EXECUTIVE OVERVIEW

MARKET MAP

Business Productivity Software Market Map 2017

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Major disruption is occurring across the business productivity software landscape as vendors strive to balance usability expectations with enterprise-grade functionality and security. Distinct market segments are combining technological advances like pervasive intelligence and workflow automation with new approaches to empowering end users in an effort to drive process efficiency, optimize information and knowledge assets, and develop new experience standards across the digital workspace.

ABOUT 451 RESEARCH

451 Research is a preeminent information technology research and advisory company. With a core focus on technology innovation and market disruption, we provide essential insight for leaders of the digital economy. More than 100 analysts and consultants deliver that insight via syndicated research, advisory services and live events to more than 1,000 client organizations in North America, Europe and around the world. Founded in 2000 and headquartered in New York, 451 Research is a division of The 451 Group.

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CHRIS MARSH

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Chris Marsh sets the vision for and manages 451 Research's Workforce Productivity and Compliance practice. His own research focuses on workforce productivity software including the project, team, task, content and innovation management applications into which businesses are putting more of their data and workflows; general worker productivity suites like Microsoft's Office and Google's G Suite; technologies such as on-device workspaces, containers, partitions and endpoint management tools giving access to and providing security around productivity software; and the middleware technologies and workflow engines influencing how application experiences are designed and consumed. Before 451 Research, Chris was a research manager in Nokia's Global Consumer Analytics and Insights division.

Key Findings

Optimizing a workforce's productivity means not only saving time and energy, but inspiring maximum creativity, innovation and cultural engagement. An increasingly crucial part of this is empowering teams to self-organize, define individual and group processes and work across functional and hierarchical groups.

Contextualization continues to be emphasized across the landscape, as vendors stress interoperability and publish APIs capable of sharing and ingesting rich transactional information. Conversational interfaces continue to be the preferred method of enabling embedded communication and sharing data between application environments via bot triggers and workflows.

Support for the citizen developer will rise, as providers see individual employees as the key to designing shortcuts and redefining processes for maximum systemic efficiency.

Privacy and information security will come to the forefront as the quantity of data mined in every interaction rises. Security and governance protections, however, will become increasingly ambient so as not to detract from usability and experience.

Process-centric productivity applications that aim to build structure and purpose into collaborative interfaces will become more popular, challenging the providers that offer social tools purely for the sake of socializing.

Executive Summary

INTRODUCTION

Business productivity software as a market is focused on enabling individuals and teams to accomplish their professional responsibilities and goals with maximum efficiency. This market view encompasses a spectrum of services across which employees work, ranging from asset production and management, through information capture and collaboration, to process automation and delivery. Ultimately, these services focus on optimizing employee productivity and breaking down barriers in knowledge sharing to deliver deep workforce engagement and process digitalization. We identify and discuss five distinct technology segments: asset creation, content management and collaboration, structured work management, knowledge capture and communications, and immersive workspaces.

According to 451 Research's *Voice of the Connected User Landscape (VoCUL): 2H 2016 Corporate Mobility and Digital Transformation survey*, 61% of respondents have already developed or are in the process of developing a formal strategy for digital transformation. These businesses will take a critical look at the software tools and services central to business and employee performance, and evaluate their effectiveness on multiple counts. Are the applications driving efficiency and alignment with cultural and operational goals? Are they serving the people who use them, or do they perpetuate longstanding processes and policies? Is business strategy restricted by the limitations of tools at users' disposal? In an era where self-disruption and innovation must continually occur, enterprises are beginning to understand business productivity software as a key driver of cultural and operational differentiation.

Across the vendor field, the embrace of cloud computing, consumerization of business technology and open architectures has opened up opportunities for technology experiences that are as flexible and enjoyable to use as they are functional. Innovative new patterns of work are already emerging as businesses place the power to choose technology and design workflows in the hands of their employees. While many of these technologies are in early stages, we can see the outlines of a world defined by process automation and ambient connectivity, where the right software will be crucial to connecting the people, information and processes on which businesses run.

METHODOLOGY

451 Research Market Maps™ are designed to provide a view of the vendor landscape by major segment. The map highlights companies competing in multiple segments by connecting them through a circuit line. Identification and placement of companies into these segments is based on analysis, both published and unpublished, performed by 451 Research. This analysis includes interviews, reports and advisory work with several thousand enterprises, vendors, service providers and investors annually. 451 Research Market Maps™ are not intended to represent a comprehensive list of every vendor operating in this market. Inclusion on 451 Research Market Maps™ does not imply that a given vendor will be specifically featured in one or more 451 Research reports.

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