# Global Survey: Is enterprise social collaboration living up to its promise?

**May 2013 | Avanade**

avanade®
Results Realized

Across the board, IT and business decision-makers, along with end users, report positive outcomes from their use of social collaboration technologies in the enterprise.

## Executive Summary

We work in a constantly changing, ever mobile work environment, which embraces new technologies, policies, stakeholders and physical work spaces. This new way of working demands a more collaborative approach to business. Companies are redesigning long-standing processes to adapt to this shift.

It's clear that social technologies play a key role in facilitating collaboration. To better understand the scope and nature of the changes in the market, Avanade conducted a global research study in April 2013, interviewing 1,000 business and IT leaders and 4,000 employees about the impact of social technologies on enterprise collaboration.

Overall, research results showed a large, as-yet-unmet opportunity to fully adopt and leverage social technologies for collaboration at work. Currently the majority of IT decision-makers (87%), business leaders (67%) and end users (68%) report using enterprise social networking technologies, but most lack true enterprise collaboration capabilities.

Interestingly, decision-makers reported a measurable desire to move – in the next 12 months – from more consumer-driven technologies (e.g. Facebook and Twitter) to enterprise-ready collaboration tools such as Microsoft SharePoint and Salesforce Chatter.

Key findings revealed by the research study include:

- **Social collaboration is on the corporate agenda and the rate of new technology adoption is on the rise. [**Skip to section**]**
- **Business and IT decision-makers have a false sense of accomplishment when it comes to social collaboration. [**Skip to section**]**
- **Companies have a polarized view of social collaboration. Alongside a majority of eager adopters, a healthy minority of business leaders is skeptical about the real value of social collaboration tools. [**Skip to section**]**
- **There is significant opportunity in this emerging market. More businesses plan to adopt social tools for enterprise collaboration in the next 12 months. [**Skip to section**]**

In a separate "Work Redesigned" survey conducted in January 2013, Avanade found that companies are 73 percent more likely to report improved sales and new customer acquisition through the use of their collaboration tools than other companies. And, the consumerization of IT has raised the expectation of employees about which social technologies they can use to connect and collaborate both inside and outside of the organization.

Business and IT leaders are deeply interested in how social collaboration technologies can encourage better collaboration in the workplace, but what is the reality today? How are global businesses embracing new social collaboration tools? What impact are these tools having on traditional business processes? What results are companies seeing?

The following report offers a full look at findings from the most recent survey, as well as supporting data and Avanade's point of view on the results.

## Social collaboration is on the corporate agenda

- **77 percent of business and IT leaders say their companies are currently using social collaboration technologies.**
- **82 percent of businesses currently using social collaboration tools want to use more of them in the future.**

Avanade's most recent large-scale survey on social collaboration in the enterprise reveals that the overall rate of new technology adoption at companies is increasing, and the consumerization of IT plays a huge role in driving perceptions about social collaboration.

An overwhelming majority of business and IT decision-makers (96 percent) report the rate of new technology adoption at their companies is increasing or staying the same. In fact, only four percent report a decrease in the rate of adoption. And the vast majority of IT decision-makers (87 percent), business leaders (67 percent) and end users (68 percent) report using enterprise social networking technologies successfully at work.

Avanade defines enterprise social collaboration as processes and tools that can power today's mobile, dispersed and networked way of getting work done. It makes it easier for employees to stay connected, work better in teams, speed the flow of information and get more work done. This survey evaluated attitudes and adoption of social networking and collaboration technologies as a key enabler of social collaboration.

## Business leaders have a false sense of accomplishment in social collaboration

- **Those who have adopted social networking technologies reported using Facebook (74 percent) for collaboration at twice the rate of Microsoft SharePoint (39 percent), four times that of IBM Open Connections (17 percent), and six times that of Salesforce Chatter (12 percent).**

- **The most widely used social technology for collaboration after Facebook? Twitter (51 percent).**
- **Consumer-driven social technologies including Facebook and Twitter lack enterprise collaboration capabilities such as document storage, the ability to share best practices across teams; sharing and group editing; deep search of knowledge and experience within an enterprise; and integration with enterprise communications systems.**

Clearly a large majority of both decision-makers and end users believe they are using social technologies to enable enterprise social collaboration. But are they really? When asked which platforms are being used for collaborative purposes, the respondents revealed that they are adopting popular social networks such as Facebook and Twitter, and

3

hoping they enable social collaboration among employees. In fact, the only social platforms being used by more than half of the respondents were Facebook and Twitter. Decision-makers in particular appear to have a false sense of accomplishment when it comes to social collaboration. Those who have deployed social networking technologies reported using Facebook (74 percent) for collaboration at nearly twice the rate of Microsoft SharePoint (39 percent), four times that of IBM Open Connections (17 percent), and six times that of Salesforce Chatter (12 percent).

The truth is that there is a stark difference between consumer social networks and what's needed for enterprise social collaboration. Business and IT decision-makers believe they are enabling collaboration with social technologies, but the social technologies they report using most fall short in important areas needed for a business to effectively collaborate.

## Eager adopters and social skeptics offer polarizing views of social collaboration

- **Eager adopters are leveraging social technologies at work – approximately eight in 10 decision-makers (77 percent) and seven in 10 end users (68 percent) report using enterprise social networking technologies.**
- **The social skeptics fall on the other end of the spectrum – one in five business and IT decision-makers (23 percent) have not adopted social collaboration tools in the enterprise. And of those decision-makers who have adopted, one-quarter (24 percent) believe their social collaboration tools waste time or distract employees from their core jobs.**

# The truth is that there is a stark difference between consumer social networks and what's needed for enterprise social collaboration.

With all the positive perceptions about popular social networking technologies in the workplace, Avanade's research yields polarized views among business leaders (500), IT decision-makers (500) and end users (4,000) about the technologies. On one side is a majority of eager adopters and on the other is a healthy minority of holdouts – the "social skeptics."

Eager adopters are happily diving into social technologies at work – as discussed in the section above, approximately eight in 10 decision-makers (77 percent) and seven in 10 end users (68 percent) report using enterprise social networking technologies. That's a clear majority (70 percent) of the overall base of respondents reporting use of a relatively new technology in the workplace.

On the other side is the camp of social skeptics: one in five business and IT decision-makers (23 percent) has not adopted social collaboration tools in the enterprise. And of those decision-makers who have adopted, one-quarter (24 percent) believe their social collaboration tools waste time or distract employees from their core jobs.

While time-savings and productivity are among top benefits of these tools reported by users, the top benefit across decision-makers and employees is much softer: more enjoyable jobs.

So whose view is most valid? Those who embrace social networking as an automatic enabler of enterprise collaboration, or those who ignore and reject the same social tools as time-wasters? Data shows the business benefits outweigh challenges.

Across the board, IT and business decision-makers, along with end users, report positive outcomes from their use of social collaboration technologies in the enterprise. These benefits come down to speed, productivity and happiness, but the ranking changes depending on who you ask.

Of IT leaders, business leaders and employees, IT leaders report the greatest benefits from the use of social technologies. The 500 IT decision-makers surveyed claim the leading impact of these social technologies is to make employees' jobs more enjoyable (66 percent). Closely following that benefit, they report employees are more productive (62 percent) and able to get work done faster (57 percent).

While the top benefit reported by these decision-makers is the overall happiness of employees, what's interesting is that end users rank speed (55 percent) and productivity (54 percent) ahead of happiness (51 percent). IT leaders assign happiness to employees at a higher rate than employees themselves are reporting.

Beyond speed, productivity and happiness, IT and business decision-makers say the use of enterprise collaboration tools allow their employees to generate ideas collaboratively

4

(47 percent), more easily collaborate with their external customers, partners and vendors (47 percent) and provide more employee engagement (41 percent).

With improvements in speed, productivity and happiness reported by a majority of respondents using social technologies, enterprise social collaboration appears to be making good on its promise.

## Significant opportunity in this emerging market

- **In the next 12 months, businesses plan to shift from using consumer-driven social tools (e.g. Facebook, Twitter) to enterprise social collaboration tools (e.g. Microsoft SharePoint, Salesforce Chatter).**

Forrester estimates the market for traditional enterprise collaboration solutions at $42 billion in 2012. New social technologies and cloud delivery models are helping the overall market grow modestly (Forrester estimates eight percent CAGR through 2018). Social collaboration brings clear benefits, and enterprise social collaboration tools are reaching a tipping point in adoption. In the next 12 months, more businesses plan to adopt enterprise social collaboration tools such as Microsoft SharePoint or Salesforce Chatter than popular social networks such as Facebook or Twitter. This is the opposite of today's adoption rates, where use of popular social networking technologies far outranks enterprise social collaboration tools.

Today, consumer technologies top the list of collaboration tools used by enterprises that have adopted social networking technologies, while purpose-built enterprise collaboration technologies round out the bottom.

Respondents ranked the adoption of these technologies in the following order:

- Facebook (74 percent)
- Twitter (51 percent)
- LinkedIn (45 percent)
- Microsoft SharePoint (39 percent)
- IBM Open Connections (17 percent)
- Salesforce Chatter (12 percent)
- Yammer (11 percent)
- Jive (7 percent)

However, in the next 12 months, decision-makers across business and IT would prefer the reverse. Those who have already adopted social networking technologies, and want to use more, plan to adopt these platforms most: Microsoft SharePoint (23 percent) and Salesforce Chatter (23 percent). By contrast, Facebook (8 percent) falls to the bottom of this look-ahead list. While Facebook tops the list of social collaboration tools used today, decision-makers report concrete plans to invest in technologies specifically designed for enterprise collaboration in the next 12 months.

While the benefits of social collaboration tools are many, challenges remain. Even though the majority of businesses report

Successful collaboration strategies focus on people, not just technology.

that they have adopted social collaboration tools, a meaningful number of respondents face barriers to implementation. More than one-quarter (26 percent) of decision-makers say there is a lack of training to explain how to use such tools, and the same percentage (26 percent) report a lack of IT department resources to implement them. And that's with the vast majority of IT leaders (77 percent) reporting increased or the same IT budgets in the last 12 months.

Unsurprisingly, the "social skeptics" we described earlier cite the highest barriers to adoption. Of those who have yet to adopt social networking technologies, the majority (61 percent) believe these tools would not help their company, and more than half of this group (51 percent) claimed it did not fit their corporate need.

## Views from an IT advisor: Promoting true social collaboration requires more than just the tools

Of course, social collaboration tools are just that – tools. Collaboration is when a group of people are working together to achieve a common goal. Very little holistic and truly effective enterprise collaboration can happen on Facebook and Twitter. Successful collaboration strategies focus on people, not just technology.

Forward-looking companies should analyze what they consider to be "social collaboration" tools in their businesses and look to promote true enterprise social collaboration with the right tools to yield faster, more productive teams.

There are a few simple things an IT organization can do to promote true social collaboration:

1. Align technology investments and policies with the goals of the organization and the needs of the end user. Enterprise social tools must be simple and consistent with the business. Otherwise they can become another source for information overload and distraction.
2. Bring data together. Collaboration goes beyond communicating with one another – it's also about accessing information that helps employees do their jobs more effectively. Ensure human capital and data assets are not fragmented and that there are unified solutions to provide users access to the information.
3. Connect your people. There is a treasure trove of information in the minds of the individuals who make up an organization. Provide tools to easily find the people that have expertise and then give them the ability to easily connect via instant message, phone, video, email, blog, etc.

4. Communicate and then communicate more. Training, user education and change management is just as – if not more – crucial than the technology deployment. End users in an organization are never going to know how much more efficiently they can communicate and how much easier they can access data unless they know how to appropriately use the tools.

## Survey Methodology

Avanade's survey was conducted by Vanson Bourne, an independent specialist in market research for the technology sector. It surveyed:

- 1,000 C-level executives, business unit leaders, and senior decision-makers within the IT department in organizations of 1,000 employees or more in the following countries: United States, Canada, Brazil, Austria, Belgium, France, Germany, Italy, the Netherlands, the Nordics, Spain, Switzerland, the United Kingdom, Australia and Singapore. This fieldwork was conducted between March 13 and April 16, 2013.

- 4,000 end users in organizations of 500 employees or more in the following countries: United States, Canada, Austria, France, Germany, Italy, the Netherlands, the Nordics, Spain, Switzerland, the United Kingdom, Australia, China, Japan, Malaysia and Singapore. This fieldwork was conducted between January 31 and February 20, 2013.

---

"Collaboration Services: Deployment Options for the Enterprise," Forrester, November 2012.