MARKET OVERVIEW

Work Coordination Platforms Bring Structure to Projects and Processes

Improve the Employee Experience by Bringing Structure, Prioritization and Accountability to Work

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EXECUTIVE SUMMARY

Social networking applications, such as Facebook and Twitter, have created platforms where people can easily share information about almost every aspect of their lives. Similar tools are permeating the business world, enabling employees to communicate, collaborate and coordinate work with their colleagues and customers in what is often referred to as "social business."

While this new style of working openly provides many benefits, it also creates several new challenges for employees as they struggle to keep up with the growing number of people with whom they engage. Additional struggles include the rapidly growing quantity of content that people create and consume, the number of websites and applications they use, and the number of processes and projects in which they are involved. Work Coordination Platforms (formerly called Social Task Management) help alleviate these challenges by bringing structure, prioritization and accountability to work, helping employees optimize their productivity and effectiveness. The significance of the market for Work Coordination Platforms has been validated by a large number of recent funding rounds, acquisitions, initial public offerings, product launches and partnerships.

This Market Overview explains the challenges employees are facing and the importance that Work Coordination Platforms play in solving these issues. The top software vendors are listed, but Constellation Research does not rank vendors against one another. Instead, this report highlights the key areas customers should consider when selecting a vendor.
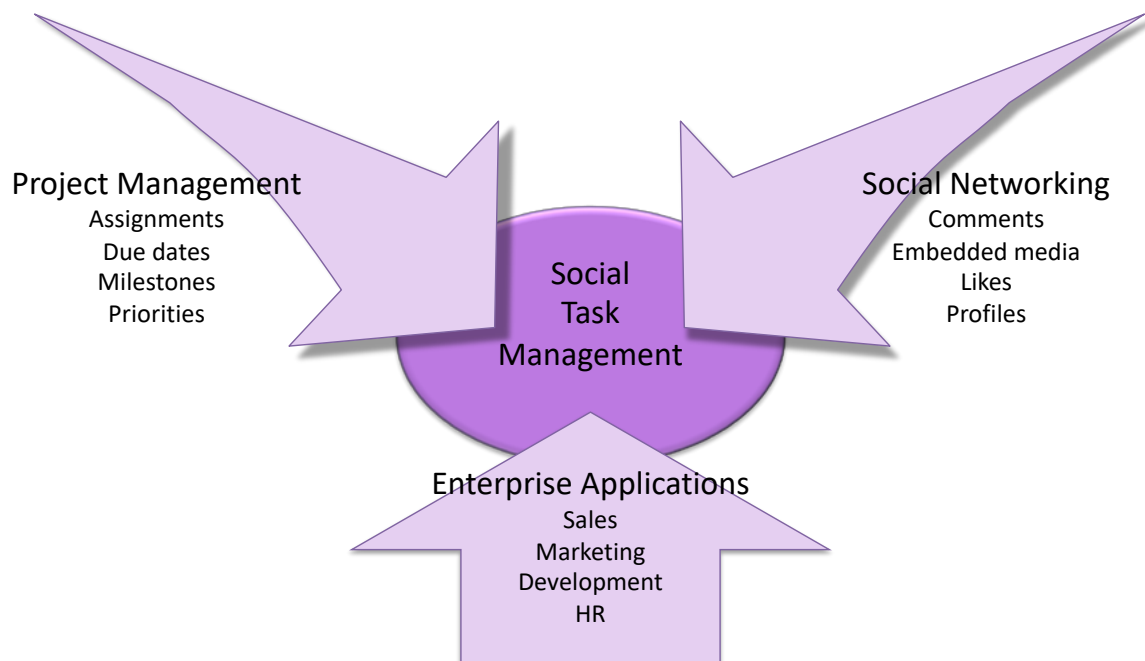
Business Theme

Future of Work

MARKET DESCRIPTION

Market Definition

In late 2012, Constellation Research published the report "Getting Work Done with Social Task Management." This report discussed the growing trend of blending project management with enterprise social networking, empowering employees to work together in a transparent manner, along with the integration of business applications so that work could be linked to the people in conversations around it (see Figure 1).

Figure 1. The Original 2012 Vision of Social Task Management

Project Management
Assignments
Due dates
Milestones
Priorities

Social Networking
Comments
Embedded media
Likes
Profiles

Social Task Management

Enterprise Applications
Sales
Marketing
Development
HR

Source: Constellation Research

The maturation of these tools has resulted in the need to update the previously established category name, as the "social" aspects are now a given, "tasks" are too limited in scope and "management" conjures up a negative perception of overly restrictive control. This has led Constellation Research to change the name of this market to Work Coordination Platforms (WCPs) (see Figure 2). The etymology of this category definition is as follows:
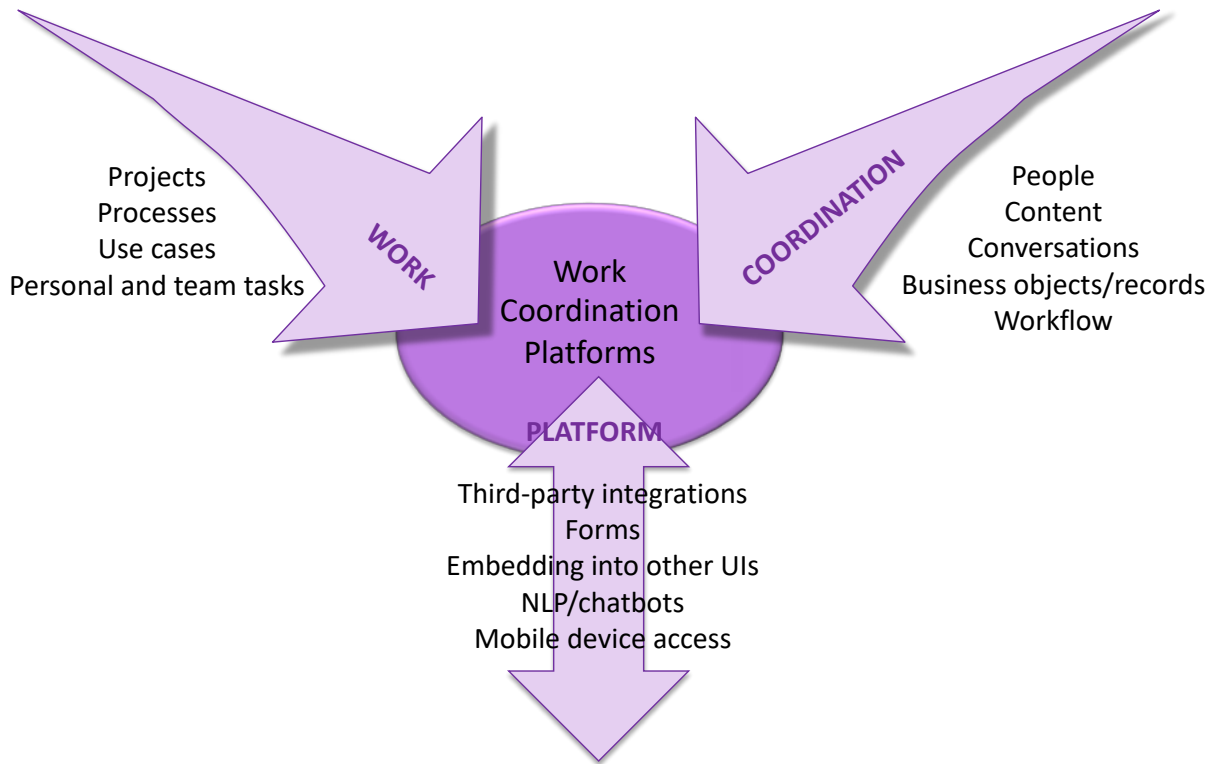
- **Work:** Rather than being limited to just projects and tasks (things with end dates, milestones, assignments, etc.), work now includes business processes, such as employee onboarding, equipment ordering/tracking, compliance checking, expense reporting and other workflow-based use cases.
- **Coordination:** WCPs bring structure to processes/workflows by organizing all the steps, content, owners and participants, conversations, reports/dashboards and insights.
- **Platforms:** These platforms are extensible, allowing for third-party integration, and can be embedded into other tools, devices and user interfaces.

Who Are Work Coordination Platforms For?

In the early days of customer relationship management (CRM), the only people who had access to the software were sales representatives and account executives. Once companies realized the value of providing customer information to everyone in the organization, they expanded availability to a larger percentage of employees. A similar trend is occurring with WCPs.

Originally, project management tools were used only by a small group of professionally certified project managers. They defined complex project road maps filled with Gantt charts and resource allocations. They monitored task status and reported the overall health of a project at set intervals, such as in weekly meetings. Meanwhile, the people "doing the work" were left to communicate and collaborate via email, spreadsheets, chat messages and other disconnected applications. WCPs eliminate these silos, empowering everyone with a single integrated application where they can organize all of the people, content, conversations and business records involved with a project or process. Everyone has real-time access to delivery status or the progress of a workflow, and they can see what is going well and which areas need help.

Figure 2. Work Coordination Platforms

WORK
- Projects
- Processes
- Use cases
- Personal and team tasks

Work Coordination Platforms

COORDINATION
- People
- Content
- Conversations
- Business objects/records
- Workflow

PLATFORM
- Third-party integrations
- Forms
- Embedding into other UIs
- NLP/chatbots
- Mobile device access

Source: Constellation Research

Five Ways WCPs Enhance Projects and Processes

As stated above, WCPs can provide benefits to all employees, not just project managers. Some of the key benefits include:

- **Organization:** Integration of people, content and conversations in a single application means that everything people need to work on is in one location. That helps provide context to all the various components or a project or process. This level of coordination keeps everyone on the same page, with current information and decisions always available. Everything people need to organize is together, reducing the need to search for things across a variety of sites and applications.

- **Prioritization:** With everything in a single place, it is much easier to extract insights into what is working and what is not. This enables individuals and teams to know what to focus on and what things can be deferred or delegated.

- **Accountability:** Working transparently results in process/task owners and assignees being easily viewed by everyone involved. Conversations can take place right within the content of the workflow, enabling everyone involved to discuss the work, decisions and results.

- **Consistency:** Core business processes usually follow a set of steps, guidelines and regulations. Defining these and creating the outline, fields, values, validation formulas and workflow can eliminate redundancy and mistakes, leading to more accurate data and better results.

- **Repeatability:** Being able to clone or duplicate an existing (successful) process can save time and reinforce the consistency mentioned above.

Market Trends

Since Constellation's original market definition of Social Task Management in 2012, a lot has happened. There have been several acquisitions, huge funding rounds for startups, new products emerging within established software suites, initial public offerings and more. In just the last two years, WCP companies have raised almost $350 million, showing the importance that investors see in this market (see Figure 3). As this is occurring, the boundaries between market categories are blurring. Areas such as collaboration, unified communication, workflow, robotic process automation, low-code applications, business intelligence (BI), chatbots and natural language processing are all morphing together, shaping the future of WCPs.
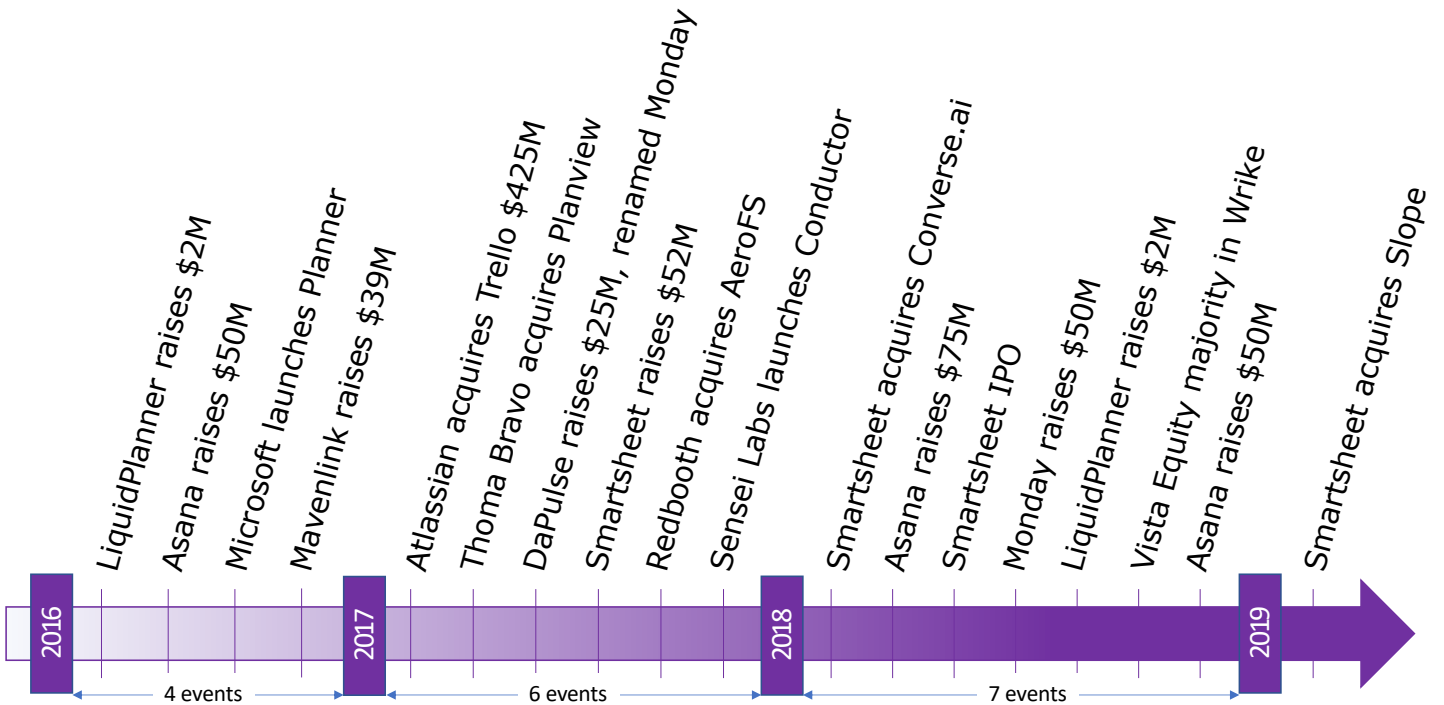
Figure 3. WCP Market, Highlights at a Glance Since 2016

$345M
raised

4
acquisitions

2
new products

1
IPO

The timeline in Figure 4 features the key events that have taken place between the start of 2016 and the end of 2018, and it shows how active this market category is.

Figure 4: WCP Market, Key Event Timeline Since 2016

LiquidPlanner raises $2M
Asana raises $50M
Microsoft launches Planner
Mavenlink raises $39M
Atlassian acquires Trello $425M
Thoma Bravo acquires Planview
DaPulse raises $25M, renamed Monday
Smartsheet raises $52M
Redbooth acquires AeroFS
Sensei Labs launches Conductor
Smartsheet acquires Converse.ai
Asana raises $75M
Smartsheet IPO
Monday raises $50M
LiquidPlanner raises $2M
Vista Equity majority in Wrike
Asana raises $50M
Smartsheet acquires Slope

2016
2017
2018
2019

4 events
6 events
7 events

IMPORTANCE TO BUYERS

Selection Criteria

The following list outlines (in alphabetical order, not priority) the areas that buyers should consider when evaluating WCP solutions.

- **Administrative controls:** How are people/groups/teams registered into the application? What directories are supported? What levels of granularity (roles) can be granted to administrators?

- **Analytics/metrics:** What type of reporting, graphing, dashboards, insights and alerts are available? Who can create them? Who can receive them? Are recommendations available for the next best action? What level of granularity is available (task, person, team, project, cross-project)?

- **Application development:** How extensible is the platform? Are there open APIs/SDKs, documentation, code samples, training materials? To which industry standards does the platform adhered?

- **Automation/workflow (process definition, dependencies):** What triggers are available and what actions can be taken? Who can configure them? Can they be shared? What reporting/troubleshooting is available? How complex can the automations be? What external tools can be integrated into the automations?

- **Business operations:** How successful is the company? What is its current funding? Is it attracting executive leadership? Is it profitable? Is it opening new locations, expanding to new geographies?

- **Business partner ecosystem:** Is it going at it alone, or are third parties building solutions/extensions/integrations for the platform? Are there ISV resellers? Are external consulting services available?

- **Client access options:** Is the solution web-only, or are there desktop, mobile, tablet, large screen and wearables options? How configurable are the clients?

- **Collaborative features:** How granular are the conversation features (task, project, folder)? Are native annotations available, or do you need to review/mark up externally? Are there native voice or video features? If not, are there partner integrations?

- **Compliance/governance:** Which regulations are supported? How many data centers are there, and in which regions? Are specific industry verticals supported?

- **Customer references:** How many enterprise-scale case studies are available?

- **Deployment options:** Cloud hosted by vendor? Hosted by partners? On-premises?

- **Display options:** How many different ways can people view the information—for example streams, kanban columns (card view), Gantt charts, grid (spreadsheet)?

- **Integration:** Which business tools/platforms are supported (for example, file sharing, web-conferencing, CRM, marketing automation, finance, customer service)? Can the service be embedded into other user experiences, such as messaging clients?

- **Licensing options (e.g., freemium, premium):** By person? By usage? How are external people licensed?

- **Marketing:** How well known is the vendor? Does it have an annual conference? Local user events? Online communities?

- **Search:** How easy is it to locate people or content within a project or across multiple projects?

- **Security:** How granular are the access levels (view access only to full manager rights)? How are external users managed?

- **Support:** What type of support is available before and after the sale? Are there online resources?

- **Templated solutions/use cases:** How many pre-configured use cases are available? Are they easy to install from a marketplace or catalog? Can customers create and share their own templates?

THE WCP FUTURE ROAD MAP

While WCPs have been maturing by enhancing integrations, adding new use cases, and improving enterprise-grade features (such as security and compliance), they are still in their infancy when it comes to becoming next-generation digital assistants. Constellation Research sees the following four areas as key to the future of WCPs:

- **Intelligence:** Using machine learning, WCPs will be able to learn from the tasks, people, conversations, milestones and other elements of projects and processes to extract trends and patterns that can be used to recommend next actions and tailor more-personalized experiences. For example, expertise location will become based less on what people say they know and instead leverage what actions people have actually taken. Next-generation resource allocation engines will be able to recommend the right people or combination of people to complete a process or project the most efficiently and effectively.

- **Proactive automation:** While workflow triggers and actions are extremely useful, they are limited by the manual process of people having to create them. Think about how powerful mail rules are in your inbox but how few people use them. To avoid the same fate, proactive automation will uncover repeatable patterns and not only make recommendations on next steps but, in some cases, take the action automatically. For

example, workflow approvals or requests for information that could happen in the background automatically instead of requiring manual intervention.

- **Personal analytics:** Analytics and BI previously have been the domain of only administrators, community or project managers, and data scientists who are looking to optimize business processes. As analytics becomes easier to understand, all participants can benefit from knowing which parts of their work have been the most effective, what has been a waste of time, what they should work on next and what they should avoid. Think of it as a fitness tracker for work, where WCPs can provide incentive on what to focus on and what to avoid.

- **Digital assistants:** The next generation of WCPs will be enhanced with personalized digital assistants that can monitor what people are working on, learn where they have problems and guide them through the trouble spots to help them complete their work. Think of it the next generation of help systems, where the software proactively assists people in getting work done.

VENDOR LANDSCAPE

Main Vendors & Offerings

There are many vendors offering Work Coordination Platforms, ranging from stand-alone software solution providers to those offering applications that are part of a larger suite. The vendors included in this report are:

- Asana	- Monday (formerly DaPulse)	- Trello
- Clarizen	- Planview Projectplace	- Workfront
- LiquidPlanner	- Redbooth	- Wrike
- Mavenlink	- Sensei Labs Conductor	- Zoho Projects
- Microsoft Planner	- Smartsheet	

Asana

- Founded in 2008. Total funding is $213.2 million, most recently Series C funding in March 2016, D in January 2018 and E in November 2018.
- Asana describes its mission as "Helping humanity thrive by enabling all teams to work together effortlessly."
- 50,000 paying organizations (50 percent outside of North America) including HBO, Overstock, Sony Music and Viessmann, plus over 1 million free users.
- In the last few years, Asana has hired several key executives in sales, marketing and engineering. It plans on opening an Amazon Web Services (AWS)-based data center in Frankfurt in 2019.

Clarizen

- Founded in 2006. Total funding is $91 million, most recently in 2014. Clarizen is part of K1 Investment Management's portfolio of software companies.
- In addition to WCPs, Clarizen supports rich automation (data entry, reporting, approvals, etc.), advanced configurability to match each customer's unique business needs (now and in the future), work integrations with other business-critical systems and data-driven resource and financial management to provide accurate business decisions. Clarizen Bot lets teams stay up to date on their projects from Slack and Microsoft Teams.
- Over 2,000 customers (two-thirds of them in North America) in 124 countries, including Box, De Beers, Shaw Industries (subsidiary of Berkshire Hathaway) and Western Union.
- Recent executive hires include a vice president of research and development and a general manager of new business.
- Hosted in data centers in the U.S. (California and New Jersey) and Europe (Amsterdam and London).

LiquidPlanner

- Founded in 2006. Total funding is $17.4 million, most recently in 2018.
- Heavy focus on resource allocation/management, calling it Dynamic Project Management or Predictive Scheduling.
- Customers include Daimler, Delta and Fanatics.
- New CEO started in 2017.

Mavenlink

- Founded in 2008. Total funding is $63.5 million, most recently $39 million in 2016.
- Mavenlink has a strong focus on professional and marketing services organizations.
- It combines work coordination features with accounting and business intelligence to help manage the entire life cycle of service-oriented projects and processes.
- More than 2,500 customers (15 percent outside of North America), including AMP Agency, Honeywell, Navigant, Qualtrics, Salesforce and Vizient.
- Recent executive hires include CFO and senior vice presidents for human resources and global sales.
- Recently expanded, with new offices in Melbourne and London.

Microsoft Planner

- Part of the Microsoft Office 365 family. It was added to the suite in 2016 and is part of Microsoft's portfolio of task management solutions, including Microsoft Project and Microsoft To-Do.
- Offers deep integration with the Office suite of products, including Microsoft Teams and SharePoint.
- In addition to enterprise usage, Microsoft Planner helps organize classrooms via Microsoft 365 for Education.
- Cloud offering hosted by Microsoft in Microsoft Azure. Planner also provides a Windows Universal Desktop App that connects to the cloud service. Planner is available in global, local and government data centers.

Monday

- Founded in 2012 as DaPulse. Total funding is $84.1 million, most recently in 2018.
- Describes itself this way: "Plan. Organize. Track. In one visual, collaborative space."
- 350,000 people, from 76 countries, in 40,000 teams. Customers include Discovery Channel, Fiverr, Philips and WeWork.

Planview Projectplace

- Projectplace was acquired by Planview in 2014 as part of its broad portfolio of work, strategic planning and resource management tools. Planview was then acquired by Thoma Bravo in 2017.
- Projectplace provides flexible workspaces for project, road map and team-oriented work with views into work assignments, status and collaboration around tasks and work delivery.
- 5,000 customers, including Akzo Nobel, Basware, Exchange Bank, Flowserve, Mentor (a Siemens business), the U.K.'s National Health Service, Oliver Wyman and PPG Industries.

Redbooth

- Founded in 2008. Total funding is $20 million, most recently 2014, then Redbooth merged with AeroFS (cloud file sync and sharing).
- 3,000 customers, including NBC, Ritz Carlton and UNICEF.

Sensei Labs Conductor

- Launched in 2017, Conductor is a cloud-based software-as-a-service platform, hosted within Sensei Labs' global private cloud environments in AWS or Azure, with data centers in North America and Europe.
- Its customers include A.T. Kearney, Newell Brands, Ottobock and United Shore.

- Three-quarters of its customers have 5,000 or more employees, with about 40 percent located in North America and 40 percent in EMEA.
- In addition to standard WCP features, Conductor also includes a full data and KPI tracking system for complex data, including budgets, benefits and savings.
- Conductor also includes a lightweight learning management system, Academy, which enables training to be delivered alongside project work. For example, Conductor can recommend a training video or documentation to coach a team member about a task.

Smartsheet

- Founded in 2005. Total funding is $113.2 million, most recently in 2017, then company had an IPO in 2018.
- Smartsheet focuses less on "project/task management" and more on helping people effectively work together on repeatable business processes, with forms, integrations and a native workflow engine.
- In January 2018, the company acquired Converse.ai, a developer of intelligent chat bots, to automate business processes.
- In January 2019, it acquired Slope, an application that enables teams to collaborate on and manage creative work.
- 78,000 customers, including Aramark, Box, Cisco, Colliers International, Hilton, MOD Pizza, Netflix, Office Depot, PayPal and World Vision.
- Significant business partner and ISV ecosystem, including DocuSign (Paperless Partner Award), Google Suite (Best Marketplace App, Recommended Program Launch Partner), Microsoft (Winner, Best Office App Award), Salesforce and Workplace by Facebook.
- Selected for the Federal Risk and Authorization Management Program (FedRAMP) Connect initiative, prioritized for authorization by the Joint Authorization Board.
- Heavily invested in its community, bringing together more than 2,000 customers at its annual conference, Smartsheet Engage.
- Recent executive team hires: senior vice president of product (previously at Amazon), senior vice president of worldwide field operations (previously at NetSuite), CFO (previously at Box) and general counsel (previously at YuMe and HP).

Trello

- Founded in 2011. Total funding of $10.3 million, then acquired by Atlassian for $425 million in 2017.
- 35 million users in over 20 languages. Many users are personal accounts; enterprise specific numbers are not publicly reported, but Trello Business Class customers include Adobe, Deutsche Bahn, Fender, Kickstarter, McCorvey, National Geographic and UNICEF.
- Large partner ecosystem with more than 100 integrations and add-ons available (which it calls "power-ups").
- Hosted on AWS.

Workfront

- Founded in 2001 as AtTask, renamed Workfront in 2015. Total funding is $95 million, most recently in 2015.
- Portfolio for "Connecting enterprise work, collaboration, and digital content into an Operational System of Record (OSR)" includes a WCP as well as digital asset management for content delivery, and Workfront Fusion for connecting to other business-critical applications.
- More than 3,000 customers (around 10 percent outside of North America), with a focus on IT, marketing and new product development. Customers include BT, Cisco Systems, Comcast, Fender Musical Instruments Corporation, Fossil Group, Trek and TSB.
- Between 2016 and 2018, Workfront hired a new CEO, CMO and CFO.
- Cloud offering hosted in six data centers representing multiple North America East/West regions, as well as EMEA.
- Annual conference is Workfront Leap.

Wrike

- Founded in 2006. Total funding is $26 million, with the most recent round in 2015. Vista Equity Partners acquired a majority investment in 2018.
- 18,000 customers, including Edelman, Google, Lyft, Panasonic and Tiffany & Co.
- Strong focus on security with Wrike Lock, which enables customers to manage encryption keys for their data.
- In 2017 and 2018, hired new CMO, CRO and vice president of marketing.
- Opened new headquarters in San Jose and new offices in San Diego, Dublin and Melbourne.
- Held its first user conference, Wrike Collaborate, in 2018.

Zoho Projects

- Can be used stand-alone or as part of the larger Zoho One suite of business (sales, marketing, customer support, accounting, etc.) and productivity (email, group messaging, documents, meetings, etc.) applications.
- Used by 10,000 (mainly small and midsize businesses with fewer than 500 employees) organizations (52 percent outside of North America), including Dell Inc., Krispy Kreme, Maserati, PwC, S&P Global, The Weather Channel.
- Projects allows project managers to focus on three aspects: planning, tracking and collaboration.

Where to Look for Differentiation

As expected, the standard checklist of features such as tasks, fields, forms, and assignments is very similar across many of these platforms. From a pure product perspective, buyers need to evaluate the more advanced features such as analytics and reporting, automation and workflow, form creation capabilities and third-party integration. Additionally, buyers should consider several company-level aspects, evaluating areas such as:

- Do the company's public statements of direction come off as truly unique or even inspiring? Do they match the goals and needs of your organization?
- Is it going beyond just routine project management and focusing on the end-to-end processes that run your business?
- Is it partnering with the third parties that augment those workflows?
- Is it focusing on areas such as machine learning to help automate steps and create consistency in data entry?
- Is it helping not just manage projects and processes but educate users on best practices to optimize efficiency?
- Does it have customer references in your industry? Does it have services that understand your industry so that it can tailor the solution to your specific needs?
- Does it have a community where your company can interact with others doing similar things?
- Does the company have positive momentum in areas such as revenue, geographic expansion, business partner ecosystem or third-party integration?

RECOMMENDED ACTIONS

Work Coordination Platforms have the potential to dramatically improve the way both individuals and teams get work done. Rather than switching between a plethora of tools including email, social networking, project management, file sharing and business applications (CRM, HR, ERP, etc.), WCPs provide structure enabling people to organize, prioritize, communicate and collaborate on the processes and projects vital to business success. Sales teams can reduce the time it takes to move a lead from prospect to client. Marketing teams can make sure they never miss a step when creating new collateral, promoting a new product or planning for an event. Engineering teams can prioritize their assignments and make sure customers get the features they really need. No matter what the use case, WCPs can help employees go from overwhelmed to optimized.

Here are five steps organizations should follow when considering a WCP:

1. **Document the tools currently in place.** Start by taking an inventory of existing tools that employees use for communication, collaboration, coordination and documentation. Most organizations will find a mixture of official companywide solutions, homegrown products, departmental tools that may not be approved by corporate IT and software that may never have been put into production ("shelfware"). Determine which of these tools are being used effectively and which can be eliminated.

2. **Investigate which WCP features the current tools provide.** Based on the findings in Step 1, decide if the existing solutions:

   a. Have native WCP features
   b. Have WCP features on the near-term road map
   c. Offer integration with any specific third-party WCP providers
   d. None of the above

3. **Narrow the list of choices based on the results of Step 2.** Use the list of products in the Vendor Landscape in this report and investigate which best meet the selection criteria (listed above) for your organization. While the criteria list is long and prioritization will differ for each organization, a few key items to consider include:

   a. Integration with the other enterprise systems (such as CRM, file-sharing tools, email/calendar, unified communication)
   b. Ability to customize the look of the product to match corporate branding
   c. Enterprise-grade security and scalability

4. **Identify a pilot candidate.** Choose one or two lines of business that currently have defined processes for their tasks but are looking for ways to improve collaboration.

   - Engineering and product development are often good choices because these groups tend to have defined processes in place, which can be used to test the WCP products. These employees also are already disciplined when it comes to following processes

and documenting their work. Finally, the technical nature of the projects they work on should provide a good opportunity to test the integration capabilities of the WCP.

- Marketing teams are also a good choice because they tend to be skilled at communication and collaboration aspects and could be quick to adopt the new WCP tools. Since marketing professionals are often the most vocal inside an organization, if they like the new solution, they can be instrumental in championing its use with other groups.

5. **Measure the metrics that matter.** Take measurements of a typical project or process before the WCP is used and then again afterward. Don't determine success solely on quantifiable results such as time and/or money saved but also talk to survey project members to see if teamwork and knowledge-sharing improved. These elements could have dramatic impacts in other areas, especially employee job satisfaction. As the project progresses, make sure to measure WCP adoption numbers so that you can see how the usage of the tool is progressing.

Alan Lepofsky
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With almost two decades of experience in the collaboration software industry, Lepofsky helps organizations improve the way their employees work together to get their jobs done more effectively. His primary research area, *The Future of Work*, includes:

- Integrating collaboration and business processes, or Purposeful Collaboration
- Structuring work with Work Coordination Platforms
- Leveraging analytics and digital assistants to work more productively
- The strategic impact of mobile computing on business transformation
- Measuring workforce culture based on Digital Proficiency instead of age

Since 1993, he has been designing, marketing and helping customers deploy software solutions that enable people to connect with their peers and openly share information. Prior to joining Constellation, Lepofsky spent three years as Director of Marketing at *Socialtext* and, before that, 14 years in a variety of roles at *IBM/Lotus*.

He is an active blogger and speaker in the "Social Business" and "Future of Work" communities, where he shares his thoughts on the business benefits of open communication and collaboration. He graduated from the University of Toronto with a B.A.Sc. in Engineering. His major was Mechanical Engineering with a minor in Business and Entrepreneurship.

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ABOUT CONSTELLATION RESEARCH

Constellation Research is an award-winning, Silicon Valley-based research and advisory firm that helps organizations navigate the challenges of digital disruption through business models transformation and the judicious application of disruptive technologies. Unlike the legacy analyst firms, Constellation Research is disrupting how research is accessed, what topics are covered and how clients can partner with a research firm to achieve success. Over 350 clients have joined from an ecosystem of buyers, partners, solution providers, C-suite, boards of directors and vendor clients. Our mission is to identify, validate and share insights with our clients.

Organizational Highlights

· Named Institute of Industry Analyst Relations (IIAR) New Analyst Firm of the Year in 2011 and #1 Independent Analyst Firm for 2014 and 2015.

· Experienced research team with an average of 25 years of practitioner, management and industry experience.

· Organizers of the Constellation Connected Enterprise—an innovation summit and best practices knowledge-sharing retreat for business leaders.

· Founders of Constellation Executive Network, a membership organization for digital leaders seeking to learn from market leaders and fast followers.

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