Serious insights

The Collaboration Market 2020
Innovation and Momentum During Lockdown

Daniel W. Rasmus
Managing Director and Principal Analyst
Serious Insights LLC
September 2020

Table of Contents

This report can be found online at SeriousInsights.net.

Overview and Methodology

Collaboration vendors have touted the value of remote work for decades. It wasn't until the 2020 COVID pandemic that their ideas of distributed work were deeply tested. And for the most part, collaboration delivered on its promises. The adoption of concepts often unveils new fractures under stress. Collaboration technology proved no different. Video conferences, treading water for years as a secondary backup to physical meetings, jumped to the forefront for many organizations. Their security models, and their user experiences, required rapid remediation and innovation. Standalone tools, once sufficient as Microsoft Office feature alternatives, looked disjointed as people spent more hours using them.

So the enterprise collaboration market innovated faster than it ever has before. Many products migrated toward a more holistic user experience. Some doubled-down on integration with other apps and services—entering more ecosystems and entering them more gracefully.

Serious Insights conducted a survey in August and early September among the leading collaboration vendors. We also conducted research on other products through release notes and other content as sources. We found a market thriving during the pandemic, spurred on by work from home (WFH), learn from home (LFH), and the looming uncertainty of what work will look like in the next 6, 12, and 24 months—what will the experience of returning to offices look like, and what kind of next-level evaluation of features and services will it require?

This following report details the results of that research.

Serious Insights on Collaboration

Unlike some analyst firms, Serious Insights does not segment the collaboration market into different categories. We see collaboration as a continuum of activities, served by different features or services. We believe collaboration must be designed as an end-to-end experience. Fragmented experiences cause undue stress on workers who must decide on which app to use for what, and then switch to that app. They need to search for content, collaborate on content, share it, store it, and search for it again.

Our research for this report reinforces the holistic view of collaboration with feature integration taking place across the market. Standalone or complementary services found a way to offer workspaces, and the workspaces found new ways to bring in third-party services to enhance their value.

We will not pick winners or losers in this report—nor will we attempt to offer a comprehensive map of the market. We are sharing the market dynamics: how WFH and LFH shifted strategies, upended assumptions, and created new needs for infrastructure and functionality.

At its most basic level, the principals of technologically-enhanced collaboration remain stable. The research in the 1980s and 90s remains valid, though the names of products, their delivery, and their user experience diverge from earlier products. Like those earlier products, the mix of legacy and emergent models will collide as a result of the pandemic and its aftereffects. Those products faced the web first, then The Cloud. Today's products face privacy, scale, fluidity, and workflow challenges. Consumer technology informs workers that technology need not be difficult or burdensome to use—and with people now working from home, the consumerization of collaboration will drive the next market evolution.

While we cannot choose winners or losers today, there will be winners and losers. The collaboration market in 2021 and beyond will be a very different place than the one that started 2020. Future research will focus on the characteristics of the next market, as well as the attributes of those products and companies that will likely dominate the next phase of collaboration.
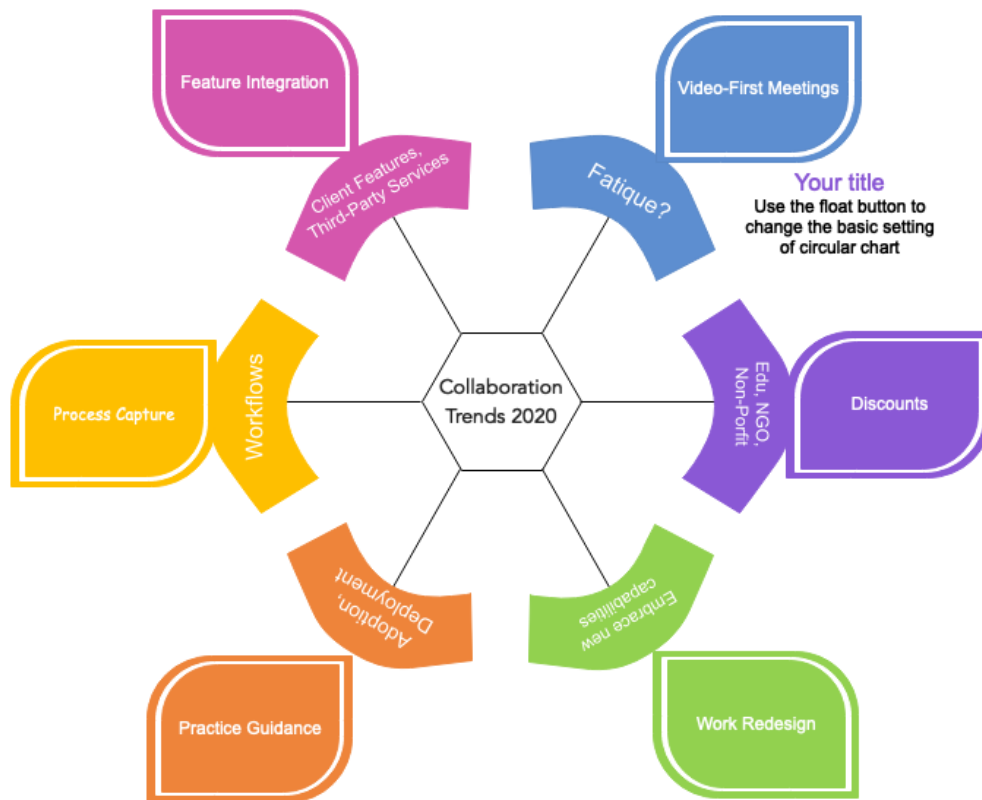
This report offers the following Key Findings in its first examination of the collaboration market and how it has reacted to the pandemic-driven work-from-home experience.

Key Findings

1. COVID-19 and the related WFH phenomenon greatly accelerated the evolution of collaboration technology.

2. Rapid updates to collaboration tools will likely extend into 2021 and beyond.

3. Most new features currently focus on security, ensuring scale, ease of use, feature integration, and leveraging enterprise infrastructure.

4. Video-first meetings have come to dominate the landscape, for now.

5. Feature integration is leading to integrated work experiences, either with frameworks driven by single vendors bringing their experiences together (Google, Microsoft), or previous standalone vendors leveraging their storage solutions as the bridge between environments with content and workflow as the connector (Dropbox, TheBrain).

6. Zoom demonstrates how a standalone video conferencing solution can dominate through a relatively organic and friction-free onboarding experience.

7. Collaboration customers are rapidly adopting workflow and process automation technology to support working from home scenarios.

8. Customers are craving guidance on how to get the most out of their investments, including rapid onboarding, and using advanced features.

9. Collaboration practices do not become obsolete just because they can be superseded. They must be superseded to gain benefits.

10. Many vendors are offering discounts for education, non-profits, and NGOs affected by COVID, or working to help solve problems related to the pandemic.

Analysis

Work from home transformed Zoom into an activity–from a proper noun to a verb. But Zoom's rapid rise to prominence was not without issues. Concerns over the lack of end-to-end encryption raised issues about others stealing personal or proprietary information from the Zoom stream. "Zoombombing," another Zoom-centric phenomenon, reinforced privacy concerns as hackers broke into meetings, often disrupting the meeting with sexual and other disconcerting images.

Zoom faced these technical realities while scaling up from 10 million daily users in December of 2019, to 200 million daily participants in March 2020. These concerns forced Zoom to not only increase their public relations efforts to explain and apologize for the product's shortcomings but to fix them by introducing enhanced encryption and improved password security. Zoom published a [lengthy response](#) to its user community on April 1, 2020, to respond to issues, share actions taken, and reveal future plans.

Unlike many companies watching the exploration of Zoom's letter explicitly stating they would be going into a feature hold while they repaired their operations and infrastructure problems, most have accelerated development.

Zoom's successes and failures often make it the focus of business stories, and the butt of jokes in popular culture, but while it licks its growth-inflicted wounds, dozens of collaboration vendors reexamined assumptions, rapidly developed new features, accelerated roadmaps, and increased customer and marketing communications. The collaboration market has not been so vibrant or top of mind for companies since the rise of groupware in the 1990s.

WFH created new opportunities to make the case for collaboration. It also exposed issues driven by complacency and incremental investment—and those caused by the rapid rise of cloud-based services which often mimic a few basic features, creating an oversaturated market with a few large players and a host of smaller companies with little differentiation.

COVID-fueled WFH results will rewrite the collaboration market playbook. It has already elevated collaboration technology to the strategic IT forefront, and it has spawned hundreds of podcasts, posts, and articles on how to more effectively work from home—often from those who have either worked from home during the previous working world order, or are learning with everyone else what works, and what doesn't.

Feature Use

Many workers, along with most learners, know all too well that realtime video has become the de facto mode of communication. Google saw 30x increase in *Meet* usage since January, clocking in at 3B+ minutes per day. Fuze recorded a 56% drop in desktop phone calls between 3/2 and 7/13/2020. Mobile calls, on the other hand, increased 339%, while web browser-based calls increased 755%. Full video meetings based on Fuze increased 261%, with the number of participants rising by 331%.

The most revealing insight from Fuze was the 596% increase in video use across calls and meetings. Companies once satisfied with individual and conference calls switched dramatically to video.

All of this video finds counterbalance with other features, like the Fuze *Quiet Hours* that updates status and mutes notifications for chats, calls, and ad-hoc meeting invitations. Fuze speculates that the increased use of this feature is demonstrating people taking control of their environment to avoid burnout, as well as their work-life balance.

Fuze reported that desk phone-related items, including extensions, star codes, and conference room features, are not as relevant to their clients in the current climate. Microsoft also reflected this by deprioritizing features like call merging and multiple number dialing.

Cisco reported a 3X growth in business use of Webex Meetings since February 2020. Leading features included a higher rate of video use within meetings, the acquisition of Webex video devices and Cisco headsets for home use, and growth in workflow integration. Webex Meetings picked up 10K+ new collaboration users.

Cisco also saw shifts to the cloud for contact center deployments, an expansion of on-premise contact centers, virtual agents, including chat BOTs and conversational interactive voice response (IVR), plus remote agent set-ups.

Slack also tracks returning teams to measure growth and progression among new adopters. They saw a 120% increase in Italy, a 34% increase in Japan, and a 33% increase in Korea by mid-March. They also saw triple-digit growth in the number of new workspaces. Global active use minutes during weekdays now exceeds 1 billion.

One of the key drivers for Slack customers was [Workflow Builder](#) that helps automate em-

An example Slack workflow for receiving feedback, even without a meeting.
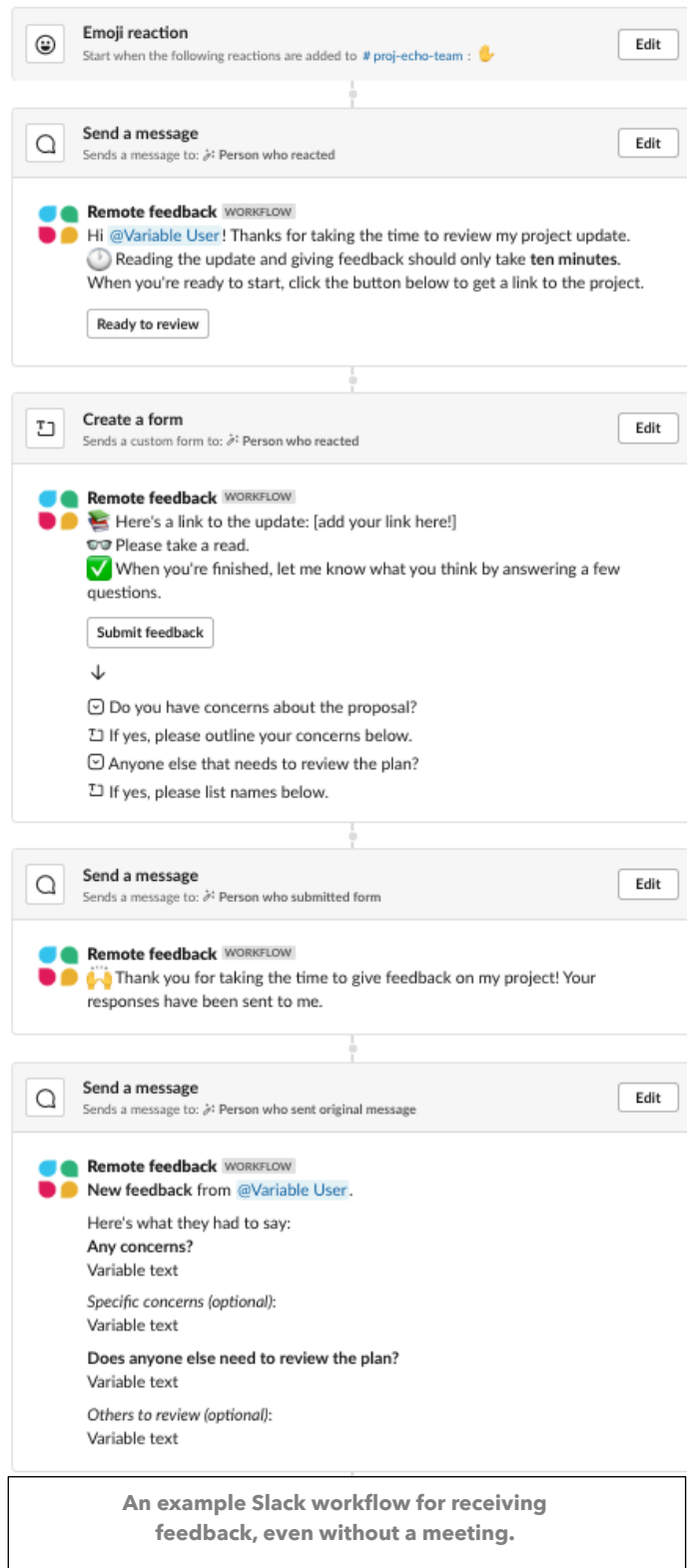
ployee onboarding. Nearly 10M workflows have run since the tools launched in January 2020. Along with those workflows, Slack also saw an uptick in company culture-related apps. Examples include Disco, which helps recognize when people live company values, and Donut, which facilitates co-worker communication through random coffee breaks, water cooler conversations, or virtual brown bag meetings.

TheBrain experienced double-digit growth as their product moved from single users to Teams. The company's internal brain for managing the HR interview cycle became even more crucial as hiring managers found themselves in multiple states and countries during the lockdown—at a time when they needed to hire more support staff to help the influx of new users, or those reaching for more advanced features, master the product. A brain-fueled process that often-included shortcuts taken due to physical proximity, with side conversations substituting for data, now required data and structure to orchestrate the process across geography and time zones.

Education drove the rapid adoption of MindMeister's mind mapping tool, as they saw a 100% increase in site visits and a 200% increase in signups during spring 2020.

New Features and Fixes

There has been a general recognition of the need for integrated spaces. Google, Cisco, Microsoft, and Dropbox have all migrated their user experiences toward one that is more integrated, offering a range of features within an application framework. Dropbox launched its smart workspace concept. The file synchronization tool now acts as a bridge between ecosystems, rather than being a plug-in to the ecosystems of others.

| Inbox for e-mail | Chat | Rooms | Meet |
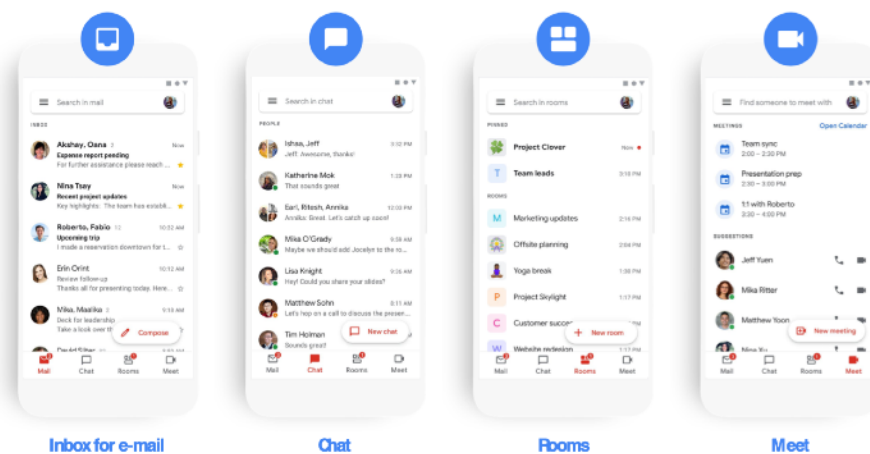
Google embraces cross-feature integration with the latest version of G-Suite.

Google embraced integration by putting Gmail on steroids. The e-mail interface now includes meetings, chat, voice, and video. And by bringing these once disparate apps together, users also receive universal search across their communications channels. Microsoft brought much of its Microsoft 365 offerings, including SharePoint, into Teams.

When previously standalone tools, like Dropbox, need to integrate, they partner, as they have with Zoom and Slack most recently, to bring their features into another product's framework without lessening their unique capabilities. Other examples include deeper Fuze and Webex connections in Microsoft Teams and in Slack.

AI is also making an appearance in collaboration, such as the meeting assistant in Webex meetings that can take action items on the fly, and the inclusion of Cortana even in the iOS version of Microsoft Teams.

The new Series One room kit for Google Meet, brings to market a new room audio system designed and built with hardware partner Lenovo. The system, specifically engineered around Google Meet, anticipates a return to shared spaces. A Google Edge TPU delivers enhanced audio and video clarity.

Beyond meetings, process support has increased. Dropbox's HelloSign saw a 25% increase in use in Q2 of 2020 over Q1. Dropbox integrated their shared repository model with desktop and mobile document signatures. While other products exist, such as those from Adobe and DocuSign, only Dropbox combines a common collaboration with legally binding signatures in the same workspace. HelloSign offers a good example of a company once considered a file storage solution recognizing the need to expand into collaborative workflows.

More specific workflows also came to the forefront. As telehealth use increased, Cisco, for instance, reported the acceleration of their remote health offerings, including EPIC integration with Webex.

In June, Slack announced Slack Connect, as a secure communications environment that allows its customers to bring external partner, client, vendor, and others into Slack conversations, replacing email with a more transparent and accountable experience.

As noted in the **Analysis** section, encryption and other security features were of primary concern.

While TheBrain did not release new features, they saw a significant increase in the use of the Teams products, with many once individual brains now being shared among teams. Researchers often use TheBrain to manage their content, discoveries, and ideas—pharmaceutical research on the virus often leverages TheBrain's extremely flexible environment for tracking progress and sharing context.


TheBrain did see the advent of a laptop button on the new ASUS The ROG Zephyrus G14 ACRNM laptop. A key on the custom keyboard that launches TheBrain. The laptop is aimed at creative business professionals and gamers.

Microsoft Teams on a Tear

It is not possible to determine how long some of the planned changes for Microsoft Teams were considered before implementation, nor which ones entered the roadmap because of COVID-19 and WFH, but the list includes a number of features that appear to be a direct response to the increasing use of Teams. These include:

- Teams meeting call and meeting chat size increased to 300
- NewTek NDI for Teams
- Updated Meeting join experience for uses who don't have a meeting creation policy
- Suggested replies in Teams mobile
- AutoClaim Policy for products containing Microsoft Teams
- Updated Teams Admin Center
- Support for native device camera and location for mobile apps
- Updated Teams usage reports
- Speaker attribution in Live Captions
- Organizer only Teams meeting lobby policy option
- Updated Meeting creation and expiration policies
- Resource-specific consent for Microsoft Teams
- Improved device tagging and tracking in Teams admin center
- Multiple account support on Mobile apps
- Auto-translation by default
- Simplified notifications

- New pre-meeting joint experience
- Live transcription
- New audio and video policies
- Incoming video support on Safari 13 and later
- Spotlight an individual video participant for all attendees in a Teams meeting
- Enterprise Content Delivery Network (CDN), Riverbed, for those who need a CDN for live events
- Teams customer meeting images
- Floating controls
- Team meeting participant report updates
- Cortana voice assistance in Teams mobile
- New file sharing experience
- Meetings and calls in separate windows
- New Information pane and pinned posts
- Large gallery view
- Native notifications in MacOS and Windows

(Note: This list reflects features up to September 14, 2020. It has been edited by Serious Insights to reflect those features we identified as relevant to WFH.)
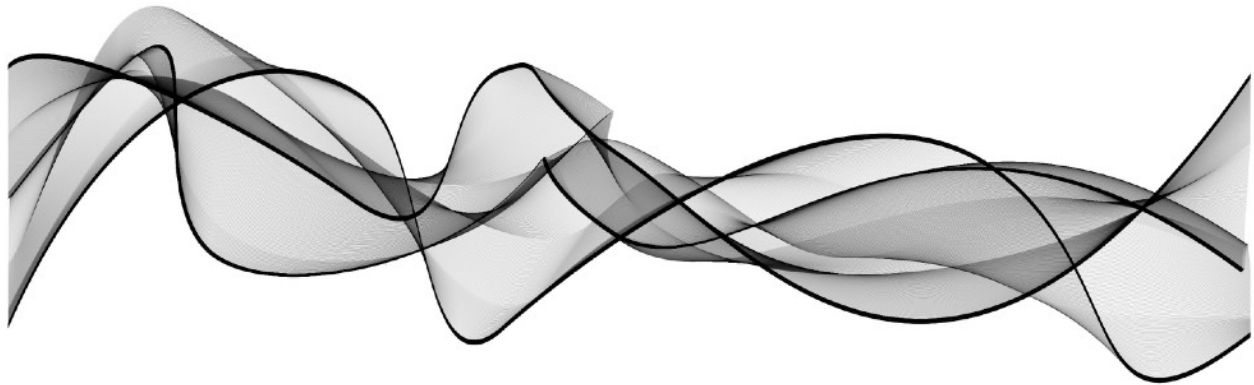
Beyond the direct user experience, compute capacity will prove a key factor in offering sustainable services as demand ramps up. While Fuze was already an enterprise-scaled, global product, their teams actively monitored for usage spikes and instability. They "drastically increased the computer resources across the platform," and looked for ways to optimize the platform and its configuration to be manager demand.

Roadmap Acceleration

The new features and fixes reflect a general acceleration of roadmaps across the market. This will likely prove a selective pressure as those who can invest in new features will better adapt to emergent demands. Technology firms holding to existing roadmaps will look increasingly disconnected from the innovations being delivered by the market leaders.

The Microsoft Teams release notes page offers a view into acceleration as SARS-CoV-2 turned COVID-19 into an existential disruption of assumptions about the future of work.

ServiceNow explicitly increased their release cycle frequency: "Given the changing and dynamic nature of the COVID-19 epidemic, we are planning releases twice a month to support customers' changing needs." (More [here.](#))

The rise of enterprise use at TheBrain found the product in need of deeper ties to enterprise infrastructure. Features under development at TheBrain include:

Granular Level Access Control. To enable more flexibility for teams, we are prioritizing more granular access control which will allow each node in a brain to be individually addressed for access control purposes, so that they can be made invisible to groups they are not applicable, in addition to giving varying levels of control over their content.

Active Directory Integration. The TeamBrain server product allows enterprise customers to deploy dedicated internal servers that support our synchronized knowledge bases enabling collaboration even while offline. This is a major advantage for teams where members may not consistently have reliable network connectivity but still require 100% uptime with regard to knowledge access. We have recently completed our Active Directory integration which allows enterprises to manage brain access groups and users via their existing Microsoft Active Directory installation, streamlining support, and deployment to large groups of users.

Supplemental Attachment Encryption. TheBrain already encrypts information during network transfer and while it is at rest in the cloud. However, some information requires an additional level of security. This will soon be integrated into TheBrain in the form of 256-bit AES encryption unlocked on a file-by-file basis with individual passwords for each file. Files encrypted in this manner remain completely inaccessible without the right password. For data like sensitive financial information or passwords, this encryption model prevents access even if someone gains physical access to an unlocked computer over an extended period.

Serious Insights does not expect roadmap acceleration to slow in 2021, as uncertainty and emergent needs will continue into the new year and beyond. Leisurely, thoughtfully planned releases centered around date-driven launch events will likely be a thing of the past, for the foreseeable future, if not forever. As new requirements surface, vendors will be challenged to address those needs quickly or lose mindshare to another vendor who beats them to market.

WFH has not only forced collaboration into the forefront of business, but it has also forced collaboration developers to confront some of their most fundamental ideas of what people will accept, and what they expect from remote work experiences, and rapidly build new features and refine others. It isn't so much that the general future of work visions have changed, but that the acceleration towards those visions brought with it visibility into details that usually elude thought leadership generalizations.

It isn't so much that the general future of work visions have changed, but that the acceleration towards those visions brought with it visibility into details that usually elude thought leadership generalizations.

MindMeister did not change their roadmap, but like many collaboration vendors, they focused on reliability and performance to support the increased use of their products.

For companies where collaboration is not the primary product, such as Salesforce and Cisco, there may be a plateau of parity at some point in the future where continued investment in collaboration features may slow in comparison to the core business. With increased revenues from collaboration portfolios, strong customer engagement, and uncertainty around the future of the work experience, collaboration technology will likely continue to fuel innovation as it adapts to new realities.

Adoption and Deployment

Adoption begins with product evaluation. All of the collaboration companies surveyed saw an increase in trial use or upticks in downloading of free products. Dropbox, for instance, experienced a 20% update in trials of their business product.

ServiceNow dropped several Safe Workplace apps to address the need to rapidly respond to WFH as well as worker safety on returning to physical workspaces. One of their apps offers contact tracing and employee health screening.

The ServiceNow contact tracking app helps identify potentially exposed employees based on workplace data. The app then executes follow-up activities, including interviews, check-ins, location sanitizing, and case closure. The app aids in the assessment of the risk of staying open by analyzing exposure trends and making them visible and accessible via the safe workplace dashboard.

In order to identify employees that may have been in contact with infected individuals, the app leverages a number of data sources such as employees at the same location, attendees in the same meeting room from Office 365, employee self-report logs, and badge scans. Customers can configure the information collected, used, and disclosed through the Contact Tracing app to ensure their use of the apps is in line with data protection laws and regulations that apply to them.

ServiceNow reported in June that 1,600 Safe Workplace apps were implemented by nearly 400 customers (more here: https://blogs.servicenow.com/2020/contact-tracing-app-workplace.html).

Slack studied their own reaction to work from home. They published a blog titled, Adapting the way we work when offices need to close, which outlined the following practices:

1. Create an announcements channel

2. Use customer statuses

3. Move meetings to channel

4. Don't forget about direct messages

5. Sketch your ideas and upload them to Slack

6. Communicate face-to-face, wherever you are able

7. Share channels with vendors, partners, and customers

8. Say it with emojis

Fuze rolled-out their adoption playbook, (see the Serious Insights analysis here), along with a WFH version of the process.

Serious Insights has published a comprehensive vendor-neutral guide to working from home (found here) to offer guidance to our clients and subscribers seeking to overcome obstacles and leverage opportunities as they manage personal or organizational work from home experiences.

Shifts in Support

Most developers did not report a change in support calls, but those that did suggest there may be a more widespread shift than reported.

Fuze saw an uptick in self-help content requests from their FAQs as increased page views on the Fuze Help Center/Fuze Community. Technical issues remain steady against pre-COVID metrics.

Slack proactively created a series of [free webinars](), and they are also offering [one-to-one calls]() for those looking for more personalized help with Slack.

TheBrain's support team responded to higher demand for more sophisticated use of the product's semantic features, primarily tags. They also reported more conversations about taking their knowledge on the road through mobile client synchronization, as well as cloud synchronization to support Teams transitioning personal brains to shared knowledge bases.

It may be that other vendors did not yet see higher-order calls because the adoption cycle remains relatively new, and people are still struggling through traditional start-up issues. All collaboration vendors need to prepare for more sophisticated call center interactions as existing customers dig deeper, and new customers test the limits of introductory curricula.

Vendors should closely monitor shifts in support as a leading indicator for the evolution of not just product use scenarios, but also customer expectations. We suggest that all vendors conduct internal workshops to look at next-generation use cases for their products, and with those, what features and infrastructure will be required to support those scenarios—and bring customers into that conversation. Getting ahead of the customer needs to inspire internal innovation, which will also provide for a shorter product runway because many ideas will already be in research ahead of putting them into the roadmap.

Promotional Pricing

Several companies created promotional pricing, or now offer once paid features for free.

Examples of free collaboration tools available as a result of COVID-19 and WFH:

- ■ Atlassian, free for small teams (up to 10)
- ■ Asana, free access to their Basic level (up to 15 people)
- ■ Microsoft Teams, free tier

- Google Meet, free to all
- Zoom, free 40-minutes
- Dropbox with HelloSign, free to NGO-based COVID response teams
- Cisco, virtual event discounts
- TheBrain, 35% discount for non-profits, education, NGOs
- MindMeister, six months free to educational institutions

Serious Insights suggests that those companies offering free extended trials need to rethink those programs. They either need to extend deadlines or offer more transparency about the duration and end dates. Uncertainty about cash flow will rise high on the list of concerns at vendors, but the organizations doing good work with impacted individuals and communities need certainty about the solutions they have come to rely on. They need to know they can continue working without worrying about paying for the technology that connects them to each other, their partners, and their community. Cisco, for instance, says their Webex Contact Center Quick Deployment Solution will continue until further notice, with a notification sent when the "solution goes through end of life." That statement needs more clarification.

All free or discounted programs need clear parameters so technology adopters can plan. Although the vendors are themselves dealing with uncertainty and may not be prepared to state when a program will end, they should pick end dates if they plan one—or explicitly say if they do not plan to discontinue the program. It is easy to extend end dates should conditions remain dire. Ride goers at Disneyland express joy when their 45-minute wait time only runs 20 minutes. Free or reduced-price offers that end-of-life "at some point" will never create the opportunity for injecting joy, either by keeping to a commitment (i.e., ending the program when it says it will end), or extending the program, thus saving cash for non-profits or small business as the crisis continues.

Free offers appear a nice gesture but may lock organizations into their test solutions, likely forcing them to invest in technology without a proper evaluation of alternatives. With COVID-19 changes expected to persist in 2021 and beyond, collaboration technology vendors need to think about longer-term programs that offer limited quantities of licenses to smaller not-for-profits at no charge, much as Microsoft does with its philanthropy program.

Techsoup.org offers a way to provide discounts without the administrative overhead of verifying and managing not-for-profit qualifications directly. Many collaboration vendors already participate in their programs.

Marketing and Communications

Focus on solutions to COVID-19 and WFH represent the majority of communications changes, with most companies offering COVID insights to help workers and employers better leverage their tool investment.

General communications also increased as new features arrived rapidly, requiring marketing to include awareness and guidance in support of the new releases.

TheBrain actively engaged the community by creating a public brain (see The COVID Brain here) to at first provide advice on how to flatten the curve. As the pandemic continued, they saw early areas of use on prevention give way to sharing about acceptance and learning to live in the new normal.
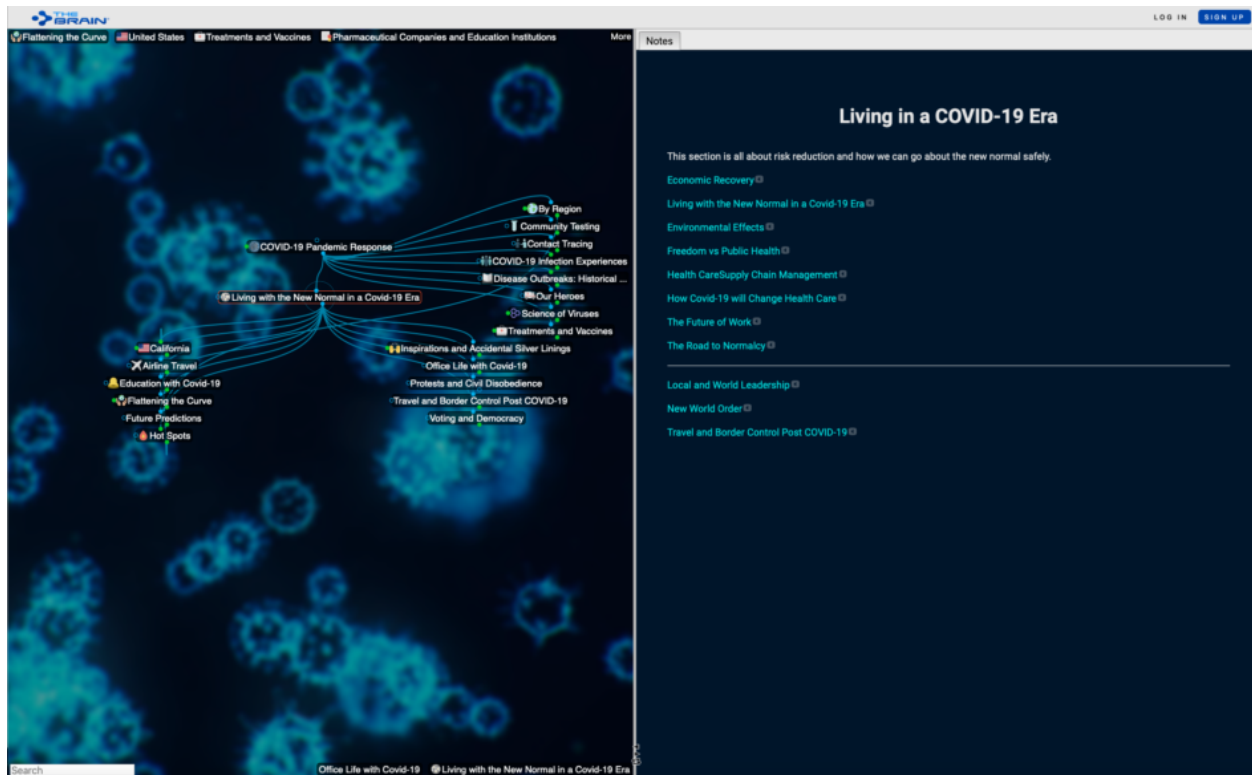
TheBrain's COVID plex.

Other examples of COVID response destinations can be found by clicking on the following links:

- [Dropbox](#)
- [Cisco Webex](#)
- [Fuze](#)
- [Service Now](#)
- [Microsoft](#)
- Smartsheet ([1](#), [2](#))
- [Salesforce](#)
- [Atlassian](#)

Looking Slightly Ahead

All of the companies participating in the survey reported readiness for the return to work in offices—however spotty that movement may be. Cisco offered the following list of observations about the NEXT normal, assuming it will be post-COVID:

- Secure collaboration is a CEO priority
- You can work from wherever you are
- Video-first meetings is now the standard for business
- Unified communications is more than just meetings
- Traditional offices will evolve
- Transition to cloud will accelerate
- Infrastructure and last-mile matter

Serious Insights has perspectives on each of those topics. Here are our responses:

Secure collaboration is a CEO priority

Distributed work forced executives to recognize the value of collaboration tools once relegated to the general infrastructure line under Productivity Tools at the cost-center that is IT. IT is now much more likely a transformation enabler than a cost center, and "productivity tools" now classify as essential investments that keep organizations running. Serious Insights pointed out in "[Why Collaboration is Broken](#)," that many organizations procure too many tools, often with overlapping features. With the rise of col-

laboration to the level of executive awareness, security should not be the only concern. CEOs and other accountable executives need to also prioritize the rationalization of their collaboration technology investments like they would any other strategic investment.

You can work from wherever you are

This is not universally true. Many frontline workers, those who have become known as essential workers, cannot work from wherever they are. But those on the frontline require up-to-date information. They too will require access to collaboration tools. Vendors and the organizations deploying collaboration tools need to understand the complex needs of knowledge workers who work in face-to-face or body-to-infrastructure roles. This includes retail workers, warehouse workers, healthcare workers, drivers, and many other professions where isolation isn't an option, and where the use of collaboration tools, even just reading e-mail or company bulletins, may be severely constrained by the demands of the work.

Those who do have the luxury to work from anywhere will require different features, with divergent adoption and support practices, from those who must work from a specific location.

Video-first meetings is now the standard for business

This may be true, but Serious Insights believes this assertion will fade over time as face-to-face fatigue sets in, and improved processes eliminate the uneasiness of distributed work and the trust it requires. This report outlines recent vendor innovations in workflow management, and more of those are likely. As people can see the work that needs to be done, have that work self-report progress, and for analytics to increasingly offer visibility into the most minute of work tasks, the need for video-first will become more focused on morale and problem resolution. Problem resolution may find a combination of chat with a voice clarification more effective than convening a video meeting. Video-first also places a burden on appearance and spoken presentation, which may not be the way some team members excel. Offering a variety of ways to communicate effectively will be important going forward.

Unified communications is more than just meetings

As noted above, chat, comments on documents, and other forms of collaboration will likely prove just as valuable as phone calls and video. The smartphone offers an analogy, as many now eschew voice in favor of video calls, and posts as a way of communally sharing knowledge. Those practices will continue to infuse into the work envi-

ronment, likely becoming the primary means of collaboration over time as many Slack users already experience.

Traditional offices will evolve

This is a rather vague statement, as the future of work will be significantly defined by how people work in offices in the future. How offices evolve depends on several factors, including immunity, the willingness of the workforce to work in offices, the recognition of the value of zero commute, the adoption of remote work performance approaches, and many other items. Serious Insights will stay at the forefront of learning and sharing as people return to the office, or not.

Transition to cloud will accelerate

We agree with this assertion. That said, the cloud transition was already nearly complete, despite adoption lagging capability. Most collaboration products, even the most traditional of those products, like Microsoft Office, now offer cloud-first implementations. Microsoft's rebranding of Office and Microsoft 365 reflects that reality.

Infrastructure and last-mile matter

This is absolutely true. Those with good access to wired and wireless technology participate in collaboration much more effectively.

Exploring the Future of Work

Several companies, among them Cisco, Slack, and Microsoft, have renewed investment in the future of work-related thought

leadership. Much of this work reflects surveys about how people think the future will play out, or gleanings from product statistics.

Examples of Future of Work research can be found here:

- [Cisco](#)
- [Salesforce/Deloitte](#)
- [Slack](#) and [Future Forum](#)
- [Microsoft](#)
- [Google](#)

Organizations should be thinking much more broadly about the future of work with scenarios that examine future implications of social, technological, economic, environmental, and political shifts. Undertaking scenarios, while it needs to start now, will likely miss significant narrative opportunities until after the 2020 election, and perhaps into the transition of power, if one takes place, in the United States. Salesforce undertook a set of scenarios very early in the COVID-19 shutdown. Those scenarios proved premature, as social upheaval following George Floyd's death and rise of Black Lives Matter created social conditions not anticipated in that work. In the meantime, collaboration vendors should seek to understand the uncertainties in play and prepare for exploring future narratives and implications of different values for the uncertainties early in 2021.

Scenario work always runs the risk of large events disrupting the speculative narratives. Ongoing uncertainty at the current magnitude requires longer development timeframes and the ability to remain flexible, in order to incorporate new uncertainties, and new certainties, as they appear.

More so than ever, scenario planning needs to be not an activity, but a process that organizations invest in over the long-term for thought leadership and for strategic insight. Good scenarios inform product decisions, business strategy, customer experience, and organizational design in ways traditional linear planning cannot.

The Collaboration Market 2020: What the industry is missing

Ingrained work patterns may appear to change with the adoption of new technology, but they really haven't. As Fuze observed, "people are still defaulting to the old ways of working. For example, workers who typically had side conversations in the office are using ad-hoc video calls escalated from chat or putting meetings on the calendar. To really address the long-term issues related to burnout, as a market, we need to help facilitate a change to behavior, and help people balance work and personal obligations to maintain employee health and productivity."

The industry is missing guidance and practices on how to rethink work in light of new capabilities. People need to receive a vision from vendors that allows them to see through the lens of what is possible with new technology, not just how using new technology saves time while supporting, even reinforcing old practices.

Practices do not become obsolete just because they can be superseded. They must be superseded to gain benefits. Meetings that don't leverage access to repositories and realtime collaborative editing fall back upon the talk about it, note it, do it later practice. With realtime collaboration on content, meetings can end with much of the work accomplished, transforming them from communications forums to productive sessions with real outcomes that people can put in their quiver of positive reinforcement.

Vendors not only need to share visions, but to share examples of how they are using their own technology, and that of their partners, to do their work better. Customers should challenge vendors to demonstrate the power of their tools on support calls, through contract negotiations, and during the inevitable renewal sales call.

On Social Justice

Social justice did not come up as an influence on collaboration technology. But social justice is a key lens for the examination of machine learning and AI. As those technologies continue to converge on the collaboration market, vendors must pay diligent attention to bias in how they choose what to share as important, and the recommendations their tools make. Microsoft recently started using AI to suggest formats for PowerPoint slides. As innocuous as that may sound, if people do not see themselves reflected in the suggestions, then they may not use the feature, even if they do not experience offense or discomfort.

Collaboration requires the recognition of equality and inclusion among team members. E-mail makes it very easy to lock people out of conversations, conversations they don't even know are taking place. Although more modern collaboration tools can still include hidden channels and non-inclusive teams, creating division requires more intentional acts than simply not including people in an e-mail thread, though it can still happen. Functional teams and goal-driven efforts, however, create a more organic scaffold, one that encourages transparency and inclusion. But it is important to remain vigilant against both intentional and nonintentional exclusion and create mechanisms for rapidly repairing rifts.

Modern collaboration, especially asynchronous tools, cannot guarantee a more just, inclusive, and fair work environment, but they do offer a higher likelihood that people

will be recognized for their knowledge, skill, and problem-solving abilities without race, religious belief, economic history, education, or other personal attributes playing a role. Organizations should also, however, strive to listen to different perspectives and be willing to learn from those perspectives. That is, after all, the heart of collaboration.

Recommendations

- Look beyond the immediacy of taking routine work remote. Seek to improve work through redesign that includes new tools and capabilities unleashed and embraced during the WFH phenomenon.

- Don't let the increased adoption of process automation for employees and customers substitute for meaningful interpersonal engagement.

- Other video conferencing companies may well still challenge Zoom, but they will need to adopt a more consumer-oriented business model with low to free entry-level pricing. They also need to consider migration to a more open purchasing model in general as enterprise sales will likely not be their best path to capture on-demand market share.

- Organizations should be thinking much more broadly about the future of work with scenarios that examine future implications of social, technological, economic, environmental, and political shifts. In the meantime, collaboration vendors should seek to understand the uncertainties in play and prepare for exploring future narratives and implications of different values for the uncertainties early in 2021.

- Customers should challenge vendors to demonstrate the power of their tools on support calls, through contract negotiations, and during the inevitable renewal sales call.

- All collaboration vendors need to prepare for more sophisticated call center interactions as existing customers dig deeper, and new customers test the limits of introductory curricula.

- Vendors should closely monitor shifts in support as a leading indicator for the evolution of not just product use scenarios, but also customer expectations.

- Write transparent policies on donations that clearly state end dates, set out the potential for flexibility, and reveal future pricing plans once the promotional period ends.

■ Collaboration vendors need to work with their customers to not just use collaboration effectively, but to use it justly. Organizations should strive to listen to different perspectives and be willing to learn from those perspectives.

■ Vendors must pay diligent attention to bias in how they choose what to share as important, and the recommendations their tools make.

■ Rationalize collaboration technology portfolios to avoid overlap and ensure a full feature set.

The Serious Insights Collaboration Features Model
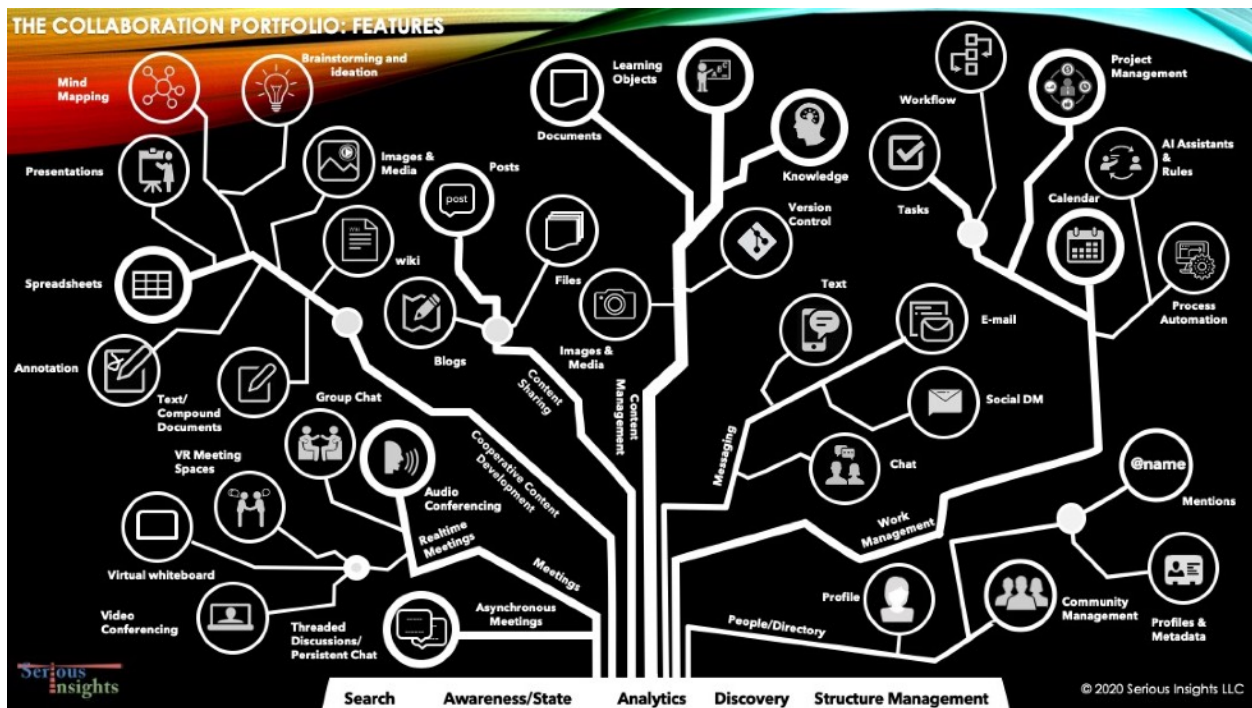
Collaboration Market 2020: About this research

This research was conducted in July, August, and September of 2020. The participants in this research were Cisco, Dropbox, Fuze, Google, Microsoft, MindMeister, ServiceNow, Slack, and TheBrain.

About the Author

Daniel W. Rasmus, is the Founder and Principal Analyst at Serious Insights, a boutique analyst firm focused on collaboration, knowledge management, and the future of work. Rasmus uses scenarios to analyze uncertainties in society, technology, economics and politics in order to discover implications that help organizations better navigate the future, and more effectively develop and refine products, services and experiences.

Rasmus is the author of *Listening to the Future*, which explores his scenario work at Microsoft. His latest book, *Management by Design*, documents an innovative new methodology for work experience design.

Rasmus's thoughts about the future of work have appeared recently in *The African Business Review*, *Chief Learning Officer Magazine*, *Talent Management*, *KMWorld* and on *HBR*'s blog.

Rasmus is the former Director of Business Insights at Microsoft, where he helped the company envision how people will work in the future. Before joining Microsoft, Rasmus was a Vice President and Research Director at Forrester Research.

Rasmus is an internationally recognized speaker. He has addressed audiences at Enterprise 2.0, CeBIT, UBTech, ProjectWorld, KMWorld, SAE International and Future Trends. He was a delegate to China's World Cultural Forum in 2012. Rasmus writes regularly about the future of technology and culture at Fast Company, iPhone Life and PopMatters.

Rasmus, a former Visiting Liberal Arts Fellow at Bellevue College continues to teach social media at the college. He was a member of the Pinchot University faculty academy in Seattle, WA where he taught influence and strategy. He attended the University of California at Santa Cruz and received a certificate in intelligent systems engineering from the University of California at Irvine.

Daniel W. Rasmus
Analyst

This research was developed independently by

Serious Insights LLC
Sammamish, WA
SeriousInsights.net

Serious Insights LLC is a Hivemind Network Affiliate