The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016

The 13 Providers That Matter Most And How They Stack Up

by Margo Visitacion
October 17, 2016

Why Read This Report

In our 25-criteria evaluation of enterprise collaborative work management (CWM) providers, we identified the 13 most significant ones — Asana, Atlassian, Clarizen, Huddle, LeanKit, LiquidPlanner, Microsoft, Planview, Redbooth, ServiceNow, Smartsheet, Workfront, and Wrike — and researched, analyzed, and scored them. This report shows how each provider measures up and helps enterprise architects, marketing professionals, and information workers requiring collaborative task management make the right choice.

Key Takeaways

Clarizen, Redbooth, Wrike, Planview, Asana, and Smartsheet Lead The Pack
Forrester's research uncovered a market in which Clarizen, Redbooth, Wrike, Planview, Asana, and Smartsheet lead the pack. LeanKit, Atlassian, Microsoft, Workfront, ServiceNow, Huddle, and LiquidPlanner offer strong options.

Information Workers Are Looking To Collaborate With A Purpose
The CWM market is growing because more information workers see CWM as a way to enable them to organize. This market growth is in large part due to the fact that enterprise architecture pros increasingly trust CWM providers to act as strategic partners and advise them on top CWM decisions.

Flexible Workspaces, Proofing, And Integration Are Key Differentiators
As organizations become more cross-functional in nature, flexible workspaces, proofing, and integration enable teams to work together in the way that works for them, regardless of approach or location.

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016

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by Margo Visitacion
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Table Of Contents

Notes & Resources

Forrester conducted product evaluations in July and August 2016 and interviewed 13 vendor companies: Asana, Atlassian, Clarizen, Huddle, LeanKit, LiquidPlanner, Microsoft, Planview, Redbooth, ServiceNow, Smartsheet, Workfront, and Wrike.

Related Research Documents

BT Portfolio Management Best Practices Support Agile Delivery

Increase Your Value: Become The Modern, Agile PMO

Vendor Landscape: Collaborative Work Management For The Enterprise

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The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

October 17, 2016

CWM Enables Teams To Share Content In The Context Of Work

Customer-obsessed firms take an outside-in approach, relying heavily on collaboration, to deliver desirable products and services. Product, marketing, and technology teams exchange information with a wide circle of people, both internal and external to the company. Employees spend 13% of their time creating emails, documents, and presentations and 11% reading them.[1] Email remains the primary vehicle for sharing information: 77% of information workers use email to communicate internally, and 76% use it to share information with external partners — and they do so frequently. Twenty-six percent of respondents are on email at least several times a day, and 53% are on it constantly; these interruption-driven activities reduce the amount of time spent on an actual task activity to a mere 18%.[2] CWM provides an antidote to email disruptions, as it allows users to:

› **Create a workspace for teams to collaborate in order to deliver an outcome.** Whether it's a project or a repeatable business process such as customer service or onboarding new employees, people need a way to organize their work.[3] The CWM market provides solutions that enable teams to have a centralized location to work collectively and share digital content deliverables such as documents, presentations, web content, and videos. Integration with content management solutions such as Box, Dropbox, Google Drive, and Microsoft SharePoint provides file sync and share capabilities. With all content associated with the workspace or task, teams reduce time wasted searching for attachments in email.

› **Capture conversations in the context of the work they're performing.** Comments and instant messages are automatically associated with the workspace, reducing the need to search through email threads to find related communications. Users can add contributors with a subscription license to the discussion thread with an @mention, and they can get feedback from external users via an email containing a link that will add comments to the thread.

› **Plan and manage projects without having to adhere to a formal methodology.** The vast majority of information workers are casual project managers, meaning they lack formal training, and for them, traditional project management tools add overhead to the work they need to deliver. Some CWM tools offer Gantt scheduling capabilities, but users can plan and schedule using task lists or calendars or leverage a card view similar to Kanban (Japanese for a decorated board) that allows teams to visualize and monitor their capacity for planned work by work stream.

› **Personalize the workspace to support the way an individual works.** Information workers use an average of eight applications to perform their jobs, with Microsoft Office programs leading the pack. According to the American Psychological Association, the mental blocks caused by switching tasks drops productivity by 40%.[4] CWM solutions reduce some of the switching by consolidating a person's tasks, to-dos, communications, and content analysis into a single workspace that the user can configure based on personal preferences.

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The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

October 17, 2016

Enterprise Collaborative Work Management Evaluation Overview

To assess the state of the enterprise CWM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top CWM vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 25 criteria, which we grouped into three high-level buckets:

› **Current offering.** The vendors we included in this evaluation combine collaboration and task management to organize planned and unplanned work. We looked at how they enable creating work plans out of ad hoc conversations and how they enable users to collaborate on projects or individual activities. We also examined how teams can use CWM tools to collaborate with external users like customers, partners, and suppliers. Our evaluation included assessing the breadth of collaboration capabilities, permissions, and deployment options.

› **Strategy.** New vendors are entering the CWM market in a steady stream. The vendors we evaluated needed a strong product vision and a road map dedicated to streamlining how information workers get their jobs done, coupled with providing capabilities to bring transparency to the enterprise. We weighted integration more heavily because the ability to access important content and data, have conversations, and perform activities within a unified workspace creates an application that becomes essential to team members wherever they work.

› **Market presence.** Install bases vary wildly in this market, so we focused on vendors that demonstrated the ability to convert viral growth to enterprise implementations and consistently strong subscription renewals.

Evaluated Vendors And Inclusion Criteria

Forrester included 13 vendors in the assessment: Asana, Atlassian, Clarizen, Huddle, LeanKit, LiquidPlanner, Microsoft, Planview, Redbooth, Smartsheet, ServiceNow, Workfront, and Wrike. Each of these vendors has a product that enables (see Figure 1):

› **Conversations that trigger the need for action.** Whether generated from email, chat, a call center ticket, or a logged defect, these conversations form the foundation of a team space containing all collaboration, feedback, tasks, and commitment dates. Creators can invite internal employees or external users (e.g., clients or contractors) to view and participate in the conversation thread as it evolves. The thread becomes the system of record for teams managing their work and content collaboration. Communication originates from within the system and is captured so critical contextual information isn't lost in disconnected emails.

› **Planned work that requires a great deal of collaboration.** This work can be part of either a project or daily planned activities. Users can create a task list or a formal project plan and invite internal stakeholders, contractors, or clients to participate on allocated tasks and add, review, or

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The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

October 17, 2016

edit content. Project and department managers can track what their resources are working on and review conversations to track progress with complete transparency into the work items. Team members can add ad hoc tasks outside of the project to organize their workdays.

› **Work allocation at the team level.** This capability enables teams to understand their capacity to take on new activities that are either part of planned projects or day-to-day activities. To understand true capacity, end users can add personal work items to their calendars that may curtail their ability to take on new assignments.

FIGURE 1 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product name
Asana	Asana
Atlassian	Jira, Confluence, HipChat
Clarizen	Clarizen
Huddle	Huddle
LeanKit	LeanKit
LiquidPlanner	LiquidPlanner
Microsoft	Office365
Planview	Projectplace
Redbooth	Redbooth Business
ServiceNow	ServiceNow Platform
Smartsheet	Smartsheet
Workfront	Workfront
Wrike	Wrike Enterprise

Product inclusion criteria

• Enables conversations that trigger the need for action
• Supports planned work that requires collaboration
• Features work allocation at the team level

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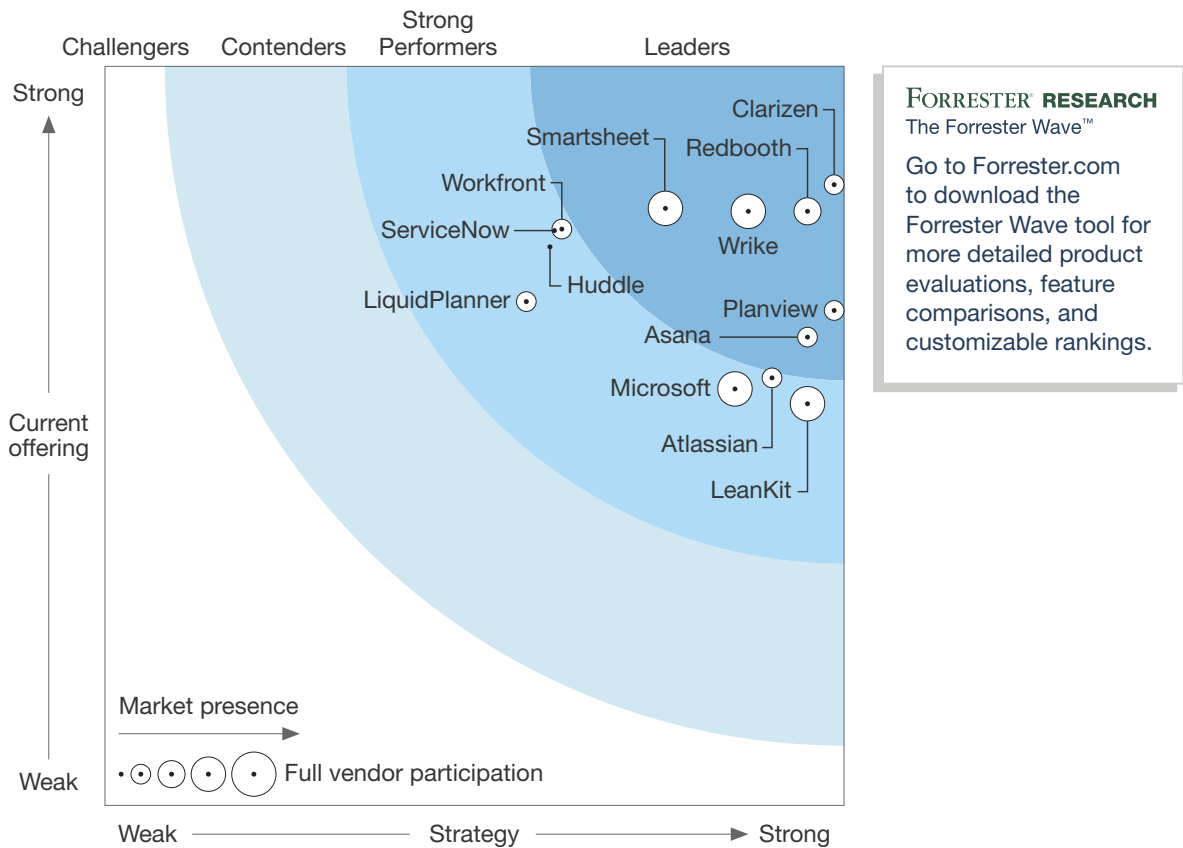
October 17, 2016

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

Vendor Profiles

This evaluation of the CWM market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave™ Excel-based vendor comparison tool (see Figure 2).

FIGURE 2 The Forrester Wave™: Enterprise Collaborative Work Management, Q4 '16

FOR ENTERPRISE ARCHITECTURE PROFESSIONALS

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

October 17, 2016

FIGURE 2 The Forrester Wave™: Enterprise Collaborative Work Management, Q4 '16 (Cont.)

	Forrester's weighting	Asana	Atlassian	Clarizen	Huddle	LeanKit	LiquidPlanner	Microsoft	Planview	Redbooth	ServiceNow	Smartsheet	Workfront	Wrike
Current offering	50%	3.15	2.92	4.18	3.76	2.70	3.39	2.80	3.33	4.00	3.87	4.02	3.88	4.00
Collaboration	25%	3.10	3.15	3.90	3.40	2.20	2.30	3.15	2.30	3.40	3.25	3.10	3.95	2.20
Content collaboration	18%	3.00	2.15	5.00	3.95	3.00	3.00	2.15	3.00	3.85	3.00	4.90	3.10	5.00
Work management	15%	3.20	2.10	5.00	2.10	3.90	5.00	3.20	4.10	3.20	3.00	3.20	5.00	5.00
Team management	5%	3.00	3.00	5.00	3.00	4.00	5.00	4.00	5.00	5.00	5.00	5.00	5.00	4.00
Reporting	3%	3.00	5.00	5.00	3.00	3.00	5.00	3.00	5.00	1.00	5.00	3.00	5.00	5.00
Globalization	3%	2.00	5.00	5.00	5.00	2.00	3.00	2.00	5.00	5.00	4.00	5.00	5.00	2.00
Security	1%	5.00	3.00	5.00	5.00	5.00	3.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00
Cloud	3%	3.00	3.00	3.00	3.00	5.00	3.00	3.00	3.00	5.00	5.00	3.00	3.00	3.00
Mobile	5%	5.00	4.00	4.00	5.00	5.00	5.00	0.00	5.00	5.00	5.00	3.00	5.00	3.00
Integration	22%	3.00	3.00	3.00	5.00	1.00	3.00	3.00	3.00	5.00	5.00	5.00	3.00	5.00
Strategy	50%	4.75	4.51	4.93	3.01	4.75	2.85	4.26	4.93	4.75	3.04	3.79	3.09	4.35
Go-to-market strategy	60%	5.00	4.60	5.00	2.60	5.00	2.20	4.60	5.00	5.00	3.40	3.40	2.60	5.00
Cost	15%	5.00	5.00	4.50	3.00	5.00	3.50	5.00	4.50	5.00	0.00	5.00	3.50	4.00
Customer satisfaction	25%	4.00	4.00	5.00	4.00	4.00	4.00	3.00	5.00	4.00	4.00	4.00	4.00	3.00
Market presence	0%	3.08	1.78	1.13	0.46	3.67	1.36	3.06	2.00	2.35	0.54	3.17	1.87	3.44
Installed base	45%	2.00	0.30	1.30	0.80	4.70	1.20	5.00	2.20	2.00	0.00	2.80	1.50	2.80
Revenue	45%	4.40	3.20	1.20	0.00	3.00	1.60	1.80	1.80	3.00	1.20	3.80	2.20	4.40
Employees	10%	2.00	2.00	0.00	1.00	2.00	1.00	0.00	2.00	1.00	0.00	2.00	2.00	2.00

All scores are based on a scale of 0 (weak) to 5 (strong).

FOR ENTERPRISE ARCHITECTURE PROFESSIONALS

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

October 17, 2016

Leaders Provide The Most Robust Collaboration And Flexible Task Management

› **Clarizen leads the pack in enterprise collaborative work management.** A strong performer in project portfolio management (PPM), this vendor also shines in CWM, allowing organizations to get tremendous visibility into both planned and ad hoc activities. Clarizen's ability to connect employees, partners, and customers in secure workspaces drives greater productivity coupled with a rewarding user experience. A strong yet intuitive UI enables users to adapt the product to support multiple formal project delivery practices, lightweight task management for repeatable business processes, or personal tasks from their personal workspace.

Collaboration capabilities are especially strong. The product supports proofing capabilities that allow teams to collaborate without ever leaving the product, thus reducing the need for face-to-face meetings. The vendor's mobile offering is highly intuitive and enables users to perform the same work activities as they would at their desks. With follow-the-sun support and multilanguage and multicurrency functionality, Clarizen is well suited for globally distributed organizations that require both top-down planning and bottom-up collaborative work management.

› **Redbooth shines in combining collaboration and managing activities.** Redbooth enables organizations to radically simplify the way they manage work activities. The product allows teams to develop a single workspace in which they can bring together all elements of communication — from discussion threads, comments, instant messaging, and file sharing, to videoconferencing and phone conversations — without leaving the workspace. The product considers a project a workspace but does not require users to use a predefined methodology to frame the way they plan work. Users can invite external users such as customers or suppliers to participate in tasks or comment on content without requiring a subscription.

Users can manage personal tasks on a dashboard that also displays work allocated from other people. Redbooth leverages robust integration with all major email and file sync and share vendors as well as integrations with vendors like Evernote and Zendesk to provide wider collaboration and activity tracking support. Mobile functionality is fully optimized on both iOS and Android. The product supports translations into 10 languages and supports two currencies, the US dollar and the euro.

› **Wrike provides solid support for tasks, projects, and document collaboration.** The product enables teams or individuals to track tasks via a Kanban-style dashboard that provides visibility into what each person on the team is working on. Users can promote comments and discussions to tasks and allocate them to anyone invited to contribute to an activity. Wrike provides real-time collaboration via a document editor within the application and integrates with most major content storage vendors. Communication is also in real time, with messaging within tasks and projects. Users have the ability to invite external users in two ways: 1) grant them the same privileges as internal users but allow them to see only users who share common tasks and projects or 2) with a free collaborator seat, allow them to view tasks or files and comment on or mark up files but not create or share tasks or projects.

FOR ENTERPRISE ARCHITECTURE PROFESSIONALS

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

October 17, 2016

The vendor's mobile capabilities mirror the browser, enabling productivity remotely. The product supports team capacity management through viewing a group's workload or availability calendars. It delivers reporting either using preconfigured reports or filtering data to build a custom report. The product offers support for eight languages.

› **Planview balances work and collaboration for a well-designed experience.** Projectplace, Planview's CWM offering, enables users to create workspaces that can house timelines and Kanban cards for Agile or simple task management. Collaboration is at the core of the product for both browser and mobile use. The workspace owner can invite anyone with an email account to contribute to all content that the owner provides permission to access.

Projectplace offers a number of out-of-the-box reports, or users can leverage its content package for Microsoft Power BI. Team-level capacity management is a particular strength, as administrators and managers can view commitment capacity across all workspaces. Team members can relay capacity back to management by providing a self-assessment of availability via a "slam factor" indicator. The product provides robust security capabilities, and with localized support for nine languages and more than 100 currencies, the product can support global organizations.

› **Asana simplifies team-based work management.** Easy creation of personal, team, and project workspaces allows users to organize their work into shared projects for almost any type of initiative. Because the product does not subscribe to any specific workflow, users can structure activities based on the type of work needed, and custom fields allow customization of the user experience. Collaboration capabilities include sharing work details, due dates, and activities. File collaboration occurs by either attachment to the workspace or via a link to a file sharing site. The product supports task allocation through @mentions in comments, email, or team assignment. Users can allocate tasks to multiple projects and to multiple people at the same time.

To monitor team workload capacity, users can search and view projects or tasks by assignee. All users can view another person's publicly allocated tasks. Dashboards and advanced search provide reporting capabilities; searches can be saved as reports that update in real time. Asana supports fully optimized mobile solutions for both iOS and Android. The vendor offers a public cloud offering via Amazon Web Services, which provides standard enterprise administrator functionality. The vendor does not currently offer localized UI or multicurrency support; however, it does provide Unicode text support and international date formatting.

› **Smartsheet focuses on project and team workspaces.** Designed for users who like the experience of traditional spreadsheets but are hoping to manage multiple team members' work, Smartsheet allows users to track conversations at a row, sheet, or workspace level and to attach relevant files as needed. These workspaces can be shared with internal and external users via email. Smartsheet also provides resource management capabilities to give project managers an easy overview of their team's workload. Project managers are automatically alerted when their resources are overallocated. Smartsheet provides rich mobile solutions for both iOS and Android. It also provides robust security capabilities and a wide range of customer support programs.

FOR ENTERPRISE ARCHITECTURE PROFESSIONALS

October 17, 2016

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

Strong Performers Provide More Specific Use Cases

› **LeanKit provides versatile work planning and collaboration for Lean organizations.** The product leverages Kanban boards to visualize any type of work planning. Users can define their own workflow processes on a board to provide real-time, shared insight into both planned and ad hoc activities. LeanKit supports collaboration through various functions such as discussion threads, mobile collaboration, or emailing cards to individuals or directly to the board. Content collaboration occurs by accessing a link within the card that takes the user to file sync and share tools that include Box, Dropbox, and Google Drive.

Team capacity management is viewed through team boards that show the number of cards assigned to a team. Once a team member is assigned to a card, his avatar will display on the card. External users require a subscription to access boards, but users outside the system can receive emailed cards and respond to the card via email. Reporting is robust with built-in application metrics. The vendor offers both private and public cloud access and has flexible integration with such tools as IT service management, issue tracking, requirements management, and testing tools. LeanKit offers multilanguage support but does not support multiple currencies.

› **Atlassian gives users and teams a place to categorize content.** Through its combination of Confluence, Jira, and HipChat, Atlassian allows users to track tasks, manage workloads, and collaborate on files. It provides two types of spaces: site spaces for users to create content and collaborate with others and personal spaces for all Confluence users where they can keep work private or make it public so others can view and edit. HipChat has a guest user feature, which allows external users to join a conversation and collaborate directly on ongoing work. Jira allows administrators to track workloads through time spent on tasks, due dates, and a variety of customizable criteria. Atlassian's iOS and Android applications make it easy for users to work cleanly between mobile and desktop.

› **Microsoft's Planner shows promise.** Planner is part of the Office 365 platform. Office 365 groups provide the platform for creating collaborative workspaces that include a shared inbox for group email communication via Outlook. Planner leverages SharePoint for working on group files and folders and OneNote for notes. As of the time of this evaluation, it does not support guests and contributors.

Planner provides support for planning tasks for teams, offering a card view for the team workspace; however, only one person can be allocated to a task at a time. Users can group tasks into buckets that can map to business processes and see who is working on a particular task by sorting and searching fields. Today, team capacity planning requires Microsoft Project Online. The product is offered in Microsoft's public cloud. Planner is localized in 37 languages but does not provide currency support.

› **Workfront offers a solid option for teams and the enterprise.** Workfront provides a varied role-based product that supports a number of work and collaboration needs. Executives and stakeholders have access to reports and dashboards to see statuses needed for decision-making.

FOR ENTERPRISE ARCHITECTURE PROFESSIONALS

October 17, 2016

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

Production, traffic, or project managers own workspaces and projects. The project manager role has the ability to manage capacity and work allocation. Team members can work in their team or personal workspaces and can commit or change dates or request that a task be allocated to someone else. Discussions, comments, and files are stored in the workspace so that teams can share information in the context of the project. Internal or external requesters have access to dynamic forms to send files and comment.

Like Clarizen and Planview, Workfront also offers portfolio management capabilities to link top-down and bottom-up work activities and provides multilanguage and multicurrency support. Its mobile offering mirrors browser capabilities. Workfront has a public cloud offering as well as a managed services offering that provides a private cloud environment.

› **ServiceNow provides strong collaborative work management as part of its platform.** For organizations already invested in ServiceNow, collaborative work management is already at their fingertips. Tasks are a consistent concept throughout the platform. Users can start by creating a task within the Visual Task Board or begin collaborating via the Connect collaboration environment that also supports real-time chat and document delivery from within the ServiceNow application. Conversations and documents are accessible in a single workflow and user interface. Users can connect with the coworkers privately and via group chats and leverage real-time presence to see who is working in the system via active lists.

Visual Task Boards present a Kanban-like view of cards that users can drag and drop to promote or reprioritize work and show changes in progress in real time. Work audit trails allow task assignment via @mentions to collaborate together, and all information stays inside records, allowing users to stay notified. Team capacity is viewed across the board, with avatars viewable on each card. Users can also follow a task card and use timely notifications to stay alert or go mobile across devices. The platform offers both predefined and custom reporting. ServiceNow offers full global multilanguage and multicurrency support.

› **Huddle centers the conversation on content.** Huddle's product focuses on team workspaces, which contain folders and files that have a full activity history, comment stream, and formal approval workflow built in. Users are assigned to one or more teams where permissions are set to govern access to documents within a given workspace or folder. External users can be invited to Huddle in the same way as internal users and assigned to teams with the necessary user privileges. Huddle also offers reporting capabilities to allow users and administrators to track document and user activity, storage consumption, and document status. The vendor has dedicated teams for iOS and Android mobile applications, which are built to keep team members in the loop when they are away from their main devices.

› **LiquidPlanner connects conversations and tasks.** LiquidPlanner users have a clear home page where they can view comments, work they are interested in, and priority tasks that have been assigned to them. LiquidPlanner users can "@reply" to team members to communicate directly on projects and tasks. Users have private, personal to-do lists, which they can turn into a larger

FOR ENTERPRISE ARCHITECTURE PROFESSIONALS

October 17, 2016

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

project as needed. LiquidPlanner provides multiple out-of-the-box reports, dashboards, and customized analytics and allows users to export personalized dashboards. The vendor offers native integrations with major services including Google Drive, SharePoint, and Salesforce. LiquidPlanner also offers a free mobile application for iOS and Android users.

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Supplemental Material

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

FOR ENTERPRISE ARCHITECTURE PROFESSIONALS

October 17, 2016

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by September 30, 2016.

› **Hands-on lab evaluations.** Vendors spent one day with a team of analysts who performed a hands-on evaluation of the product using a scenario-based testing methodology. We evaluated each product using the same scenarios, creating a level playing field by evaluating every product on the same criteria.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

FOR ENTERPRISE ARCHITECTURE PROFESSIONALS

October 17, 2016

The Forrester Wave™: Enterprise Collaborative Work Management, Q4 2016
The 13 Providers That Matter Most And How They Stack Up

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] Source: Forrester's Global Business Technographics® Applications And Collaboration Workforce Survey, 2015.

[2] Source: Forrester's Global Business Technographics Applications And Collaboration Workforce Survey, 2015.

[3] When the customer is the central focus of a company's strategy, its employees must work together more efficiently. Every day, employees focus their activities on helping their companies win, serve, and retain customers, even if the employees aren't engaging face-to-face. See the "Vendor Landscape: Collaborative Work Management For The Enterprise" Forrester report.

[4] "Doing more than one task at a time, especially more than one complex task, takes a toll on productivity. Although that shouldn't surprise anyone who has talked on the phone while checking email or talked on a cell phone while driving, the extent of the problem might come as a shock." Source: "Multitasking: Switching Costs," American Psychological Association (http://www.apa.org/research/action/multitask.aspx).

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

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