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## Collaboration Junction

Enterprises seek software to help users work together in real-time or anytime workgroups.

**By James R. Duhart**

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If you've heard it once, you've probably heard it a hundred times-"in order for this project, this team, this company to succeed, everyone has got to work together."

In today's interconnected corporate world, many software companies are trying to apply that homespun platitude to information sharing within or across enterprises. A relatively new field of software design- so-called "collaboration" software-has sprung up to help companies, their workers, partners, and customers team up on projects and tasks, be they separated by a few desks and office walls or scattered across the globe.

Easily the most pervasive-and in some ways most basic- form of collaboration software in use today is email, followed closely by or in partnership with general Internet access. A recent Gartner Group/Dataquest ([www.gartner.com](http://www.gartner.com)) study breaks down collaboration software into five somewhat overlapping segments. Real-time Collaboration, Gartner says, covers things like instant messaging, videoconferencing, and Web-based teleconferencing. Team Support includes software that groups various individuals into teams or workgroups, with permissions and controls based on an individual's inclusion in or exclusion from such a team. Information Access includes shared Web pages, intranets, extranets, and various ways in which to distribute content among many individuals at once. Content Management/Document Management deals with document libraries, version control, the distribution of documents, and content. Gartner's fifth category-the largest in terms of current enterprise penetration-is Email and Calendaring.

According to Dataquest, total worldwide revenues for new license sales for all five general categories of collaboration software in 2001 was about \$3.25 billion, an overall growth rate of about 2% over 2000. Burke Oppenheimer, a senior analyst at Dataquest who follows the collaboration software market, says that while that growth rate may not seem impressive at first glance, taken in context it is quite heartening. Given the global economic slowdown of 2001, terrorist attacks and increasing profit pressure on companies, Oppenheimer calls 2% growth "a pleasant surprise." Other enterprise software segments studied by Dataquest, he says, suffered declines of up to 30% over the same period.

Dataquest also measures each segment's share of the overall collaboration software market, along with the growth rates of each segment. Email and calendaring account for the largest segment, a full 56% of all new license sales, but with a negative 2001 growth rate of 1%. Collaborative Content Management and Document Management grew by 3% from 2000 to 2001, and accounted for 21% of overall revenue. Information Access grew by 4%, with 10% of the overall market, while Team Support software grew by 5% and constituted 5% of the market. Real-time collaboration grew by the largest amount- 15%-but accounts for only 8% of the overall collaboration software market.

### Real-time and Anytime

Joby O'Brien, vice president of Business Development for collaboration software vendor iMarkup ([www.imarkup.com](http://www.imarkup.com)), makes a distinction between real-time and "anytime" collaboration. Most collaboration today is still done in the anytime mode, he notes, again with the prevalent collaboration tool being e-mail. Anytime tends to work best for most projects, because with far-flung participants, collecting everyone-or even a necessary quorum-to participate in real-time collaboration can be challenging. "Anyone who has tried to do a conference call and make sure everyone gets on the phone at the same time knows what I'm talking about," O'Brien says.

"Getting everybody to agree to one schedule and one time is rare." [For more on this topic, turn to page 30 for Joby's article on "[Collaboration Tools.](#)"]

Real-time collaboration, on the other hand, does offer some advantage. "We see it serving an important niche," O'Brien says. "You can resolve problems right away and have a resolution immediately. That can be attractive, but what you really need is the ability to do both real-time and anytime and mix them together."

That is exactly what Marty Morrow, president and CEO of collaboration vendor Quovix ([www.quovix.com](http://www.quovix.com)) is attempting to do. Morrow notes that in a global or multi-location environment, real-time can become something of a anytime becomes the default means of collaboration. "The fact of the matter is that most people are occasional collaborators anyway," Morrow notes. "They have to be able to pop in on their own time, make the contributions they need to make, and then pop out." Another factor Morrow finds critical is that collaboration software must be simple to understand and easy to use. "Most people are quickly blown away by the features," he says. "They won't use 80% to 90% of the features, so you have to make it very easy to participate."

Stellent ([www.stellent.com](http://www.stellent.com)), a content management and collaboration management vendor, provides that ease of use and combined real-time/anytime collaboration through the creation of what amounts to Web pages tied to specific enterprise projects or teams. Dan Ryan, vice president for Marketing and Business Development for Stellent, says the company's software lets users create "temporary websites" into which they can invite others, control workflow and document libraries, and collaborate using both real-time tools such as instant messaging and anytime tools like Web pages or email.

"It's pretty important that using collaboration tools not take a lot of training," Ryan says. "We use a Web interface and the same type of folders metaphor you would see on most computers today. It has to be to where a user can open up a Word document and save it to the collaboration server without even realizing they are interacting with the system."

Anytime collaboration offers at least one significant advantage over real-time collaboration, Ryan says, in that by its nature anytime creates an automatic archive of what has been done. Emails that have been sent, calendar appointments that have come and gone, and documents that have been reviewed or signed off on are all recorded by the collaboration server, allowing companies to go back and re-create any single point in time during the collaborative process. With real-time collaboration, as in the case of instant messaging or that most low-tech and basic form of real-time collaboration-speaking face-to-face with someone as part of an unrecorded conversation-much of the data is lost once the collaboration has ended.

### **Who's Collaborating?**

Eric Chaffee, product marketing manager for Stellent, says the company sees collaboration both within a single enterprise and between two or more enterprises. Even within a single enterprise, though, collaboration is almost always cross-departmental. "If you are in manufacturing, you have engineers and marketing people dealing with the same product at the same time," Chaffee says. "You do not necessarily want to have to give marketing a full CAD implementation, but you may want them to be able to access a CAD drawing of the product. Using a collaboration server, we can turn the CAD document into a PDF, and then compress it and move it around." Another way in which collaboration systems connect people and documents, Chaffee says, is in providing content management functions such as version control, access control, and document check-in/ check-out based on permissions that are set as part of an individual's role on a collaborative team.

The merger of content management and collaboration management systems is also what Mark Portu, vice president of the affinity program for Open Text Corporation ([www.open-text.com](http://www.open-text.com)), is trying to do in the collaborative software space. "We came out of the document management field, and a lot of this started as discussion threads, then we added workflow to automate the processes," Portu says. "Back on the DM [document management] side, you need to be able take things off-line once you reach a certain level. We think you need a mixture of synchronous and asynchronous systems, and you need a strong underlying infrastructure to make it all happen."

By way of example, Portu points to a typical off-line versus online meeting. Using collaboration software tools, he says, online meeting participants can trade reading materials prior to a meeting, can know ahead of time who will attend the meeting, keep all the notes taken during the meeting, produce copies of all whiteboard sessions, and even collect and display post-meeting comments and suggestions. "A lot of that does not happen with real-time meeting tools," Portu says. "Using collaboration tools, you can turn meetings into a core component of any product development or project management process."

Open Text's collaboration customers, Portu says, tend to be Global 2000 clients in the pharmaceutical, finance, high-tech, and manufacturing industries, as well as in government. A surprising new entrant to the collaboration field, though, is the construction industry. "That came out of left field for us about eight months ago," Portu says. "They have a real need for this. The construction industry consists of highly fragmented, fractured groups that all have to work together on different projects. You need to have a single repository of data, of engineering drawings, schedules, and work requirements, and you have to be able to get at it anywhere, using the Web or wireless technology."

The construction industry has also taught Open Text two important lessons about collaboration software, Portu adds. One is that the user interface must be simple, friendly, and straightforward. Construction workers, he says, are not going to spend the time to learn new systems from a construction site trailer, and if the software is clunky or hard to learn, they simply won't use it. Another lesson is that there is great value in collecting, tracking, and being able to audit data, something that has been sorely lacking in the construction field for decades.

Quovix' Morrow offers a couple of even more arcane uses of collaboration software. One use is by a company in the environmental reclamation business, a company that collects used industrial materials and then cleans up and resells those materials to others who may be able to use them. "This company has to be very flexible in solving their customers' problems," Morrow cautions. One of the firm's customers, for instance, may need zinc, while another wants to find a way to rid itself of zinc or some other byproduct it cannot use economically. "They are tying together every employee across every individual company," Morrow says of the reclamation firm. "Someone in Poughkeepsie might have information on how to deal with that particular compound, and can offer suggestions as to what to do with it. This is all being done online and real-time. They are turning the whole work force of all their customers into one fluid company."

An even better example, Morrow says, is a gold mining company he read about that is making their geological data available to geologists around the world, asking other geologists where they should dig next, presumably offering some type of reward or compensation to suggestions that result in gold finds. "This company's hit rate in the past was 2% to 4%," Morrow says. "They have had four test projects that were suggested by collaborators and they have hit gold on all four."

## **Worldwide Collaboration**

Metaphorically or realistically striking gold with collaboration software is much more likely today in North America than in other parts of the world. Portu says Open Text does about 60% of its collaboration software business in North America, another 35% in Europe, and about 5% in the rest of the world. John Richardson, project director for London-based content and document management analysis firm Strategy Partners ([www.strategypartners.com](http://www.strategypartners.com)), says there is a general feeling that Europe is about 12 to 18 months behind the North America in the adoption of collaboration software. Collaboration may not be as hot in Europe at present, he speculates, because the region has smaller national markets and thus not the same need for collaboration across numerous time zones or large geographic regions. Language barriers in Europe may also play a role, he says. In England, Richardson sees collaboration software growing among law firms, including firms with as few as 100 or 120 employees.

Vernon Imrich, chief technical officer at collaboration vendor Percussion Software, says he sees collaboration software quickly moving into the small and medium-sized enterprise space. "The history of collaboration has been that it has been most appealing to large enterprises," Imrich says. "But you also have this sort of unofficial expansion of AOL IM [Instant Messenger]. Whether companies realize it or not, collaboration is happening in all companies, regardless of their size."

Imrich, in fact, believes the day will soon come in which all software is assumed to be collaborative. Stellant's Chaffee agrees, saying that the end-user benefits of collaborative software will be so compelling that the field will see rapid adoption over the next six to twelve months and beyond. "It is going to be very viral," he says. "There is going to be a real rapid acceptance, as people in one department get invited to one collaborative project, and then they bring that back to their department as the way to do things."

"Everybody is interested," says Portu. "Are all of our customers interested in this? Absolutely."

"Almost everyone is looking for some type of collaborative solution," adds O'Brien. "Working the trade shows, this seems to be the number one type of software people are looking for. After all, when it comes right down to it, everyone has to work with others."

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SIDE BAR

### **The Need for Human Activity-Steps within BPM**

By Eric Westerkamp

It is increasingly being recognized that business process management (BPM) currently fails to exploit its full potential. Generally, according to Gartner, 50% of integration-suite-delivered BPM implementations will require some level of human activity-step functionality (Business Process Management: Responding in 2002 December 13, 2001, D. McCoy, Gartner Inc.). However with their focus on transactional data automations, BPM vendors have largely overlooked these capabilities. As Gartner puts it, "vendors have yet to build complex human support." Human support, also called human activity-step functionality, can be defined to include:

- document-based interactions and management (including human-based workflow)
- content management
- collaboration
- image capture, storage and retrieval
- human exception handling