducing its chatbot called Ava, which had previously been an internal pilot.

Strengths

- UCC platform
- Cloud and on-premise capabilities
- Overall user experience
- Team collaboration
- Chatbot support
- Highly reliable telephony and UC
- Partner network and ecosystem

Challenges

- Balancing multiple product offerings

Cisco

Cisco, which transitioned the leadership of the collaboration group to Javed Khan in 2020, now offers an integrated UC&C portfolio with support for both on-premise and cloud offerings that has a significant focus on AI and automation. Cisco released a completely new Webex App experience that allows people to focus on work with seamless calling, messaging, meetings, and team collaboration, all in a single app experience, which is easier for customers to use. The Webex App features new collaboration capabilities and new automation and intelligence features, including people insights, which positions Webex as an intelligent UC&C provider.

Cisco's native cloud calling solution—Webex Calling—is powered by Cisco's Webex cloud and is integrated with Webex Meetings and team collaboration globally. Cisco also offers Webex Contact Center—a cloud contact center service integrated with the Webex UC&C suite. Cisco offers a range of collaboration devices including room and personal video endpoints, IP phones and headsets that are integrated with the Webex user and service management experience.

One of the highlights that works across the Cisco UC&C Platform is the Webex Assistant, which can take notes and assign action items. Combined with people insights from Webex, gesture recognition, built-in noise removal, secure ways of joining meetings, better audio and video quality, and real-time translation support for more than 100 languages, it is a different Webex offering than it was at the beginning of 2020.

Cisco has continued to invest in security across its collaboration portfolio. This includes support for privacy, encryption, data loss prevention, mobile security, and legal hold. Cisco also offers deep integrations with business apps including major productivity tool and workflow apps including: Google, Microsoft O365, Apple, Box, Dropbox, DocuSign, and Salesforce. Cisco offers one of the most complete sets of voice and video conferencing platforms, now fully integrated within the Webex Suite, its integrated cloud-based collaboration offering.

Strengths

- Webex Assistant and conversational AI support
- Mobile apps
- Ease of use
- Escalation from chat-to-voice and video meetings
- App store, including options for free downloads
- Enterprise security compliance
- Flexible licensing

Challenges

- Balancing large portfolio of Cisco collaboration offerings

Google

Google, under the leadership of VP and GM Javier Soltero, has been executing the transition from G Suite to the improved Google Workspace and the full global rollout of Google Voice. Google has made significant investments into Google Workspace, and much of that has been for its UC&C portfolio. Google Chat is its flagship team collaboration offering that has been morphing into the work hub for Google Workspace.

In the past year, Google has made significant updates to Google Chat. Google Meet, which also got a makeover, is now tightly integrated with Google Chat. Google Chat is also tightly integrated with the Gmail experience. By launching a series of new features and tighter integrations within Google Workspace, Google Meet/Chat grew its customer base substantially.

Google Chat has always been easy to use but now it is faster and even more seamlessly integrated with Gmail and Google Meet, its updated video conferencing service. Google Chat rooms are poised to become the *de facto* collaboration work hub— featuring integrated documents, tasks, chat, and more. Rooms is the hub where files, tasks, and even chats can take place. While others offer this similar approach with their work hub offering, Google's approach feels smoother with a strong element of industrial design behind it.

Google Voice, Chat, and Meet are also seamlessly integrated with the broader family of Google Workspace collaboration offerings, which allow users to launch straight into a full Meet video call from Calendar, Gmail, and Chat. Administration is also seamless and can be done via the Administration interface within Google Workspace. Google Meet and the full Google UC&C offerings work on a global basis making global calls a seamless experience.

Strengths

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

Challenges

- Balancing focus on Google Chat vs. G Suite

Microsoft

Microsoft Teams is the flagship UC&C platform that evolved significantly in 2020 from a platform primarily used for team collaboration to a leading video conferencing offering. Besides Meetings, Microsoft Teams is the primary work hub for all voice and messaging-based communications. As part of the Microsoft 365 and Office 365 bundles, Microsoft Teams has become the lead interface for collaboration, overtaking Outlook, which now can run as a tab inside Teams. Microsoft 365 adoption has been growing because it is a full digital work hub with a set of independent applications that are increasingly integrated together.

Microsoft Teams has a number of features for frontline workers, including time and attendance. It is also part of a new product offering called Microsoft Viva, which is an employee experience platform. It is important to note that Microsoft still has a large customer base of Skype for Business (SfB). Microsoft continues to enhance Microsoft Teams to encourage migration to the cloud, but it still offers full support to SfB customers.

Microsoft Office has calling plans for Teams. For it to be a full UC&C offering, enterprises must license the E1, E3, or E5 versions of Office 365 to gain the calling features. Microsoft Teams has continued to focus on front-line workers, which has helped to position Teams as both a communications platform and a digital work hub. With all of the enhancements to Microsoft Teams, it has become a first-class video meeting experience. Existing Microsoft customers can take advantage of this since many have had the licenses for teams and have now started to use them.

Strengths

- Office 365 integration
- Multimodal project and team-centric collaboration
- First-line worker support including shift scheduling
- Third-party integrations
- Chatbot support
- Security
- On-premise deployment option

Challenges

- Overlap between native Teams and now Teams as Part of Microsoft Viva

RingCentral

RingCentral, which named a new Chief Innovation Officer Kira Makagon, has continued to grow RingCentral MVP via robust partnerships, including its newest one with Mitel that was announced on November 9th. With its new Unified Client, RingCentral Glip is its team collaboration offering. The RingCentral upgraded Unified Client is fully featured for voice, chat, and the new native meetings offering, RingCentral Video. The Unified Client approach by RingCentral makes all features equally available. RingCentral team collaboration serves as the core of the RingCentral UCC platform, RingCentral Office.

RingCentral Mobile Video Platform (MVP) features messaging, video, and phone. RingCentral touts seamless switching between modes, and even switching between devices – so an end-user can continue to collaborate in a hybrid manner, moving a video meeting or call from their home office to their car if needed. In addition, RingCentral has a freemium version of its video conferencing offering called RingCentral Video, which features both video and messaging and focuses on pre-, during-, and post-meeting collaboration. The RingCentral UC&C platform is now available in 44 countries with its full set of capabilities—high-quality voice, video conferencing, mobile messaging, and cloud contact center capabilities.

In April 2020, RingCentral announced RingCentral Video, which is a homegrown, high-quality video conferencing solution included in RingCentral Office. RingCentral has hundreds of features that have been added to RingCentral Video since it launched. Its video product continues to evolve and the company is focused on “intelligent” capabilities and integrations to enable pre-, during-, and post-meeting collaboration experiences. RingCentral Video is an alternative to the partner capabilities provided by Zoom.

Recent platform innovations include RingCentral’s high-volume SMS, which delivers CPaaS style capabilities, along with RingCentral Embeddable, which enables developers to quickly embed message, video, and phone into their web applications.

Strengths

- Mobile-first app
- Freemium support
- Third-party app integration
- Voice and video support
- Task management
- Third-party content sharing
- Ease of configuration and deployment
- Open platform and app gallery integrations
- Robust analytics across message, video, and phone

Challenges

- Balancing focus on UCaaS vs. messaging

Slack

Slack was acquired by Salesforce in a \$27 Billion transaction that closed in July 2021. It is still focused on team collaboration including Slack Enterprise Grid. Enterprise Grid has helped it to grow in larger accounts due to its advanced security and administrative features. However, Salesforce now has a say in Slack's destiny and is positioning it as part of its Digital HQ approach.

Slack features channels have now expanded with the launch of Slack Connect, which it stated will allow up to 250 external partners and customers to collaborate in the same channel. Slack Connect has become popular with users and Slack indicating over 100,000 enterprises have leveraged Slack Connect to work with partners. In 2021, Slack added Clips, which allows users to share audio, video, and screen recordings with others.

Slack offers strong message editing features and integrations with apps that provide the ability to conduct polls. Slack supports chat, voice, and video calls, and its approach to groups via channels has seen major success. Slack's robust API framework has enabled a growing partner ecosystem of over 2300+ apps in the Slack app directory, including Concur, Google, Workday, SAP, ServiceNow, and others. As it is now part of Salesforce, Slack has the opportunity to gain increased levels of investment as Salesforce works to sell its Digital HQ message to enterprises.

Strengths

- Team-oriented
- Document sharing
- Channel-based communication
- Chatbot support
- App integration (App Directory)
- App development capabilities

Challenges

- Balancing support for chat vs. voice and video collaboration

Symphony

Symphony focuses on offering secure team collaboration for the financial services industry. Over the last year it has enhanced its offering to become more of a work hub for enterprises with an expanded feature set that includes video meetings and voice calls. Its funding of \$510 Million has allowed it to invest in both product and go-to-market. Symphony has made conversational AI part of its strategy and it has a growing number of pre-built chatbots.

In July 2021, Symphony announced that Google Cloud has become its primary partner for cloud deployments globally. It also announced a new partnership with Saphyre to enable AI-powered workflows for pre- and post-onboarding for front, middle, and backend and office teams. Symphony also includes a built-in user directory that enables pre-approved internal and external users. Given its fast growth in financial services, we expect Symphony to target other industries such as legal and government that have similar security and compliance requirements.

Strengths

- Financial services focus
- APIs
- Ease of use
- Meetings
- Encryption
- Built-in directory

Challenges

- Awareness outside of financial services

Contenders

LogMeIn

LogMeIn, which completed its \$4.3 Billion sale to Francisco Partners and Evergreen Coast Capital Corporation, offers a full UC&C platform powered by its flagship GoToMeeting video conferencing offering. Business Messenger Service is its team collaboration offering. GoToMeeting also offers built-in transcription capabilities. LogMeIn also offers GoToRoom, its room system that connects via GoToMeeting. It partners with Dolby, Logitech, and Poly for its room-based meeting solutions.

LogMeIn's GoToConnect is a complete UC&C platform with Jive's cloud-based voice PBX, video conferencing powered by GoToMeeting, messaging, and more. In March 2021, LogMeIn announced a refresh to the GoToConnect web and mobile interfaces, making it easier for users to access different sets of functions, including Find Me, Follow Me, Advance Call Flip, Shared Extension, and Voicemail Transcriptions.

LogMeIn also offers a full contact center, with GoToConnect Support Center launched in 2020. It was updated this year to include configurable permissions and customized pause reasons. It also offers new outbound capabilities launched in June of 2021. This caters to sales teams and includes an outbound dialer

Strengths

- Web and video conferencing capabilities for multiple use cases (1:1, team collaboration, webinars, and large meetings)
- Install base
- UCC platform
- Brand awareness
- Ease of use

Challenges

- Overall focus on messaging

ServiceMax

ServiceMax had a busy year and continues to focus on field service. It continues to offer Zinc Intelligent Remote Service as one of its core products, which are entirely focused on field service. In July 2021, ServiceMax announced that it was going public by entering into an agreement with Pathfinder Special Acquisition Corporation. This \$1.4 Billion deal also included the previously announced acquisition of Liquid Frameworks, which is focuses on field service for the energy and gas sector.

ServiceMax also continues to offer Asset 360 for Salesforce. The Zinc app is offered with either product (ServiceMax Core or ServiceMax Asset 360 for Salesforce). This makes ServiceMax one of the few providers to offer a complete solution that includes communications for service. Zinc has always focused on the first-line worker use cases.

With Zinc and the other ServiceMax Apps, ServiceMax now has a complete digital work hub for service teams. Aragon feels that for field service, built-in messaging will become a de facto requirement. Zinc offers robust encryption, which is critical for sensitive work locations and discussion topics. Zinc also supports chatbots and has some compelling use cases for service. With the race to offer more focused digital work hub environments, ServiceMax just put the market on notice with this move.

Strengths

- Field service use case
- Focus on mobile worker use case
- Ease of use
- Hotlines
- Remote service
- Push-to-talk functionality
- Encryption
- HIPAA compliance

Challenges

- Multiple ServiceMax mobile apps

TigerConnect

TigerConnect focuses on team collaboration and communications for healthcare. It has also expanded its offering and now with its new offerings it is positioned as more of a digital work hub for healthcare with specific focus on communications. The TigerConnect offerings now include TigerConnect Clinical Collaboration Platform, TigerCare Physician Scheduling, TigerCare Alarm Management and Event Notification, and TigerCare Patient Engagement (formerly TigerTouch+) for video calls and notifications.

TigerConnect enables doctors, nurses, and care teams to share and act on information (such as messages, alerts, video, and patient data). TigerConnect enables the timely delivery of actionable patient information across shift changes, locations, and roles as part of its strategy for improving the patient experience. TigerConnect conversations initiated by the health professionals can include patients, family members, and specialists.

Strengths

- Healthcare focus
- HIPAA-compliant
- Care team collaboration
- Patient communication (video/voice calling and texting)
- Telehealth
- Ease of use
- Encryption
- Alerts and notifications
- Clinical system integrations
- Physician scheduling
- File sharing
- HITRUST Certified
- Analytics

Challenges

- Focus outside of North America

Unify

Unify, which is a wholly-owned subsidiary of Atos, has rolled out its service Unify Office, which is powered by its partnership with RingCentral. Team collaboration is part of the offering of RingCentral MVP. Unify offers Unify Office in coordination with Unify OpenScape as its on-premise offerings. One of the big focus areas for 2021 is vertical market solutions in areas such as government and healthcare, where Unify has historically done well. The partnership will complement existing Unify OpenScape offerings and the Atos CPaaS orchestration platform. It will be a part of the growing Atos digital workplace portfolio.

In March 2021, Unify announced updates to its OpenScape platform that included WebRTC screen sharing, SIP URI Dialing, and improvements to the Atos Unify OpenScape mobile apps. Through Unify, Atos offers mission-critical communications capabilities that include a focus on government and healthcare, which it provides an integrated platform to support. As with others, we expect Unify to leverage the cloud voice capabilities of RingCentral for those enterprises that want cloud-based offerings. This means that Unify now has a stronger portfolio to deliver cloud, on-premise, and hybrid cloud options for communications and collaboration.

Strengths

- Enterprise and carrier-grade scalability
- Integration with OpenScape and mission-critical applications
- Large enterprise experience
- Voice and telephony integration
- Global partnerships

Challenges

- Awareness outside of Unify customer base

WhatsApp

WhatsApp, a Meta brand, is one of the most popular free team collaboration applications that has both consumers, but more importantly a business edition. The business edition targets small businesses that want to attract buyers via their business profile. Enterprises pay for conversations by leveraging add-on services from providers who in turn pay fees to WhatsApp.

WhatsApp continues to see strong adoption in work groups such as police, fire, and security. WhatsApp's key features include messaging, group chat, voice and video calls, and document sharing. WhatsApp supports iOS, Android and Desktop editions for Mac and PC.

WhatsApp now offers encrypted backups as part of its service. This along with an increased focus on security has allowed WhatsApp to continue to grow and maintain user loyalty. With growing demand for real-time messaging with consumers and customers, WhatsApp shows no signs of slowing down

Strengths

- Multimodal project and team-centric collaboration
- Integrations
- Chatbot support
- On-premise deployment option

Challenges

- Awareness outside of B2C use cases

Innovators

8x8

8x8, which announced industry veteran David Sipes as CEO in December 2020, offers 8x8 XCaaS that includes integrated unified communications and contact center. In addition to Dave Sipes, 8x8 has added a number of new executives to the firm, including Walt Weisner as Chief Customer Officer and Amritesh Chaudhuri as Chief Marketing Officer. On December 1st, 2021, 8x8 announced that it was buying Fuze for US \$250 Million. The deal is expected to close in the first half of 2022. In May 2021, 8x8 announced its integrated UC&C and contact center offering that it calls XCaaS or eXperience Communications as a Service. The 8x8 XCaaS platform includes calling, messaging, and video meetings as well as contact center and CPaaS.

8x8 offers 8x8 team messaging, its team collaboration offering, as part of XCaaS and bundled with its X Series plans. The enhanced capabilities include SMS, MMS, and 1:1 and team chat with file sharing along with integration with more than 20 third-party messaging systems such as Slack and Webex Teams. Besides its own messaging offering, 8x8 also offers 8x8 Voice for Microsoft Teams, and with it, the ability to offer voice calling in 46 countries. Part of the renewed product focus at 8x8 also means that it announced a financially backed SLA that offers a 99.999% uptime guarantee across its UCaaS and CCaaS platform.

With 8x8 Meet, it offers a full web and mobile experience as part of the 8x8 Work desktop, mobile, and web client. 8x8 also offers a room solution. It includes a dynamic integration framework that allows 8x8 users to have more seamless connectivity with over 35 partner apps, including Microsoft Dynamics, Salesforce, and Slack. 8x8 has a growing global footprint that includes data centers in North America, the UK, Amsterdam, APAC, and Brazil.

Strengths

- Cloud-based PBX
- Video meetings
- UC&C and contact center integration
- Contact center
- Partner integrations
- CRM integration

Challenges

- Overall focus on team collaboration

Amazon

Amazon continues to offer Amazon Chime as its flagship UCC platform. Amazon Chime offers video conferencing-based meetings, calls, chat, and content sharing both inside and outside organizations. The primary go-to market for Amazon is white-labeling it for other providers, such as CenturyLink, Comcast Business, and Nextiva. Amazon Chime Team Collaboration offers 1:1 voice and video calls, smart presence, the ability to start a meeting from Slack, and chat bot support.

Amazon Chime works with Alexa for Business, which means that users can use Alexa to start meetings with their voice. Alexa can start video meetings in large conference rooms and automatically dial into online meetings in smaller huddle rooms and from a user's desk. Amazon also offers the Amazon Chime SDK which allows for embedded voice and video and Amazon Lex, its chatbot and conversational interface platform, which is fully integrated with all AWS Services. Amazon Lex has become a strong choice for many conversational AI solutions, in fact, several of the technology solutions reported in this Globe either use Lex or can be configured to use Lex for part or all their conversational AI technology stack.

The Amazon Chime SDK has quickly gained traction and counts Slack Technologies amongst its many customers. Amazon offers a free version of Chime and allows users to add additional features at a minimal cost.

Strengths

- Full UCC features
- Works with Alexa for Business
- Partnerships
- Chat bot support
- Pricing

Challenges

- Overall focus on team collaboration

Fuze

Fuze announced on December 1st that 8x8 was acquiring them in a deal valued at \$250M. Fuze has continued to offer its flagship UC&C platform that features its robust video meeting platform, Fuze Meetings. In February 2021, Fuze CEO Brian Day announced that its revenues are over \$130 Million annually, and also that industry veteran Christopher Jones joined as Chief Revenue Officer. Fuze continues to offer a complete UC&C platform that supports a seamless user experience across all UC&C modalities, including Fuze's mobile and web offerings. Team collaboration is a native feature of the Fuze platform, which also includes a seamless and easy-to-use common client.

The Fuze platform has continued to push the envelope on ease of use, leveraging its wholly-owned IP for audio, video, and chat. This is why it has continued to win large enterprise deals. Besides its full UC&C platform, Fuze is one of the only UCC vendors that includes its own native contact center offering within the overall Fuze experience and has always offered its own contact center offering, while also partnering with others. The combination of Fuze's UC&C offering and a solid and growing install base for contact center positions Fuze well for the growing demand for an integrated UC&C suite.

Fuze offers a full room experience in addition to optional webcasting, supporting up to 1,000 participants. In 2021, Fuze announced that it was partnering with Big Marker for webinars and virtual events. Fuze is also leveraging its focus on data to provide a more advanced set of analytics and data visualizations to users and administrators to improve productivity and increase workforce and customer engagement.

Strengths

- Easy to use with a consistent user experience across devices
- Full web and video conferencing capabilities
- Full UCC features including voice and telephony, globally
- Integrations with Dropbox, Box, Okta for SSO and auto-provisioning, CRM/ticketing systems (i.e. Salesforce), and other popular enterprise applications like Teams and Slack

Challenges

- Balancing focus on UCaaS vs. messaging

Mattermost

Mattermost continues to offer its enterprise-grade team collaboration platform that has evolved over the last year to become more of a digital work hub. In October 2021, Mattermost updated its platform to add new functionality, including channels (communication), playbooks (checklist focused workflow), and Boards, its task management capability.

Mattermost heritage is open source and it continues to enable deployments to be on-premise or in private or public clouds, such as AWS, Azure, and Google Cloud. Mattermost has made enterprise security a core part of its offering, and it also offers granular control of data.

Mattermost offers open source as well as three versions of its Enterprise Edition. Mattermost's initial account focus is on developers and IT professionals as early adopters, and it has seen solid growth in the developer community. Mattermost has a number of use cases it focuses on, including incident resolution, CI/CD, DevOps, IT Service Desk, and Test/QA. While government is the main industry it has focused on, it also targets defense, financial services, healthcare, legal, media and entertainment, among other verticals.

Strengths

- Self-managed cloud and on-premise deployment
- Ease of use
- Security
- Video and call support
- Third-party integrations
- Threaded discussions

Challenges

- Overall market awareness

Mitel

Mitel made a leadership change in November 2021 with Mary McDowell stepping up to become Chairman and appointing Tarun Loomba to be the new CEO. Additionally, it announced on November 9th that it was selling part of its intellectual property (network and call management, security and infrastructure) to RingCentral for \$650 Million.

As part of the deal Mitel will resell RingCentral Office as its primary cloud UCaaS offering. Mitel CloudLink architecture will allow Mitel customers choosing to migrate to cloud to integrate their existing on-premise systems with RingCentral MVP. Aside from offering RingCentral MVP as its UCaaS offering going forward Mitel will continue offering its on-prem Mitel UC Call Control, MiCollab and Mitel Contact Center solutions.

The Mitel and RingCentral alliance is unique to what others have done with RingCentral. Several key factors are unique about this partnership:

- Mitel and RingCentral are leveraging each other's already-existing strengths and do not have to spend time creating new products or solutions. This means Mitel and our customers have immediate access to RingCentral's Meeting and Video (M&V) solutions.
- Mitel plans for our full device/phone portfolio to be compatible with RingCentral MVP to further streamline the experience for customers.
- Mitel's CloudLink architecture will be tightly integrated with RingCentral's MVP solution to support Mitel on-premise customers' ability to move to the cloud at the pace that is best for them.

Mitel expects its growing partner network to continue to offer Mitel on-premise solutions along with the new RingCentral MVP offering to customers in education, government healthcare, and hospitality. Partnering is one of the new ways of go-to-market in the UC&C market. With RingCentral as its cloud partner, Mitel can focus on more of its core capabilities for its private cloud (on-premise) offerings and R&D innovation going forward.

Strengths

- UCC platforms (on-premises & cloud)
- User experience
- API Platform
- Internal and external use cases
- Real-time audio and video conferencing

Challenges

- Overall focus on team collaboration

Vonage

Vonage announced that Ericsson plans to acquire Vonage in an all-cash deal for \$6.2 Billion. The acquisition is expected to be completed during the first half of 2022. Vonage CEO Rory Read will continue to lead Vonage. Vonage's integrated team collaboration solution offers team messaging, file sharing, SMS, MMS, voice, and video, across any device. The Vonage Communications Platform includes UCaaS, CCaaS, and CPaaS, which enables the company to accelerate innovation across its portfolio. Vonage's integrated UCaaS and CCaaS offering provides a 'single pane of glass' experience for customers by consolidating the user interface for a fully-integrated experience for agents and back office employees.

More integrations for improved collaboration was the theme of 2021 at Vonage. Vonage Business Communications now integrates seamlessly with Microsoft Teams. The VBC for Teams offering includes premium calling features delivered via Vonage's direct routing, as well as SMS and MMS embedded directly into the Teams app. VBC for Teams also offers CRM and contact center integration.

Vonage Meetings, VBC's built in video conferencing solution has been seeing solid adoption and includes Vonage's integrated team collaboration solution that offers team messaging, file sharing, SMS, MMS, voice, and video on both the desktop and mobile app. With its full UC&C platform and a growing international presence, Vonage is well-positioned in the UC&C landscape.

Strengths

- UC&C platform
- UCaaS offering
- CCaaS offering
- Brand recognition
- API portfolio (voice, SMS, messages, video, 2FA)
- AI
- Integrations
- CPaaS API flexibility

Challenges

- Building awareness for its full portfolio

Zoom

Zoom has grown significantly over the last several years, and besides video conferencing, Zoom Phone has seen strong adoption on a global basis. Zoom also offers Zoom Chat for team collaboration for both free and paid customers. It is tightly integrated as part of the Zoom Platform and provides both persistent direct and channelized team messaging where users can send files and videos and easily support internal and external contacts. Coming soon are tighter office suite, cloud storage, and whiteboard integrations for Zoom Chat as was announced at Zoom's recent user conference, Zoomtopia.

Zoom also made breakout rooms a must-have capability. Its pre-COVID availability of these features allowed it to support enterprises during the pandemic. Zoom has seen its revenues growing to over \$4.0 Billion (projected). With Zoom Phone, which surpassed one million users in just seven quarters, and surpassed 2M seats as of September 2021, Zoom has evolved into a complete unified communications and collaboration provider with integration into leading line-of-business-applications such as Salesforce, ServiceNow, Zendesk, and electronic health record solutions such as Cerner and Epic to name a few. Zoom continues to leverage its growing App Marketplace (over 1,500 apps), which also includes voice AI offerings such as Chorus, Gong, and Otter.ai for analytics and live transcription (already native in Zoom). In September 2021, Zoom also announced its Video Engagement Center, its entry into the CCaaS market.

Zoom has continued to innovate its flagship video meetings offering, and in 2020, it helped hundreds of thousands of schools move to remote learning by removing any limitation on class size and meeting (class) duration. In the elementary, high school, and college markets, Zoom was able to adapt quickly during the pandemic and gained a strong position in the K-16 market. Despite its rapid growth, Zoom continues to innovate and release new features at an impressive pace.

Strengths

- Software-based video room systems
- Mobile apps
- Webinars
- App marketplace (over 1500 integrations)
- UCaaS offering
- Broad adoption and brand recognition across consumer and business sectors
- Ability to leverage its robust platform in new categories such as Zoom Events, which offers multi-day, multi-session events and conferences

Challenges

- Focus on team collaboration

Aragon Advisory

- Team Collaboration offerings should be evaluated both for their core capabilities and the ability to integrate with other applications. Evaluate team collaboration products on their ability to integrate with business applications, workflows, and processes.
- Conversational AI will power the next generation of chat bots. Evaluate team collaboration vendors in this area, in addition to core features.
- Enterprises should look carefully at vendor roadmaps to understand the overall investment being made in team collaboration.

Bottom Line

Team collaboration is overtaking email as the new way to get work done in a hybrid workplace. The market has evolved, and more and more providers go beyond messaging today to offer more of a full work hub, particularly for frontline workers. One of the biggest opportunities is to leverage chatbots and virtual agents to help get more work done. With the shift to team collaboration, enterprises should look at how work can be enhanced for both individual users and teams.

Aragon Research Globe Overview

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

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

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

Dimensions of Analysis

The following parameters are tracked in this analysis:

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

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

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

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

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

following three regions is the third dimension of the Globe analysis:

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

The market reach evaluation includes:

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

The Four Sectors of the Globe

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

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

Inclusion Criteria

The Aragon Research Globe for Team Collaboration, 2022 will help clients differentiate the many vendors who offer tools to let enterprises collaborate over mobile and desktop devices, asynchronously and in real-time.

The inclusion criteria for this Aragon Research Globe are:

- **Revenue:** A minimum of \$2 million in primary revenue for team collaboration or a minimum of \$7 million in revenue in a related market (collaboration, web and video conferencing).
- **Shipping product:** Product must be announced and available under current or previous brand name.

- **Customer references:** Vendor must provide at least three customer references using its team collaboration product.
- **Features:** Vendor should have at least six of the ten features listed under “Team Collaboration Features” above.

Vendor Inclusions

New vendors this year include:

- **8x8**

Vendor Exclusions

- **SamePage**