

IDC MarketScape: Worldwide Team Collaboration Applications 2024 Vendor Assessment

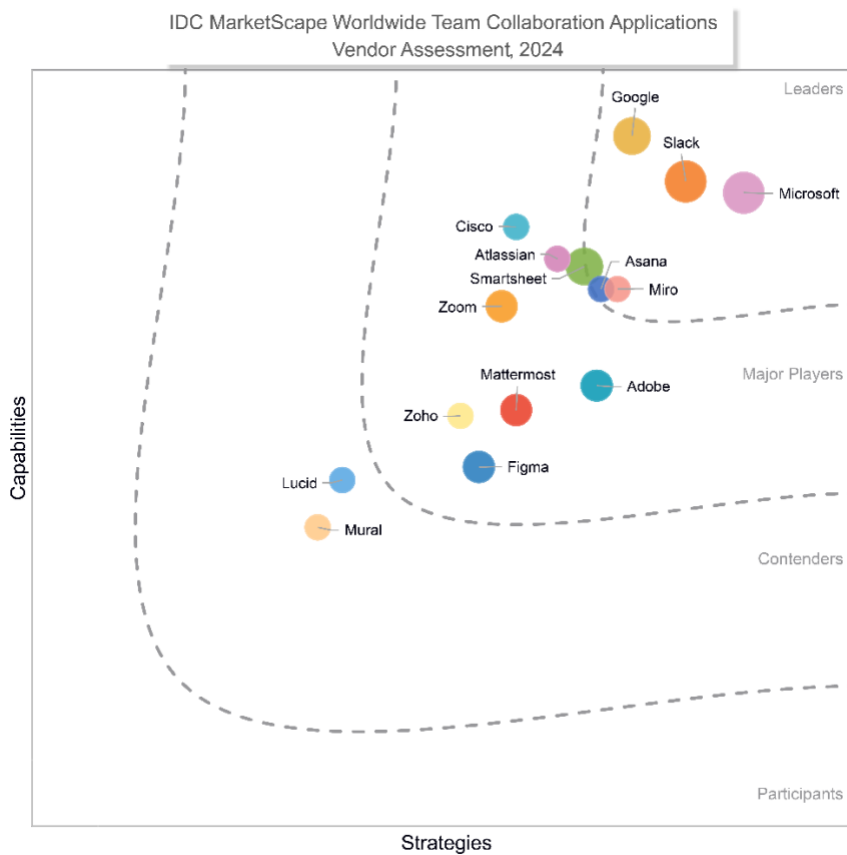
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THIS IDC MARKETScape EXCERPT FEATURES: SLACK

IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape Worldwide Team Collaboration Applications Vendor Assessment



Source: IDC, 2024

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Please see the Appendix for detailed methodology, market definition and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Team Collaboration Applications 2024 Vendor Assessment (Doc #US51405624e). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Team collaboration applications connect a workforce with more than just text. These applications now use varied and rapidly evolving communication modalities. In addition to messaging, visual collaboration and workflow solutions are frequently integrated together to drive work visibility and alignment, effective communications and productivity. A wave of *collaborative optimisation* has companies adding applications that help each function work best across internal silos and directly with customers and partners. These applications are integrated to become a collective single source of truth, and both better inform the workforce and help ground artificial intelligence (AI).

This IDC MarketScape for team collaboration applications, supported by additional IDC research, shows most companies have almost seven different collaborative applications. Technology buyers should read this study with consideration of using multiple products from this research in your enterprise.

Vendors participating in this research have shown strong growth in AI and an array of other features that bridge what is next to come in the connected enterprise.

Key findings in this research:

- **Robust security and governance features:** Robust security and governance features need to be granular and easy to deploy and manage. Regional support for content and AI governance are table stakes.
- **Trust is still paramount:** Trust is the differentiator in AI solutions that vendors have selected, specifically around security and data leakage issues. Lack of trust results in prolonged proof-of-concept deployments.
- **Connect or be connected:** Companies that fail to have rich interoperable and equitable APIs or connectors that allow live bidirectional data flow between

systems will eventually create their own headwinds and be seen as a closed product/ecosystem.

- **Pricing experience:** Many companies offer corporate pricing, which they believe is easy to navigate; but customers have a much different perception. AI complicates this further.
- **A modern, intuitive interface:** A modern, intuitive interface is viewed significantly more favourably by users. Customers across most products believe that current user interfaces are getting harder to navigate. Some interfaces, even for popular products, are reported as looking 'dated'.

IDC MARKETScape VENDOR INCLUSION CRITERIA

Companies listed in this IDC MarketScape must meet the following inclusion criteria:

- **Global presence:** Companies must have a global presence, operating in at least Europe, North America and the Asia/Pacific regions with at least 25% of product customers/revenue in the United States.
- **Active customers:** Companies must have a minimum of 2,500 active global customers (corporate entities) using these applications.
- **Revenue of this offering:** Companies' revenue must exceed \$50 million in 2023, with at least \$25 million coming from the United States and be for the product evaluated in this research.
- **Market presence and momentum:** Companies' market presence and momentum are based on IDC inquiry and positive revenue growth.
- **Offering's abilities:**
 - Enable ad hoc, structured or unstructured asset or document-centric collaboration between groups or individuals and/or with external companies, through secure channels.
 - Create private 'rooms' or channels or the like, in which to collaborate and/or align workflow.
 - Enable interoperability with adjacent technologies via well-documented web services, open APIs and/or SDKs.

ADVICE FOR TECHNOLOGY BUYERS

The need for collaborative applications that 'just work', integrate easily with other products and create analytics that show the value of the collaborative product are what customers are seeking. They increasingly want to develop new metrics that accurately reflect their evolving business – and almost one in five companies are already creating

these digital-era metrics (see *IDC's Annual Collaboration Survey, 2024: Measuring the Collaborative Evolution — North America and Western Europe*, IDC #US51376624, August 2024). Enterprises need to more effectively connect their complete workforce, integrate core applications from across the enterprise and ground AI in visual, workflow and conversational collaboration. Key advice for technology buyers:

- **The collaborative stack is real and includes messaging, visual collaboration and synchronous and asynchronous collaboration and meetings, as well as work management.** Collaboration remains heavily influenced by company culture. A culture of sharing without personal risks paired with mentoring and collaborative behaviour modelling is highly effective at driving significant results.
- **AI is going to be everywhere.** Soon AI will be in the places you could not imagine.
- **The guidelines must be set.** Over one in four collaboration users (see *IDC's Annual Collaboration Survey, 2024: Measuring the Collaborative Evolution — North America and Western Europe*, IDC #US51376624, August 2024) list the most significant pain point of collaboration is when people answer questions in different channels. For example, getting a message in chat and responding in email – or elsewhere. Enterprises should set guidelines of what is best, and mentoring and modelling this behaviour should occur at the team level. Guidelines for channel/board naming conventions also help new users find the needed materials.
- **Every connected worker is now a knowledge worker.** This is true for frontline workers, remote workers and contractors, all of whom are being added to corporate collaboration. Companies are still evolving and expanding their collaborative stack to more types of workers to leverage the rich knowledge and data set of every team member. This better informs AI and results in wiser decisions at every level.
- **Get the collaborative products that make each line of business productive.** Ensure they will integrate with other apps in real time.
- **Multimodal communications and collaboration – a new norm that happens outside of work and fosters inclusiveness inside of work.** This ranges from hands-on engagement elements of a visual collaboration platform to the async messaging found in these same team collaborative applications. These modalities – different ways of communicating – are rapidly evolving.
- **Collaboration happens inside and outside your walls.** Collaboration is no longer limited to your teams, but to partners, suppliers and customers. Move to strategically increase the ability of customers and partners to be connected with your collaborative stack of applications, as needed.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Slack

Slack is positioned in the Leaders category in the 2024 IDC MarketScape for team collaboration applications vendor assessment.

Slack was founded in 2009 and acquired by Salesforce (NYSE: CRM) in July 2021. It is headquartered in San Francisco, California.

Every day in Slack, over 700 million messages are sent, and almost 3 million workflows run, 80% of which are built by business users without coding, across organisations of every type and size. Slack reports that 82 of the Fortune 100 use the product to collaborate with external organisations – which is often cited by customers as a key value proposition.

Slack offers collaboration, native project management, AI apps and agents in an AI-powered conversational experience layer. This connects data and organisations, streamlines and automates processes and accelerates business outcomes, regardless of which office suite you are using. With integrations to many critical enterprise systems and apps, Slack acts as an orchestration layer for work, saving teams and individuals time by aligning and adding visibility to work within the stream of conversations.

Users report that recent features have significantly empowered their collaboration, notably: Slack huddles (synchronous and asynchronous audio and video meetings), Salesforce channels for native integration with Salesforce records, AI-powered solutions templates for business processes and Lists for project management in the context of channels and conversations.

As part of Salesforce, Slack has a strong financial position, has a solid road map, enjoys high levels of engagement and has strong integration abilities.

- *Primary team collaboration use case order:* Team collaboration application, collaborative work management and visual collaboration (vendor provided)

Strengths

Slack has fans, some of whom had their careers accelerated by using Slack. Often referred to as 'how we pull all our work together', Slack has become mission-critical for

global and regional companies to streamline processes for cross-functional teams and accelerate work with external partners and customers.

Challenges

Communicating the Slack benefits against perceived notions of being just a messaging application remains one of Slack's more significant challenges. The strong Slack community is exceptionally robust and is a strong resource for admins and users alike.

Consider Slack when

Consider Slack when you need to bring all your applications together as a functionally rich, intelligent collaborative workspace that evolves with your business.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys and the input of IDC

experts in each market. IDC analysts base individual vendor scores and, ultimately, vendor positions on the IDC MarketScape on detailed surveys and interviews with the vendors, publicly available information and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behaviour and capability.

Market Definition

Team Collaboration Applications

Team collaboration applications (TCAs) provide a workspace and an integrated set of web-based tools for an ad hoc, unstructured, asset-centric or document-centric collaboration between groups or individuals between known domains. A TCA can be represented by secure 'channels' or 'rooms' that contain documents, chat history and transaction history to maintain a persistent auditable history or a more multipurpose shared workspace where users are able to store, access and share files. These applications may also provide asynchronous video collaboration. Administration is primarily performed by a known user (that governs access rules), but IT administration controls/management may also be possible. TCA solutions may also allow directory integration, policy management and integration with social collaboration tools (content shared within the social context of newsfeeds or groups) or with other business applications. Communication within the TCA environment is mostly asynchronous, business to business (B2B) and closed to a specific set of eyes, which may differ by team or channel.

LEARN MORE

Related Research

- *The Enterprise Collaboration Framework* (forthcoming)
- *Market Analysis Perspective: Worldwide Collaboration Applications, 2024* (IDC #US52550624, September 2024)
- *IDC's Annual Collaboration Survey, 2024: Measuring the Collaborative Evolution — North America and Western Europe* (IDC #US51376624, August 2024)
- *Worldwide Team Collaboration Applications Forecast, 2024–2028: Beyond Messaging to AI-Enhanced Multimodality* (IDC #US51377224, August 2024)
- *Cultural Accelerators That Power AI-Assisted Collaboration* (IDC #US51809124, March 2024)

Synopsis

This IDC study evaluates global team collaboration application vendors for 2024 and focuses on collaborative solutions, including messaging, collaborative work management and visual collaboration. It highlights the integration of AI in enhancing collaboration, addressing security and governance needs and the importance of integrations and interoperability. Noted are changes in the market, including more visual and multimodal solutions. The study assesses a variety of vendors, providing insights into their strengths, challenges and suitability for various collaboration needs.

‘Collaboration is more than words: The world is more visual, intelligent, interesting and engaging. This is how people communicate outside of work, and now at work using team collaboration applications,’ according to Wayne Kurtzman, IDC’s research VP of Social, Communities and Collaboration. ‘Companies are leveraging an intelligent collaborative stack of integrated applications to drive the next generation of productivity, creativity and ideation. Collaborative applications are key to reinventing your workforce and how customers and partners become your new collaborators.’

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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