2023





# INTRANET AND EMPLOYEE EXPERIENCE PLATFORMS

Reviews of the best products on the market

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SECTION ONE

INTRODUCTION



# **Preface**

During 2022 we saw further evidence that hybrid working may now be the norm and this latest edition of our report shows how intranet and employee experience vendors have been responding. For example, intranets and employee experience platforms make a real difference. They are strategic investments that drive organisational benefits and support employees through their working day. An intranet helps people get things done, stay informed about what's going on, and help find that person, that application or that little piece of data they need, now. Intranets and employee experience platforms contribute to the way an employee feels about the place they work, encourage and reflect organisational culture, and can even

improve levels of customer service.

Intranets have been around for more than two decades and through constant evolution they are still delivering value today. The concept of 'employee experience platforms' is newer, but they are also developing quickly. Additionally, internal communicators have always been heavily involved in intranets in the past, but we've seen a recent surge in features to address their needs in particular. Many tools that were historically labelled as 'intranets' are also being called 'communication platforms' or similar. Overall, this a highly mature market with excellent choices of software and some sophisticated solutions available to suit different organisational needs and types of workforce.



### Seven years of experience

Given the number of options available, it can feel like a complex space for those looking to implement something new. At ClearBox, we've offered support to buyers for seven years through dedicated review reports; we were the first intranet experts to publish an independent and vendor-neutral guide to intranet software. This report reviews 'independent intranet' and 'SharePoint intranet in-a-box' products against the same criteria, an unusual approach that will help you compare products from across the market. We're more confident than ever that this report will ultimately help you select the correct product for your business, underpinned by our industry knowledge and passion for the intranet space.

### Employee experience

'Intranet' isn't the only word in the title, however - we've also included 'employee experience platforms'. Employee experience refers to how a business engages with its employees throughout their working day and life, and the responses an employee has to those touchpoints. In the context of this report, the previously referred to engagements and responses are achieved or are the result of an intranet, communications platform, collaboration tool, or similar. We've included reference to employee experience platforms because it is commonly used in the marketing of many of the products here. We don't want to give the impression that buying a tool solves all your employee experience needs, just as no single tool constitutes a digital workplace (something we've pushed back against for years). However, with the growth of remote and hybrid work, there's no doubt that the digital element has grown in importance as an employee touchpoint. Additionally, many of the technologies we've seen go well beyond the scope of a classic intranet.

### Workplace changes

We've been fascinated to see how vendors have responded to workplace changes brought about by the pandemic and how all elements of an intranet have come to the fore; communication, engagement, social interactions, orientation and just being a reliable source of information in a sometimes confusing and unsettling period. The need for a strong mobile experience has also emerged more firmly in recent years, whether for frontline or hybrid workers. We hope that this guide helps you make the right choices to move your own organisation forward, address the employee experience needs you've uncovered, and drive value in the years ahead.

### Our highlights

We have extensively reviewed over one-hundred intranet and employee engagement tools over the past few years. Some areas make these freshly reviewed products stand out - here are our top five findings:

- Internal communicators will be pleased by the hybrid publishing tools on offer
- Mobile and frontline solutions continue to improve
- · Individuals and businesses will appreciate the sense of community that can be created
- Integrations with M365 applications are improving
- Onboarding tools reflect the change to hybrid working.



#### Hybrid publishing tools

In an attempt to reach people where they're working, both physically and digitally, internal communicators have a variety of digital channels at their disposal. This includes channels such as email newsletters, digital signage, social tools like Yammer, external channels (LinkedIn for example), as well as formal news spaces on the intranet, and more. We've seen an increase in the number of platforms that provide tools to help internal comms teams manage the flow and collaboration of news across all these channels, delivering a solid hybrid publishing approach that previously was reserved for dedicated communication tools.

#### Mobile and frontline solutions



Native apps are common now and we've been pleased to see the approach vendors have taken evolve over recent years. Historically, app solutions would replicate the intranet environment onto mobile, which was fine but often cumbersome on a smaller screen. Vendors now commonly provide solutions that can be configured to adapt

to different device types and associated audiences. We're also pleased to see the variety of approaches being taken by vendors means that businesses with different needs have choices available to choose from. For example, those that want to meet communication or social needs, or those that want a more practical tool, each have solutions to browse.

#### Sense of community

Events over recent years have highlighted how important it is to build and maintain a sense of community within an organisation. Communities build bonds and provide a way to share expertise among colleagues. Additionally, communities can act as a brand indicator, allowing businesses to highlight what matters to them or may reinforce organisation visions / values. Spaces for wellbeing, sustainability, LGTBQ++, or even a pets' corner, will show employees what matters to their company and colleagues, as well as support them as individuals. Vendors have recognised these benefits and provide a variety of options to meet community needs.

#### Integrations with M<sub>3</sub>65

Many organisations have invested in the Microsoft suite, with MS Teams reaching 270 million users in 2022. While we've seen businesses decide that they don't necessarily need to use SharePoint as their intranet, there remains a need for intranets to complement Microsoft applications. Most vendors have recognised this need and introduced solutions to integrate Microsoft applications into their platform, or to integrate intranet elements into Microsoft.

#### Onboarding tools



The shift to hybrid working, allowing people to work from home, the office, or a blend of the two, poses an onboarding challenge for new employees joining an organisation. Intranets have always offered onboarding features, such as tools to build 'about the business' or 'new employee' areas, electronic forms, etc. These

features have expanded over recent years and are more sophisticated, for example timed messaging drips communications to joiners and once set up admins no longer have to worry about the process. Even learning tools are becoming more common, which can be used in combination with other features to provide a helpful suite of onboarding capabilities.



## What we'd like to see more of

Although every product is different and features are approached in different ways, there are some gaps that could be filled more consistently.

#### Analytics have improved but are still disappointing

We've been pleased to see improvements in the analytics on offer from vendors over the past eighteen months, with some doing a superb job and raising the bar of expectations. However, this remains one of the lowest scoring scenarios in our report despite it being an area of importance for clients. We've been told by vendors that they will customise reports for customers, or that there are different needs from different clients so it makes it hard to standardise reporting. We feel that the foundation of analytics could be vastly improved and standardised, with tailoring or tweaking on top to suit individual needs.

#### Integrations could be more extensive

Many intranet teams set out with an ambition to be a workplace 'hub', but they won't fulfil it if transactions immediately take employees to other systems. Vendors often rely on open APIs and / or customisations to integrate with business systems, however this makes it difficult to see what the quality of these integrations will be like in practice.

#### Legacy features are often forgotten

We've consistently seen legacy features left untouched for years while vendors release new tools, many of which are designed to tempt new business and sometimes at the expense of existing customers. In recent years we've also seen an increase in the number of features, or modules, offered by vendors; while it's helpful to provide flexibility, this can sometimes be at the expensive of the overall experience or may mask costs. So, we'd like to see the disparity between functionality addressed so that there's a consistent experience across all areas of all products and so that buyers have a clear idea of costs upfront.

#### Accessibility standards need to be brought up to scratch

At least 1 in 5 people in the UK have a long-term illness, impairment or disability; while in the US 26% of adults have some type of disability. In Europe the Accessibility Act took effect in 2019 and it's now mandatory for public sector organisations, such as government departments, in the European Union and the UK to have digital tools that conform to accessibility standards. It's time for vendors to do the same. Some vendors also doing a good job, but many have very little in place. Diversity and Inclusion is an area of focus for many companies now, so this should extend to digital tools as much as broad-brush policies.

### A final thought

Although there's always room for improvement, what this report illustrates more than anything is just how many excellent options are available to organisations looking for a new intranet or employee digital platform. The technology is mature, you no longer need to rely on in-house IT experts just to get the basics underway, and there are some genuinely innovative features coming through. It's a great time to update your intranet or introduce an employee experience platform.

Suzie Robinson, ClearBox Consulting, January 2023





# AN OVERVIEW OF THIS REPORT

#### The report is split into three sections:

## 1

#### Section One: Introduction

- How to use this report What each part of the reviews contain and how we evaluated them. The 'scenario definitions' and 'company and product tables' pages are particularly helpful.
- Product comparisons We capture a lot of information during the review writing process, so we've collated tables and charts here for you (including scores and technical information from across all products). Our ClearBox Intranet Choices for 2023 are also here.
- How to choose a product How to select a product (and what process we recommend you follow to do this), including the case for choosing SharePoint-based solutions or looking more broadly.







#### Section Two: Full Reviews

Longer format reviews that assess products against business scenarios that we've devised based on experience (from our work with clients and working in the industry). Also includes lots of screenshots and technical data.









#### Section Three: Product Overviews

Shorter format reviews, which cover products that are still worth considering for your shortlist but aren't assessed against our scenarios. We've included our views of the products (following a short demonstration), screenshots and there is technical information too.









# TRAINED PUBLISHERS CREATE BETTER CONTENT

When you rely on departmental contributions as part of your internal communications, you'll want to provide training to support your publisher community.

Our modular interactive webinars cover the basics of drafting and publishing truly useful pages, and stress the importance of addressing users' needs.

# LIVE, INTERACTIVE WEBINARS

Four or five hours of training over a week or fortnight, with exercises and discussions.

# BRING YOUR STYLE GUIDE TO LIFE

Topics match and emphasise your existing guidance.

# COMPETENCE AND CONFIDENCE

Help non-experts feel ready to write and publish.





# **How to Use This Report**

We've created this section to give you a little context behind our reviews.

We've provided an overview of what each full product review contains, which is a simple diagram with explanatory notes. There's an explanation about how the scores work and how we gathered the pricing information. Each scenario has been detailed, so you know which business situation was explored and where. Finally, you'll find a description of what we asked vendors so that we could complete the 'company and product' tables.



# PRODUCT REVIEW FORMAT

 Introduction to the product





- Details of the company
- Technical specifications and support



workvivo 🔂 Haiilo 🕑 happeo

- · Overview of scores
- · Overview of pricing
- Key strengths, improvements, and considerations

- Product type and branding opportunities
- Our opinion on their target business size
- What system (if any) forms the foundation of the product
- The sectors they target
- If you like this product, you may like these others





· 'Voice of the customer' feedback



- A write up of our findings for each scenario
- · Scores for each scenario

mind when considering the product

• Summary of why you should choose the product



 Highlights and illustrations of some of the most interesting or well-done features



## A note on SharePoint products



Any product that needs SharePoint in order to work has this icon displayed in the introduction and as part of their review. Each of these products are likely to make use of SharePoint's basic features and we've highlighted where they bring added value or where SharePoint features have been obscured.

Please see the 'SharePoint Online and Viva' review to see what basic features are on offer, but then refer to each other product to see what's done better (or possibly worse). The 'product comparison table' collates all scores, which will also be helpful for you to compare. Additionally, SharePoint often makes use of other Microsoft applications that can be in direct competition with vendors' tools. This means you may find some vendors ignore SharePoint or Microsoft features in favour of their own. Where there is functional overlap, you'll have to carefully consider which is the correct approach for your business to take.



## SCORING AND PRICING

## **Explanation of scoring**

No one product is the same as another and each approach the scenarios in different ways. Our scoring aims to be accurate and simple, to provide a point of comparison between products, but there are some aspects to explain:



Product score – How far the product addresses the scenario.

Optional extra
- Features that
may be added
at extra cost
and / or effort.

Potential score - All scores are out of five; empty spaces indicate where the product did not score full marks, which may be because the product includes features for only part of the scenario, where the features just don't meet the criteria set in the scenario, or where the product doesn't include the feature.

#### Scoring examples



This isn't an area that is addressed by the product.

score 2.5

Half of the scenario criteria have been met. This may mean that the features aren't as extensive as we would hope, or it may mean that the product doesn't address features that form part of a scenario.

SCORE 2.5+

Half of the scenario criteria have been met again. However, with additional time or money invested the product would be improved and score the maximum of five points.

## **Explanation of pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
<b>1,000</b> users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

Very few vendors are willing to publicly show pricing for their products, as there are many configuration dependencies, or potential volume and sector discounts to consider. To help you group products by price range, we asked each vendor to quote a list price for 250, 1,000, 5,000, and 20,000 users over three years, with only the basic services needed to install the system.

We picked three years as a realistic life cycle for an intranet, and to smooth-out comparisons between 'per user per month' pricing models and those that have a high initial fee but then low ongoing maintenance costs.

Where vendors had multiple price options, we have matched the pricing to the version we reviewed and used the 'optional extra' score to show what could be achieved at a higher price point (see the explanation of scoring symbols, above).

## Observation of SharePoint and independent intranet pricing

According to our report (and generally speaking), independent intranet products are more expensive than those that rely on SharePoint. Independents must develop all aspects of their product, as they cannot rely on SharePoint's framework, so arguably there is more development costs associated with them.

However, it's worth noting that the SharePoint dependent products have quoted for the cost of their product licensing only. While you may have Microsoft 365 (M365) licenses anyway (for Word or Outlook for example), some plans are very expensive for all features (such as the full Viva experience). Including SharePoint / M365 licenses would make add-on products significantly more expensive than their independent cousins, particularly for larger businesses. It's worth considering all costs when researching costs associated with your intranet, especially if you plan to include frontline workers that may not currently have M365 access. We're pleased to see some SharePoint-based products offering options for frontline worker access that get around this requirement though.



## **SCENARIO DEFINITIONS**

We evaluated each product in our full reviews against the ten scenarios below. We don't dictate a long list of specific features, but instead outline common employee needs. We then ask the vendors to demonstrate how they would address the scenarios in whatever way they see as the best approach.

## User experience and visual appeal



We wanted to see the overall experience of using the product from an end-user's perspective. This not only included the branding / look-and-feel that can be achieved with the site, but how people may choose to consume the content. This scenario explored:

- The overall quality of the user experience, such as whether notifications are easy to find and whether the interface is contemporary in its approach.
- How easily users can navigate through the site using well-structured menus, targeted menu options, and visual cues.
- Whether the branding options are flexible, without any platform constraints or issues with upgrades applied at a later point. The overall visual impact of the product was also considered here.
- What support was offered for businesses that may want sub-brands, such as where part of the organisation has a distinct identity (for example PlayStation within Sony) or where a business may want to reflect multiple locations (such as Hilton in Las Vegas vs Hilton in Paris).

## Mobile and frontline support



People often need to access information or check updates away from their desk (or have a role that is entirely deskless). We asked vendors to show us how their product made it easy to deliver an engaging experience on devices such as mobiles, tablets and on shared screens. We wanted to see:

- What solutions were offered to help businesses enrol users onto the mobile version of the site, particularly where users may not be on central databases or where centrally held contact information may be incomplete.
- The ease of use and whether the experience mirrors a consumer app.
- What features were present on the mobile experience to support the needs of frontline workers.
- How easily admins could control the content and layout of the app, ensuring that anything
  presented was suitable and relevant to mobile users.

#### Internal communication



Internal communicators will often rely on these platforms to reach their audiences, so we wanted to see what tools were available to help them create, manage, and reach people. This included different news types, crisis communications, and ways of reaching people beyond the given platform. We tested:

· What tools were available to build appealing and effective content using a range of media, as



- well as how easy this experience was.
- Whether content could be easily promoted or highlighted, such as through prominent positioning in web parts / widgets or through 'pinning'.
- How content could be dynamically and flexibly targeted to individuals or groups, and whether individuals could also opt in or out of channels.
- What tools were available to manage content, such as life cycle features including publish / expiry dates, publication workflow settings, or a central news repository.
- Ways that messages could be published in one place but reach audiences wherever they may be, such as through digital signage.

## Community and engagement



To really engage employees, we need to give them a voice. We wanted to see how platforms facilitated dialogue with employees, the gathering of feedback, and the ability to take a 'temperature check'. Some of the best internal content can come from people sharing thoughts and generating ideas together, so we also looked at

how internal communities were cultivated. We explored:

- How users could react or interact with content, such as through liking and commenting (including what moderation features were available).
- What social collaboration or communities of practice features were available, such as themed discussion boards, wikis, blogs, or activity feeds (similar to those that could be found on a social media site).
- How HR or internal communicators could gather thoughts and opinions, for example using surveys, polls, or ideation tools.
- What other 'people' oriented features were included to help encourage themes of wellbeing, engagement, and inclusion. This could include recognition schemes, mindfulness features, or onboarding processes.

### Information finding and knowledge management



Finding information can be a challenge for users as sites increase in size. We wanted to see how the products approached findability and ease of information seeking. Some platforms support Enterprise-wide search and we welcomed any demonstrations that went beyond the intranet. We wanted to see:

- What the search service and experience was like on the platform. This included clear and accurate results being returned, the potential to refine results dynamically, the indexing of content (documents in particular), and an attractive interface.
- How admins could influence results, such as through promoted results, or the way the information was returned, for example through configurable results pages.
- In what ways users could feedback on search, for example through ratings, feedback forms, but also through reporting.
- What the people search experience was like, again through clear and attractive results, plus a detailed organisation chart, and useful suggestions such as type-ahead or alternate spellings (Suzie Susie Susy Suzy etc).
- How the product encourages user browsing to navigate information. This could be through an
  attractive presentation of longer documents or policies, such as an employee handbook. Or
  it might be through a dedicated 'knowledge base', complete with ways for users to indicate
  where accurate data can be found.



### Admin experience and governance



It's important for all users to have a good experience when working with an intranet. We therefore wanted to see how easy it was for administrators and publishers to manage the site as a separate experience from end-users.

This scenario explored:

- The different menus and options that were open to admins and how complex tasks were made easier.
- What tools were available to build or configure the home page(s) and / or other landing pages. We wanted to see features such as templates, a variety of web parts / widgets, and elements to help such as info buttons.
- Tools for flagging outdated / under-used content or ways for users to give feedback, as well as mechanisms for managing content life cycles.
- How multiple languages were supported from a user and publisher point of view. For
  example, the ability to change languages for both the interface and content or helping
  publishers with translation workflow.

## **Analytics**



Intranet managers and content owners need to be able to measure the effectiveness of their intranet, which not only shows the performance but will lend guidance to ways to improve the site too.

We have tested:

- What information was available to admins so that they can get an idea for site-wide and individual section content usage and adoption.
- How the analytics deliver actionable insights that help improve the way the intranet is managed, not just generating numbers because they can; and how the data could be adapted to suit a business' specific goals.
- Analytics and tools for communicators, such as ways to measure communication campaign performance or A/B testing.
- Support of mandatory reading and search analytics, such as to help admins identify when users give up on search terms or where there are gaps in results.

## Digital workplace integrations



Digital workplaces are often a fragmented set of tools, so we wanted to see how the products helped simplify an employee's experience. For example, integrations with systems to reduce the number of sites, apps, or platforms someone must visit, which could be through links, iframes, or fuller integrations, and where an 'external' activity

is brought through into the intranet. We explored:

- How integrations with common enterprise systems, such as Salesforce, Workday, or Zendesk, were presented on the intranet. This could include dashboards, iframes, or actionable notifications.
- How the products supported sources such as Dropbox, Box, and Google Drive as cloud file sources to collaborate and share. We wanted to see how users could interact with this content, as well as whether the content felt like a part of the rest of the site.
- · Whether the search would federate content from some or all integrated systems.



## Microsoft 365 integration



The Microsoft suite is pervasive, and many companies want their intranet to work well alongside their M365 investment, even if they have chosen not to use SharePoint as a publishing platform. Other businesses have chosen to go a non-Microsoft route such as Google Workspace, so you can skip this scenario if it isn't relevant. We wanted to see:

- What kinds of content could be integrated into the intranet product from SharePoint. For example, could a document library be surfaced, or could users post into SharePoint news or show SharePoint news stories.
- How an integration worked with MS Teams, covering conversations, documents, and calls. MS
  Teams can generate a lot of notifications, so we wanted to see how these were handled too.
- How far Yammer was integrated, for example could it be used as an alternative social tool embedded within the platform?
- To what extent Microsoft Viva has been introduced to the product, particularly Viva Connections.
- · Whether the search would federate content from across Microsoft applications too.

#### Wildcard



The last scenario we left for the vendor to choose – it was their chance to shine! We asked them to show us one of three things. One, whether the product does something so unique that we haven't covered it in our scenarios. Two, whether a series of elements pull together into one feature that needed to be looked at

separately from our scenarios. Three, where something is done well but only falls as part of one of our scenarios (these we consider 'bonus points'). We then awarded points for good execution and businesses benefit.



# 'COMPANY AND PRODUCT' TABLES EXPLANATION

Each review includes a 'Company and Product' section, which covers details of the most common non-functional requirements that we have identified. This section will speed up the RFP or tender process, as quite often these 'non-functional requirements' can be a show-stopper for an otherwise promising product. Here's an overview of what these sections cover.

## Company details

	Company	The vendor company name, this can often be the same as the product, but not always.
	Company founded	How well-established a vendor is may be a factor in deciding to partner with them.
	Company locations	Some vendors have offices in a variety of locations and finding a vendor that's local might be important to you.
	Customers	Vendors tell us up to five sectors that their clients typically fall into, and this is presented earlier in the review. However, we also include this section so that they can name up to ten of their clients, so you can see who they have worked with in the past. Sometimes there is a link out to their website for more case studies.
222	Typical client size	We ask this to give you an indication whether the vendor is used to working with businesses of your size. Whether you are very large or very small, each comes with its own challenges and ideally your vendor will be familiar with these.
al	Largest deployment so far	This will be important to enterprise-scale businesses as it gives a sense that the vendor has a track record with large deployments.
(A)	Partner locations	Some vendors work with partners across different regions who will help with the set-up and support of a product. Even if the vendor isn't local, they may have a partner who is.
ISO	ISO 27001 certified	ISO 27001 is an international standard on how to manage information security. We have highlighted where vendors have been awarded this certification, and / or what else they have in place.



## **Product details**

Name of product	The specific product we reviewed.					
Product launched	This gives a sense of how established the product is.					
Current version	This highlights the version number we have reviewed, so you will know whether there have been updates since the review was written. It also gives you an idea of how active a vendor is in enhancing their product.					
Accessibility	Accessibility is about designing intranets to assist those with a disability, impairment, or other difficulty. For example, high contrast text / backgrounds, and scalable font sizes can help with visual impairments; keyboard shortcuts assist people that have difficulty using a mouse. This is an important area as many countries have legislation to protect against discrimination. We have highlighted where products conform to WCAG 2.1 standards.					
Deployment	There are a variety of factors that will influence where your company is happy for your intranet to be deployed and hosted, such as within your country, or the sensitivity of the information you handle. We have asked the vendors to indicate where they can support the intranet being deployed onto your private cloud or on-premises server. Alternatively, they may use web servers, such as Microsoft Azure, Amazon Web Services, or your Microsoft 365 tenant. Finally, some vendors may host themselves or have another solution available.					
Data residency	It's important to know where your data will reside if the vendor is the host (as covered in the previous question). Some companies may not want to have data held outside of their continent, for example.					
Client data encrypted  Where data is stored outside of your facilities (i.e., it's not hosted in your closer or on your server) we asked vendors at what point(s) data is encrypted. This could be in transit only, at rest only, or in transit and at rest (no product has no encryption). This is where the sensitivity of the information you handle winfluence what products you can shortlist, based on their responses.						
Authentication supported	The digital workplace is vast and so reducing the number of times and places users have to sign in is a big bonus. We have asked vendors to tell us the different methods that their product supports. We expected them to support a mix of Azure Active Directory, ADFS, Open ID, Oauth, and Google Workspace, although we do provide space for them to tell us about any others they support.					
Search Technology	There are a variety of enterprise search solutions available to intranet developers to build into their products, we've asked them to indicate if they use one of four common solutions or something else. These solutions provide a good foundation to build from, or indeed a strong approach to content retrieval for your users. For more information on search and what makes it so important, please have a look at the resources available through Intranet Focus.					



Document library sources integrated	All of the products we have reviewed have their own approach to document libraries. However, you're likely to have other cloud repositories in your business and here is where we have asked vendors to share which they will support. The detail of how Box, Dropbox, Google Drive, SharePoint, OneDrive and others are integrated is covered in the scenarios.
SharePoint / M365 versions supported	Some products rely on SharePoint in order to work, while others will optionally work with SharePoint where wanted. In this question we've asked vendors to tell us which versions of SharePoint they will support.
Mobile app deployment	There are four common methods for apps to be downloaded onto a mobile device. The first two rely on users downloading themselves via the Google Play or Apple stores. Despite in-built security measures to manage ex-employees, organisations can feel nervous about allowing users to download 'company apps' via public stores. The third method is therefore via mobile device management where an IT team takes responsibility for device content. Similar is the fourth method, mobile application management, where IT takes responsibility for individual apps on a device.
Reverse-out options	We know that not all relationships work out. Where this is the case with your intranet vendor, you need to know that your data is your own and that you can easily extract what's yours (to move into a new platform). Vendors have summarised that information for us here.
Languages supported	We have asked vendors to share what languages they support through their product, whether this is for translation or interface purposes. It's worth noting that vendors may be able to add other languages on request.
Machine translation	We've also asked vendors to indicate whether they support machine translation (for auto translation on-the-fly) via the product, rely on the browser, or something else.
Right to left script	Support for Hebrew, Arabic and other right-to-left script languages is important for some organisations. We've asked vendors to tell us whether this is something they can support, but is worth noting this could be something they could develop on request.



# Set-up and support

Set-up process for new clients	An overview of what a set-up process involves, including typical timescales for deployment.
Product updates	The frequency of product updates varies and can range from every two weeks, to every few months. While that may not be too much of a concern for you, the resulting impact on users when a new feature is launched will be.
Product update process	We asked vendors to explain how product updates are rolled out to customers. For example, they may choose to update everyone at once, or you might be able to influence the timing, or if something goes wrong then what are the options for rolling back an update.
Technical support	This covers channels for technical support such as phone / email / chat. Support hours can be particularly important for multi-national companies as many vendors only offer support during their own office hours. The customer feedback in the 'voice of the customer' sections will give a sense of service levels.
User community	Learning from others in a similar situation is a great way to develop how you use an intranet in your business. Vendors have provided an overview of what community spaces or activities they have on offer.

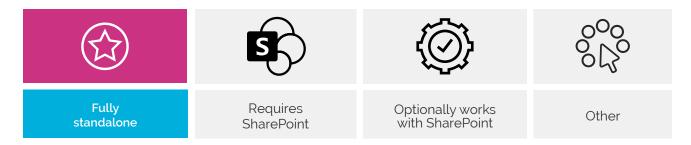


# TELLING THE DIFFERENCE BETWEEN PRODUCTS

Each review includes four icons labelled 'base systems':



The SharePoint icon also appears in the index, so you can quickly jump to those that require SharePoint only. The other icons are in our 'technical table' of comparisons.



This icon reflects that the product is an independent intranet, or similar product, that doesn't require SharePoint, Google Workspace, or anything similar in order to function.

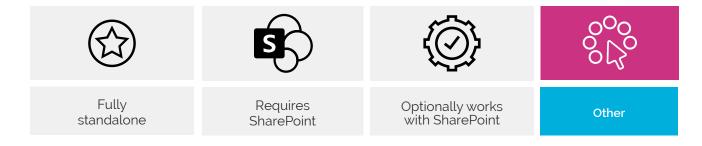


SharePoint intranet in-a-box products and those that work on top of SharePoint are included here. These products must have SharePoint in the background in order to work.





These products can be used stand-alone but have also been designed to work closely with SharePoint as a document repository, for example.



Finally, this icon is for those products that might rely on Google Workspace, Drupal, or something else in order to work. We've explained what it means in each case where it's used.



# OPERATIONAL GOVERNANCE TO SUPPORT STRATEGY

ClearBox can help you develop governance that simplifies working practices and supports your digital strategy.

We'll consider your internal comms and engagement goals, and the needs of your central service colleagues, operational staff, and frontline workforce.

# PROPRIETARY FRAMEWORK

The ten dimensions of the digital workplace brings clarity to the sprawl.

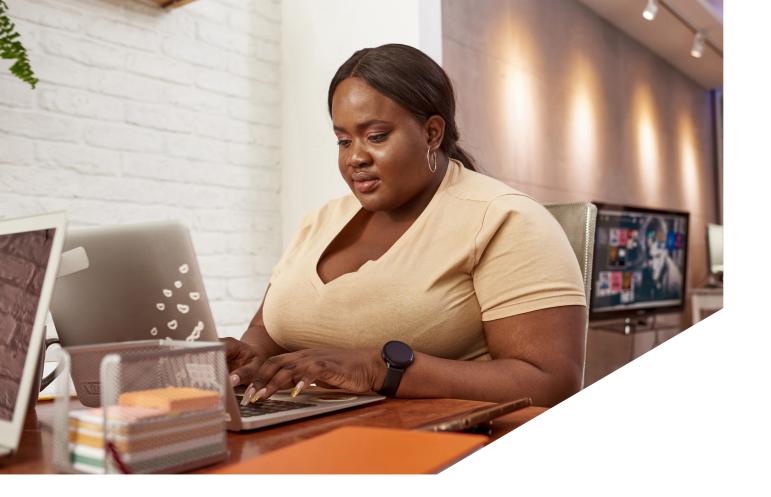
# SHARED UNDERSTANDING

Our collaborative approach builds trust between stakeholders and across departments.

# BUSINESS NEEDS AND USER NEEDS

We focus on required outcomes before we consider solutions.





# Product Comparisons

We collect a lot of information during the creation of this report and so it helps us as much as you to collate some of it!

The 'product comparison table' aggregates all scores and pricing across the full reviews. We've then presented some of this information as a chart showing value vs price. A 'technical table' summarises the key company and product information across all reviews (full and product overviews). Finally, we've selected our ClearBox Intranet Choices for 2023 and you'll find those here.



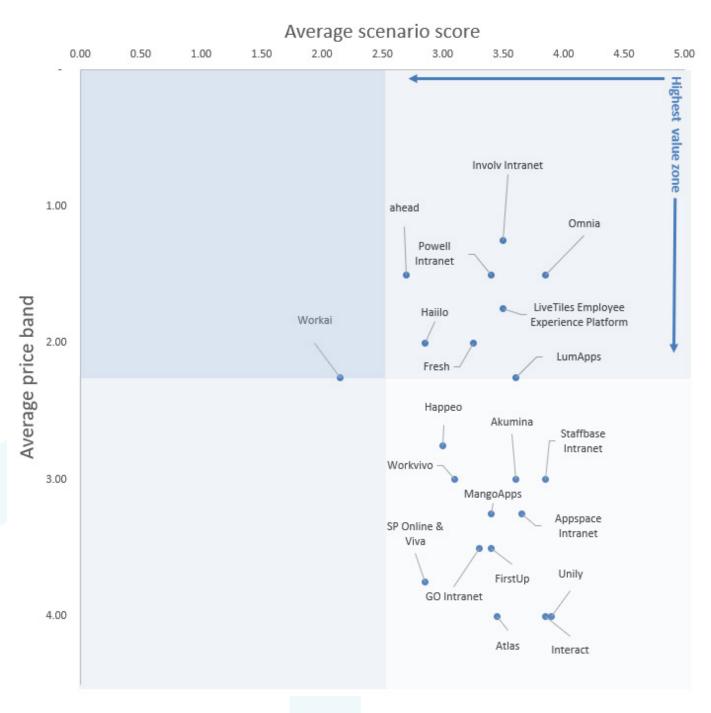
			PRODUCT	JCT COM	<b>COMPARISON SUMMARY</b>	N SUMM,	ARY			
	UX & VISUAL APPEAL	MOBILE AND FRONTLINE SUPPORT	INTERNAL COMMUNICATION	COMMUNITY & ENGAGEMENT	INFORMATION FINDING & KM	ADMIN EXPERIENCE AND GOVERNANCE	ANALYTICS	DIGITAL WORKPLACE INTEGRATION	M365 INTEGRATION	WILDCARE
ahead										
Akumina										
Appspace Intranet										
Atlas										
FirstUp										
Fresh										
GO Intranet										
Haiilo										
Наррео										
Interact										
Involv Intranet										
LiveTiles										
LumApps										
MangoApps										
Omnia										
Powell Intranet										
SharePoint & Viva										
Staffbase Intranet										
Unily										
Workai										
Workvivo										

= product score = potential score



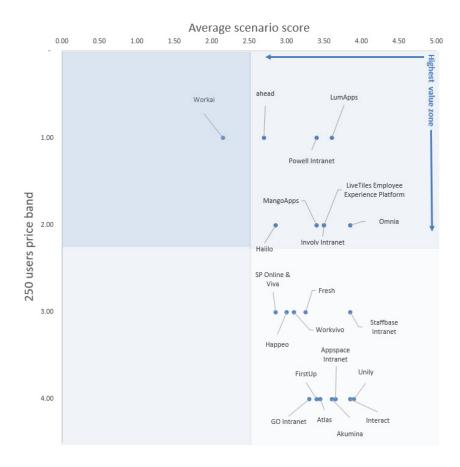
## **PRICE VS SCORE**

This chart shows average product scores in our scenarios against the overall average price band. It gives some idea of price-performance ratio, but the positions do vary according to the number of licenses involved. In general, we maintain that there's no 'best' intranet platform, and instead encourage buyers to consider what is the best match for them. Sometimes a welfeatured product is not worth the extra outlay unless you know those are features you'll need.



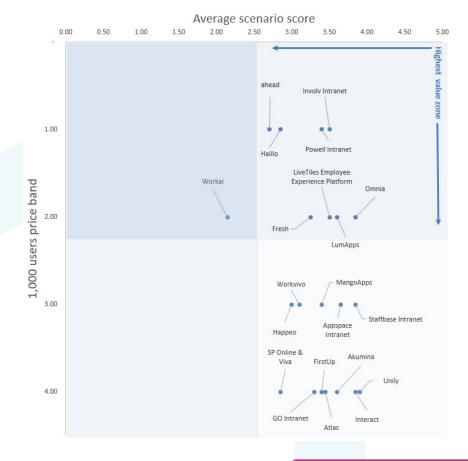
Products that appear in the top-right have the best price-performance ratio.





#### 250 users price band

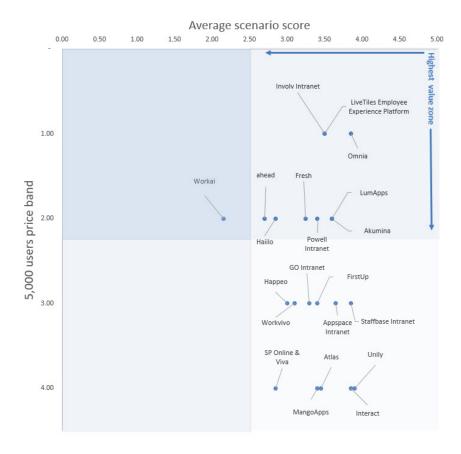
This chart shows the average scores against the price bands for 250 users. Use this chart if you belong to a smaller company to get a sense of the performance across the vendors.



#### 1,000 users price band

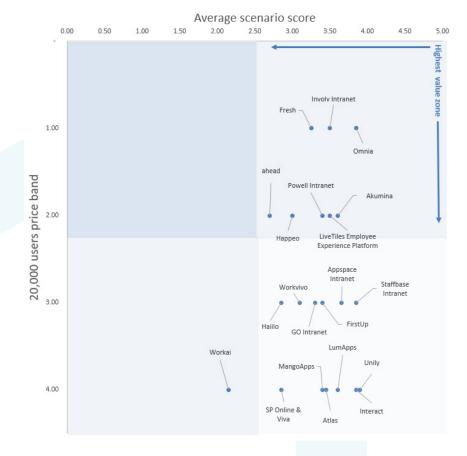
Small- to medium-sized businesses can use this chart to gauge the value of the products we've reviewed. The chart displays the average score and the price band for 1,000 users.





#### 5,000 users price band

This chart displays the average score with the price bands for 5,000 users. Medium to larger organisations can use this chart to get a feel for the value of each of the products we've reviewed.



#### 20,000 users price band

Enterprise scale businesses will find this chart helpful to get a sense of the value offered by the products we've reviewed. The chart shows the average scores and with price banding for 20,000 users.



			BASE S	YSTEMS	7		PRIC	E BAND	
PRODUCT	LOCATION	Fully Stand- alone		Optionally works with SharePoint	Other	250 users	1,000 users	5,000 users	20,000 users
ahead	+ 3	<b>✓</b>	×	<b>✓</b>	×	\$ \$ \$ \$	\$ \$ \$ \$	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$</b>
Akumina		×	×	<b>✓</b>	<b>/</b> **	<b>S S</b>	<b>S S</b>	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$</b>
Appspace Intranet		×	<b>✓</b>	×	×	<b>S S</b>	\$ <b>\$</b> \$	<b>\$ \$ \$</b>	\$ <b>\$ \$</b>
Atlas		×	<b>✓</b>	×	×	<b>S S</b>	<b>5 5</b>	<b>S S</b>	<b>S S</b>
Digital Assistant*		<b>✓</b>	×	<b>✓</b>	×	<b>\$ \$ \$</b>	<b>§ §</b>	<b>§ § §</b>	\$ <b>\$ \$</b>
FirstUp		<b>✓</b>	×	<b>✓</b>	×	<b>5 5 5</b>	<b>66</b>	<b>5 5 5</b>	<b>\$ \$ \$</b>
Fresh		×	<b>~</b>	×	×	<b>S S</b>	<b>\$ \$ \$</b>	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$ \$</b>
GO Intranet	I+I	×	<b>✓</b>	×	×	<b>S S</b>	<b>S S</b>	<b>\$ \$ \$</b>	\$ <b>\$ \$</b>
GreenOrbit*		<b>✓</b>	×	×	×	<b>\$ \$ \$</b>	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$</b>	<b>\$ \$ \$ \$</b>
Haiilo		<b>✓</b>	×	×	×	<b>\$ \$ \$</b>	\$ \$ \$ \$	\$ <b>\$ \$</b>	\$ \$ \$ \$
Наррео	+====	<b>✓</b>	×	<b>✓</b>	<b>/</b> **	<b>\$ \$ \$</b>	<b>\$ \$ \$</b>	<b>\$ \$ \$</b>	<b>\$ \$ \$</b>
Interact		×	×	<b>✓</b>	<b>/</b> **	<b>S S</b>	<b>S S</b>	<b>S S</b>	<b>S S</b>
Intranet Connections*	<b>*</b>	<b>✓</b>	×	×	×	<b>\$ \$ \$</b>	<b>\$ \$ \$</b>	×	×
Involv Intranet	<u> </u>	×	<b>✓</b>	×	×	<b>\$ \$ \$</b>	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$ \$</b>
JungleMail	-	×	×	<b>✓</b>	<b>/</b> **	\$ \$ \$ \$	\$ \$ \$ \$	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$</b>
Juno Intranet*	C·	×	<b>✓</b>	×	×	\$ \$ \$ \$	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$</b>
LiveTiles	+ •	<b>✓</b>	×	<b>✓</b>	×	<b>\$ \$ \$</b>	<b>\$ \$ \$</b>	\$ \$ \$ \$	<b>\$ \$ \$ \$</b>
LumApps		<b>✓</b>	×	<b>~</b>	<b>/</b> **	<b>\$ \$ \$ \$</b>	<b>5 5 5</b>	<b>\$ \$ \$ \$</b>	<b>S S</b>
MangoApps		<b>✓</b>	×	<b>✓</b>	×	<b>\$ \$ \$</b>	\$ <b>\$ \$</b>	<b>S S</b>	<b>S S S</b>
Oak Enterprise*		<b>✓</b>	×	<b>✓</b>	×	<b>\$ \$ \$</b>	\$ <b>\$ \$</b>	<b>\$ \$ \$</b>	<b>\$ \$ \$ \$</b>
Omnia	***************************************	×	<b>✓</b>	×	×	<b>\$ \$ \$</b>	<b>\$ \$ \$ \$</b>	\$ \$ \$ \$	\$ \$ \$ \$
Powell Intranet		×	<b>✓</b>	×	×	\$ \$ \$ \$	\$ \$ \$ \$	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$ \$</b>
Ripple + Beacon*		×	<b>✓</b>	×	×	<b>S S</b>	\$ <b>\$</b> \$	\$ \$ \$ \$	<b>\$ \$ \$ \$</b>
ShortPoint*		×	<b>✓</b>	×	×	\$ \$ \$ \$	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$ \$</b>
SharePoint & Viva		×	<b>✓</b>	×	×	<b>\$ \$ \$</b>	<b>6 6</b>	<b>6 6</b>	<b>S S</b>
Staffbase Intranet		✓	×	<b>✓</b>	×	<b>S S</b>	<b>5 5</b>	<b>§ § §</b>	<b>\$ \$ \$</b>
Unily		<b>✓</b>	×	×	×	<b>§ § §</b>	<b>66</b>	<b>66</b>	<b>S S</b>
Workai	_	✓	×	<b>✓</b>	×	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$</b>	<b>\$ \$ \$ \$</b>	<b>9 9</b>
Workvivo		<b>✓</b>	×	<b>✓</b>	×	<b>\$ \$ \$</b>	<b>\$ \$ \$</b>	<b>\$ \$ \$</b>	<b>S S</b>
Xoralia*		×	<b>✓</b>	×	×	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$ \$</b>	<b>\$ \$ \$</b>
* See 'Product Overviews' section	** See the review for details								

<sup>\*</sup> See 'Product Overviews' section

<sup>\*\*</sup> See the review for details

## WHO STOOD OUT: **INTRANET CHOICES 2023**

With so many intranet products to choose from it can be hard to know where to start. From the reviews featured in this report we have compiled an annual list of 'Intranet Choices' – products that we expect would often be on people's shortlists.

Our 2023 Choices are based on eight of our scenarios, where each provided products with a chance to stand out from the others to become a 'Choice' in that category. We looked at the highest scoring product(s) for each and have awarded the associated Choice badge. This means that some products are awarded several Choice badges, while others receive none.

Note though that we don't say that the Choices are the 'best' intranet products. There is no single 'best' intranet; there is only a product that is the best match for your needs, and you may need to read about several scenarios to understand what that means for you. We encourage potential buyers to do the groundwork on requirements and strategy first, so that you know exactly what you need rather than be swayed by impressive features. However, we appreciate that in a complex marketplace, some signposting can be helpful.







Staffbase has achieved the highest relative score in the most categories this year. It stands out in the areas surrounding user experience – across device types and different types of role, including admins who are often not well served in areas such as analytics.





Akumina is a highly flexible and feature-rich solution, where the integration options with business systems are among the best we've seen in our digital workplace integration scenario. The community and social capabilities are also very strong.





Internal Communicators will find a lot to like about Firstup, particularly the publishing, management and analytical features that make it outstanding in these areas.



35







Omnia goes above and beyond the standard SharePoint experience, building useful functionality on top of your Microsoft investment for both the user experience and information-finding.





Interact is a fully featured independent intranet solution, which provides a variety of tools through an excellent and highly attractive user interface.





For businesses that want to build a sense of community, MangoApps provides options to create a highly social space alongside some good practical tools too.





We were impressed by Unily's simple but highly effective internal communication tools, giving publishers a well-rounded set of features to communicate effectively.

Please see the reviews for details on each product and scenario.

# HOW WE EVALUATED

# The initial selection

There are more intranet products on the market than we've been able to cover in our report; you can see all the ones we're aware of in the <u>directory on our website</u>. We selected the products to feature based on prior knowledge of the best candidates. We also considered their presence in the market, which included our experience with client projects, and their installed user base.

We're able to offer this report for free because vendors have contributed to its production costs. The independence of our reviews is critical. In order to ensure that reviews are unbiased and independent, all vendors included have signed an agreement committing to these principles. We have also ensured that our review and editorial processes remain rigorous, with reviews and checks in place to preserve consistency and reduce any individual bias. If the scores seem generally good, it is because we didn't invite any vendors where we thought their product would perform poorly and not because we were lenient. Please also see the section on our 'vendor neutral' policy, below.

# Live demonstrations and sandbox

Each vendor was required to give a live demonstration of their product and show how it would fulfil the criteria in the evaluation scenarios (described in the previous section). We made sure that what was demonstrated was available to buy (not a pre-release beta). We asked whether what we were looking at were ready-made features or examples of customisation so that these could be reflected in the scoring.

Where possible, we also asked each vendor to give us access to a sandbox environment (including on mobile), so we could get a hands-on feel of how it works and take our own screenshots.

By using scenarios, we can make cross-product comparisons and not be led into focusing only on the things the vendors want to show us. The scenarios reflect real needs we have seen with our clients and are focused on business scenarios rather than technical specifications.

# Scenario evaluations

Each scenario could score a total of five points. If a better result could be achieved with additional product options or services, then we show this as an 'optional extra score' using one or more 'outline' score segments. To ensure consistency, each score was checked by three other reviewers and then all scores were reviewed together at the end.

Where on-premises and cloud versions of the product exist, we reviewed the cloud version and noted significant differences in the scoring comments table. Similarly, if vendors have multiple tiers of product, our review is based on the features included at the price band shown in the tables. Where a module or feature is an optional extra, we've done our best to indicate this, plus say whether it was included in the pricing we had been given.



The scenarios are not intended to cover everything an intranet might do, but to be a representative sample. If we missed any real areas of strength, then vendors had a final 'wildcard' option to demonstrate this.

The ten scenarios selected are:

- 1 User experience and visual appeal
- 2 Mobile and frontline support
- 3 Internal communication
- 4 Community and engagement
- 5 Information finding and knowledge management
- 6 Admin experience and governance
- 7 Analytics
- 8 Digital workplace integrations
- 9 Microsoft 365 integration
- 10 Wildcard

Each of these scenarios is covered in more detail in the preceding section.

# Voice of the customer

The idea of the 'voice of the customer' is to get some real-world feedback about what it is like to live with the product and work with the vendor.

Vendors were asked to encourage customers to contribute to our survey; we accepted a minimum of three responses, but the average was eight customer responses. Vendors didn't supply any text or take part in conversations, and submissions were verified with the customer. Secondly, we spoke to ClearBox's own contacts, where we knew they'd been using a product we reviewed. Thirdly, we put out a public appeal for feedback via a short survey. Responses are a combination of quotes from all three sources. We then edited them down into our own commentary, but the quotes have been taken directly from the feedback we were given.

Customers were asked:

- 1. What is best about the product?
- 2. What changes would you like to see?
- 3. How has your experience been of working with the vendor?

Of course, this is a small sample, and like any public reviews, readers should bear in mind that responses are likely to be skewed either by happy customers, or ones motivated to speak out because of a dissatisfaction. All the same, even happy customers tend to comment on what they would like to add to a product, and this in itself is revealing.



#### Vendor fact-check

Vendors were given the opportunity to correct any factual inaccuracies in their review, but not to influence scores or opinions. They also answered a questionnaire about the key features of the product, technical requirements, their client support model, and details on how the product can be launched within a business. This too was given a second check before going to press.

# **Product overviews**

Unfortunately, we aren't able to do in-depth reviews of all the products out there – the report would just become unwieldy. However, there are many good products out there that may well be the ideal match for your particular needs, and we don't want those to be overlooked. The Product Overviews section at the end of this report therefore contains shorter summaries of products, including a series of screenshots too. We still give a commentary, and in all cases have seen a demo, but we don't score them in-depth.

Products in this section tend to be newer, or ones that focus on a specific market, or perhaps aren't a full intranet solution but nevertheless do some components very well.

## The inevitable caveat and disclaimer

At the time of our reviews all details are accurate as far as we know. We asked vendors to check the details in our reviews but ultimately, they are independent write-ups with our own opinions on a 'best effort' basis. Vendors are working hard to improve these products and it may also be that details have changed by the time you read this, so please confirm any details with them before making a final purchasing decision.

In most cases screenshots have been provided by the vendors and are subject to copyright.

The opinions and information in this report is for guidance only. Any decision around acquiring software should be considered carefully with reference to your intranet strategy, organisational needs, risks, and technology landscape. In all cases we are not liable for purchasing decisions made based on the contents of this report.

Don't be afraid to ask us to help, we're always happy to have a no-obligation introductory chat.

# Our vendor neutral policy

As a consultancy, we think it is essential that we act with our clients' interests foremost, so ClearBox has a strict vendor-neutral policy. This means that we do not enter into any agreements with vendors that would bias our recommendations to clients. We don't sell any software or licenses.

This year, to allow us to offer the report for free to readers, we have asked vendors to cover our administrative costs. Hundreds of hours go into the production of this report, which we couldn't do without some sort of funding! However, we have only written the reviews we wanted to, and all our opinions (positive and negative) have remained in place. Our Choices selection is based on our findings, no vendor has paid to be awarded a badge.





# SELECTING THE RIGHT PRODUCT ADVISORY SERVICES FROM CLEARBOX

ClearBox can help you select the best-fit communication and digital experience product – considering desk-based and deskless workers.

Whether you would best be served by a single solution or distinct systems for different audiences, we'll show you the platforms and apps that suit your needs.



Discovery services as you need.



Strategic review to set the direction.



Understanding your requirements.

The resulting shortlist and our expert recommendations will guide you to the ideal solution.





# How to Choose a Product

We've presented you with a lot of information across our reviews and while some score higher than others, it doesn't mean those are the correct products for you.

In this section we've included some guidance about how you can use this report to select the right product for your business. We've provided guidance on how to consider whether it's better to choose to build, buy, work with SharePoint, or select an independent solution. We've also added a little information about ClearBox Consulting (so you know who we are and why we feel we can help with this report or with our services). We've also included our acknowledgements here so you can see who the reviewers are and what expertise they've brought to their reviews.



# USING THIS REPORT TO CHOOSE A PRODUCT

# **Choosing a product**

The target audience for this report is intranet managers, internal communicators, and IT teams that are looking to understand the options and draw up a shortlist of potential vendors.

As an outline process, we recommend that before you look at products you need to be clear on your intranet strategy and have a prioritised set of high-level requirements. Ideally, these will define a small number of scenarios in detail (to give vendors context) and avoid a long list of features to check off. Establish what the essential non-functional requirements are early on too: hosting, app deployment options, and language constraints might be non-negotiable. ClearBox offers consulting services for this if you need help.

Armed with these, use this report to shortlist vendors to speak to.



We recommend building a dialogue with vendors rather than going straight in with a formal procurement process. An informal demonstration will help you to get to know the company as well as the product and help to narrow your shortlist down to a final three or four. You'll get a much better response if you are open about this too.

The formal Request for Proposal (RFP) or Invitation to Tender (ITT) process can be very time-consuming, not just for vendors but for purchasers too (another reason to shortlist).

As a minimum, you should ask for a demonstration linked to your requirement scenarios. A demo site that can be tested with your intranet users would be much better. Some companies, where there are more complex needs, will go through a proof-of-concept stage. Vendors will typically expect payment for at least some of their costs in this instance.

Your final choice may not be one that scores highest overall in our report. The best value may be achieved by matching those who scored well on your priority scenarios and offer the right pricing, flexibility, and support too.

# Intranet strategy and requirements

Your intranet strategy needs to define the role of the intranet within the context of your whole digital workplace. What we mean by this is that there are multiple ways in which employee needs could be met for things like formal internal communication, team collaboration, access to services and so on. You need to decide which elements of these are best delivered by an intranet in your organisation and which will fall to other tools, such as Microsoft 365 applications, an employee app, or another business tool. It is an area that is getting trickier, and ClearBox often helps organisations define intranet and digital workplace strategies. Additionally, you can refer to our 'How to choose' guidance to help you identify your strategy and list of requirements from across the business.





Intranets only meet some digital workplace needs, and there may be multiple tools that would meet a requirement.

Prioritising requirements is essential. A simple MoSCoW (Must, Should, Could, Won't) notation is fine. Use anything that helps you focus on what is essential and what is a 'nice to have' so that you don't get swayed into buying a product that has an impressive feature list, but also a price tag for things you'll never get to use.

# Mobile and / or frontline worker requirements

As you explore your requirements you may discover that a strong mobile experience is essential for your organisation. We've explored what these products can do from a mobile perspective within a dedicated scenario. If you need to consider a mobile-first solution then there are additional solutions you can explore within our Mobile Apps for Employee Experience review report.



# Non-functional requirements

Technical and operational constraints ('non-functional requirements') matter too. They may include compatibility with other IT systems you're committed to, or the way in which your data is hosted.

The tables in each review will help you to eliminate vendors that don't meet your basic criteria, we've explained what you'll find in the 'Company and product tables explanation' section of this introduction. However, we would encourage you to be as stringent with non-functional requirements as you are with the functional ones and not to second-guess implementation details too much. We would therefore suggest discussing any 'missing' non-functional requirements with vendors to see if there are ways they can accommodate your needs. For example, 'must provide 24-hour support' might be on your list of requirements, but not present in some of the technical tables. The vendor may provide this level of support for urgent matters, or overall 24-hour support at additional cost, or not at all – it's worth discussing these sorts of things with them.

# Customisations and bespoke builds

You may want as much control as possible over the customisation of the intranet, or indeed have a bespoke-built site by the vendor. We have published a 'product type' scale for each, which will give you an indication of how ready-made or bespoke the product is. We've also included a similar scale for the level of available branding opportunities. Again, these are only an indication so please use this scale along with other information in the report to discuss your needs internally and then with the vendor.

# Choosing a vendor

Although we primarily focus on product features, the relationship you will have with the vendor is important. Sometimes compromising on features so you can work with somebody in your time zone can be a smart choice. There are notable clusters of vendors coming out of Australia, America, Canada, and Europe, but the value of having a relationship with a local supplier should not be under-estimated. Our summary tables indicate where vendors are based and the extent of their support and partnerships in other countries.

Some of the products or vendors have been around for several years, others are relatively new and evolving fast. The impact of this may not be so visible in the product per se but in how well the vendor has shifted from a project mindset to a product support one. Each review includes details on update processes, the company background, and their support arrangements.

Some intranet vendors also offer plenty of services, often included in the cost of the licenses – the pricing information will highlight where this is the case. Services include ongoing strategic thinking, tried-and-tested methodologies to launch the platform, or design services to get the look-and-feel of your site right. There is an overview of the services offered in the company product tables, but please also see the 'Voice of the customer' section in each review. Existing customers have shared their thoughts about working with the vendor, so you can get a real insight into what it's like being a client.



# A NEW INTRANET – BUILD OR BUY, SHAREPOINT, ADD-ON OR INDEPENDENT?

Given the prevalence of SharePoint licenses, we typically see four possible routes to creating a new intranet:



Use standard SharePoint, lightly adapted with branding and configuration Use SharePoint with an add-on product (see the ones listed in the technical table) Buy an independent intranet platform and configure / extend it (see the ones listed in the technical table)

Build your own using a CMS or SharePoint as the basis, requiring extensive specification and development.

When clients engage ClearBox services to help chose an intranet platform, or do discovery work, there's often a presumption that the solution will be SharePoint-based because they already have Microsoft 365. Some feel there's no decision to be made as modern SharePoint alone is more than capable of whatever the requirements reveal.

However, this decision is not as clear-cut as it first appears, and we often encourage clients to think more broadly about what matters most to them. Virtually all the products we list in this report will integrate SharePoint document libraries with the intranet experience, for example. The ability to work across an intranet and collaborative content can be over-weighted too; users can sometimes be worried if they search the 'open' intranet and see results including 'their' documents, for example.

Whichever route you take, the advice in the previous section 'Using this report to choose a product' still applies, as creating a strategy, identifying requirements, and exploring your options are sensible no matter what your starting preference.

# The case for basing your intranet on SharePoint

1

You already have it. We're going to assume that many reading this already have Microsoft 365 as a start point, and that this has been chosen for many reasons beyond the intranet such as Exchange, Teams, Active Directory and so on. So long as all users are already licensed, there's a big win in not having to make the case for more budget.

2

SharePoint is a strong contender for straightforward intranets.

If you just want one simple site, or many similar sites with central hub, then it is easy to get going with SharePoint. The interface for site building and publishing are attractive and learnable.

3

Integrated search. This is often seen as a core argument for SharePoint or a SharePoint add-on: all your content stays within Microsoft 365, so there's no overhead of search integrations across intranet and collaborative content in a document or in Teams conversations.





Integration across other parts of Microsoft 365. If you buy into Microsoft's vision, then a modern digital workplace spans SharePoint, Teams, the Power Platform and more. The 'intranet' is secondary and having these work well together is more than the sum of the parts.



A single supplier to deal with. IT teams can be reluctant to set up more supplier relationships. Even if you choose a SharePoint add-on product, the vendor may still be a Microsoft Partner and within the same ecosystem. For similar reasons, there's a large marketplace of skilled contractors too.



Add on products expand capabilities while keeping the benefits. If you need more power, then the SharePoint add-on products we list will greatly enhance the functionality whilst keeping the appeal of single search, integration with Teams, OneDrive, Yammer etc.

# The case for choosing an independent (non-SharePoint) platform

1

Flexibility. It's hard to deviate from the SharePoint look even with an add-on product (though some do a commendable job). However, independent products can provide broader options and the flexibility to get it looking exactly as you want.

2

Cost of ownership. Although the licenses might be 'free', configuring SharePoint requires specialist knowledge that is in-demand. Some of the addon products do a good job of simplifying the interface for admin tasks but add complexity elsewhere. In the long run, it can be cheaper to buy an independent intranet product closer to your needs than adapt SharePoint to do it.

3

Easier to live with.

Independent intranets tend to have a more straightforward admin interface and coherent set of options. Done well, an independent intranet can evolve more readily as non-technical users are able to manage it themselves and find it easier to add content.

4

Integrations. SharePoint ina-box products tend to offer better integrations with M365 tools. However, independents are better at integrating with non-SharePoint cloud storage and tend to be better at offering open APIs or marketplaces for further development (which could of course include Microsoft applications). 5

Quicker deployment. It can be much quicker to go from project start to launch with an independent intranet product, though many of the add-on tools do a good job of shortening this phase for SharePoint too. 6

Frontline and Mobile experience. We're not too keen on SharePoint current mobile experience, particularly for frontline workers. You'll find more options, and a more mature approach with independent vendors, some of which began as mobile-first platforms.

# The case for building your own

Over the last five years, we have seen fewer organisations opting to build their own intranet. The technical maintenance burden can be significant (or maintenance doesn't happen because the developers are no longer available). Specifying requirements from a blank page is much more complex than choosing a product off-the-shelf, and the time between project start and go-live can easily fill 18 months or more. However, there are still some points to consider:

1

#### Flexibility and ambition.

Building your own means that you can have just what you want. If you have a vision for something really innovative, or specific to how your business works, then there may be nothing off the shelf that fits. Quite a few intranet products began as in-house projects that were so good they spun off into companies.

2

Cost. For very large organisations, the cost of intranet products can be off-putting, especially on a per user/per month model when there may be 20,000 or more frontline workers to pay for. Build your own costs scale very well, and you may already have a license for the base CMS if it is used for your website.

3

Iteration. Some of the best intranets we've seen have a team behind them that constantly improve both the functionality and the content. Although you can do this with independent or SharePoint-based intranets too, there are more constraints on the modifications that will be supported, or you may have to wait a year or more for the feature to get on the vendor's roadmap.



# ABOUT CLEARBOX CONSULTING



# Who we are

Based in the UK but with clients around the world, ClearBox Consulting Ltd. is a specialist independent consultancy that believes in making the workplace a better and more productive experience. Our goal is to help organisations collaborate and communicate more effectively.

Since 2007, we have been helping organisations of all sizes improve their intranets and wider digital workplace. We cover digital internal communications, social media, knowledge management, and collaboration tools. We understand technology, but we approach it from the people side first.

ClearBox is run by Sam Marshall, together with a specialist team and a wider network of associates that can be introduced as needed. We all have hands-on experience of the realities of introducing change in organisations.

## What we do

We bring clarity to digital workplaces. Often our clients want to reinvigorate their intranets or introduce more collaborative ways of working. We help them develop and implement a strategy that supports their business goals, but which also understands employee needs.

What makes us different is that all our consultants have first-hand experience of managing digital workplaces, so we're not just about the theory. Collectively we've worked on over 200 intranets, so we can help you plan effectively and anticipate any challenges.

We are also technology and vendor neutral: we don't implement any specific tools or get fees for recommending them. That means we help our clients make choices with their business needs in mind.

# Consulting for intranet product selection

If you need further help to choose the right product for your digital workplace, then we can apply our extensive knowledge of the marketplace to meet your specific needs. Our consulting help can range from:

- · A telephone virtual advisory call if you want to sense-check your decision
- A one-day workshop to review requirements and explore options
- Detailed requirements discovery from stakeholders, employees, and partners and then our recommendations on a shortlist
- Support for an end-to-end vendor selection process, from drafting a Request for Proposal though to vendor interviews and final selection.





# Our other services

- Intranet and digital workplace discovery and strategy consulting to directly support organisation goals
- SharePoint and Microsoft 365 strategy, governance and adoption
- Training on 'writing for your intranet' for content creators
- · Information Architecture
- Intranet design and usability
- · A 'one week intranet review' to create a prioritised plan for incremental improvements

# Who we work with

We work with organisations that range from a few hundred employees to over 100,000, typically as partners to Communications, IT and HR functions. Our assignments have included projects with both profit and non-profit sectors, including Bayer, Diageo, GSK, Marie Curie, Ofgem, Skanska, Royal British Legion, Sony, Loves Travel Stops, Unilever Vodafone, Electrolux and Scottish Government.









































Nordea













#### ClearBox Consulting Ltd.

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# **ACKNOWLEDGEMENTS**

# Report Manager and Lead Reviewer



**Suzie Robinson** is an intranet and digital employee experience consultant at ClearBox and has responsibility for this report.

Suzie has worked with intranets since 2008 and has practical experience with all aspects of an intranet lifecycle, from research, to implementation, to ongoing governance, and overall strategy. Suzie's intranet experience has grown out of the roots of internal communication, so she has a focus on employee experience and engagement, plus strong content. Remote and difficult to reach users were often the core user-base for the intranets Suzie managed, so she has extensive experience at finding ways to engage and connect a broad audience range.

Suzie is a skilled writer (not just of reviews, she's also a published author) and editor, and she is active in the internal communications community, both writing and getting up to speak at conferences. Suzie is always happy to have a chat over social media, so please feel free to follow her on Twitter (as @SuzieRobinson42) or on LinkedIn.

# **Report Executive Director**



**Sam Marshall** is the owner of ClearBox Consulting and has specialised in intranets and the digital workplace for over 20 years, working with companies such as Bayer, Vodafone, Diageo, UK Government, Sony, FIFA and GSK.

His current activities focus on intranet and digital workplace strategy, and the business side of Microsoft 365.

He is a regular keynote speaker at international conferences and has been named a 'Contributor of the year' for his CMSWire column seven years in a row. In 2015 Sam was given the Intranet Now award for 'remarkable contribution to the intranet community'. Follow him on @sammarshall



## Reviewers



Agnes Molnar, founder and managing consultant of Search Explained, has over a decade of experience helping organisations reap the maximum benefits of enterprise search. In addition to planning and implementing an internal search strategy, you can count on her to educate you and your team on how to take full advantage of it. She is passionate about helping companies become more productive and efficient so they can succeed in today's increasingly competitive world. Agnes is a founding member of The Search Network, a global community of independent search professionals, and a contributor to the annual report, Search Insights. She's a Microsoft Regional Director and has been awarded a Most Valuable Professional (MVP) by Microsoft every year since 2008. She's a regular speaker at various events, conferences, and workshops around the globe.



Allan Tanner is a digital management professional with over 22 years' experience in digital services. He has worked in public, private and third sectors delivering digital workplace programmes and corporate intranet projects for the likes of Abrdn plc, Citizens Advice Scotland, and Forestry and Land Scotland. He believes in using technology to make work simpler and more productive and, with many years based in communications teams, knows the role effective communication plays in helping employees make sense of their digital landscape. You can connect with Allan on Twitter @weesandy.



**Andrew Marr** is an intranet and digital workplace consultant at ClearBox, having over 15 years' experience in digital business strategy and management practice. He has completed a wide range of digital workplace strategy, intranet management and technology vendor selection assignments for world-leading brands and government organisations. Coming from a practitioner background, Andrew was responsible for intranet strategy and development at international healthcare group Bupa and implemented pioneering social and collaboration applications during his time there.



**Guy Van Leemput** is an independent intranet and digital workplace consultant based in Brussels. He has extensive intranet experience as a corporate intranet manager at financial network provider SWIFT and as an independent consultant to large and mid-sized organisations in the Benelux countries. Guy is the founder of ValueIntranet, helping organisations to create measurable value with their intranet and digital workplace projects.



**Lisa Riemers** is an independent communications, content, and digital workplace consultant, with over 15 years of experience helping organisations tell their stories. She's worked as an in-house intranet manager, product owner and marketer, and bridges the gap between comms, digital and technology teams. She works with large organisations like the UK government (Department for International Trade), G4S, Veolia, FirstGroup, British Red Cross and Direct Line Group. Lisa loves connecting people. She builds communities online and offline and co-runs the Intranet Now conference. She's also an artist, who brings her creative flair to the workplace. Connect with Lisa on Twitter @lisariemers.





Rebecca Jackson is a digital workplace and employee experience consultant who has been working at the intersection of people and technology since 2009. In that time, she has been the product owner and manager of numerous intranets, enterprise social platforms, unified communication solutions and business applications, always advocating a people-centric approach. Rebecca is active in the technology community as a blogger, presenter, panelist, mentor and is a three-times Microsoft MVP (M365 Apps & Services). She's also passionate about Inclusion and Diversity, is pursuing studies in Organisational Psychology and has a love for sketching which she frequently brings into her work. Connect with Rebecca on Twitter @RebeccaJLJ.

# **Report Editing**



**Steve Bynghall** is an independent digital workplace and intranet consultant and writer. Steve works independently as well as through consultancies such as the Digital Workplace Group and Step Two. He has written extensively through blogs, articles and books. Steve co-founded Spark Trajectory, a company offering training and consulting for digital workplace teams.

Following an MSc in Information Science from City University, Steve worked at accounting firm BDO LLP for over thirteen years, working in various knowledge roles including managing the firm's global extranet programme. He has been freelance since 2010. Connect with Steve on Twitter at <a href="mailto:abynghall">abynghall</a>.

# **Report Design**



**Debbie Brown** is an experienced freelance designer with a Bachelor of Arts Degree. She has 18 years of experience working on a broad range of design disciplines including: publication design, advertising for print and online, logo creation, branding design, homepage concept / UI design. To see a selection of her work view her portfolio and follow her on LinkedIn.

# Vendors

We are grateful to each vendor for their co-operation in demonstrating their products to us. The products we feature are a combination of companies we approached and ones that asked to be involved in this edition. If you're the vendor of a product and would like to be included in the next version of this report, please visit our website for details.



# BECOME A CLEARBOX REVIEWER

We're always looking for more people to join our team of reviewers for our reports. ClearBox is only a small consultancy firm, and we need support from critically minded, passionate writers to help us cover the breadth of products we feature in our reports.

# What being a reviewer involves

Each of our reviews takes a few days in total to complete. This includes writing, responding to editing recommendations, and sharing with your vendors. During a demo we expect you to be able to identify the great (and less great) features of the products you see. Afterwards you need to be able to express your thoughts cohesively and coherently – while we want to

know what something does, it's more important to express how well it does it.

We fact-check everything with vendors, so managing that relationship and related conversations is also important. Of course, we also need people who can meet deadlines so that we can keep pushing towards launch.

"I've been a ClearBox reviewer for several years now and I find the experience enriching and rewarding. It's a great way to learn about new products and new trends in a rapidly evolving market. I also enjoy being part of an international team of experts that produces one of the industry's most significant reports."

Guy Van Leemput, Intranet and Digital Workplace Consultant

# How we support you

We assign each product to a reviewer, so you and the vendor have a consistent experience. We template everything, provide guidance, offer a training session at the start of the process, and will shadow you through your first reviews. We're always on hand to answer questions too, and we welcome queries as they may help the wider reviewing team.

We pay for your time, of course, and you gain the benefit of experience of a variety of platforms during the process.

# What to do

Have a read through of this report and our report on Mobile Apps for Employee Engagement, which is also available for free. If you find the type of content interesting and think, "Yeah, I could write that," then please get in touch with me. You're welcome to DM me via LinkedIn or email me instead (suzie@clearbox.co.uk).

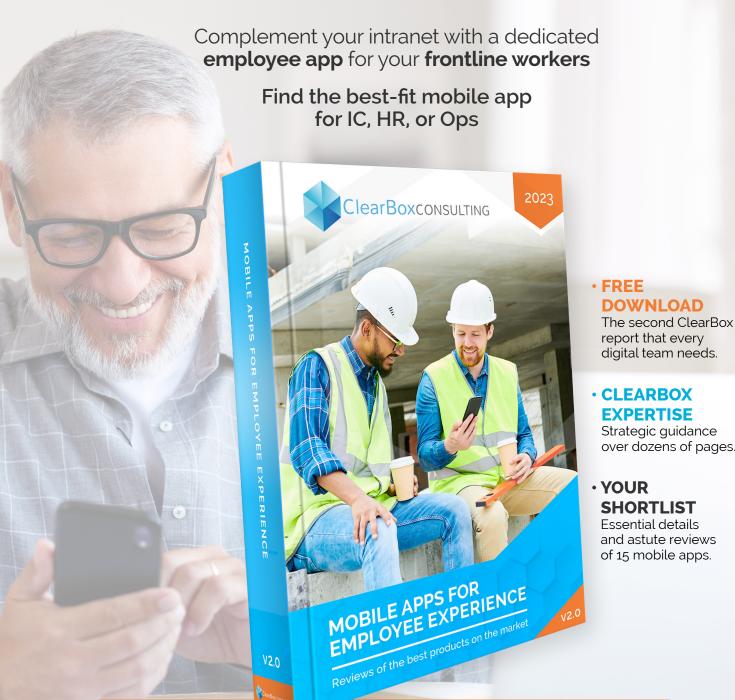
I'm really proud of the reports we produce, particularly as we've been able to release the latest for free. The vendors who take part appreciate the level of detail we go into, and our reviewers get a huge amount of insight into the industry. It's a lot of work, but it's extremely rewarding and benefits the digital workplace industry as a whole.

Suzie Robinson, Report Manager





# **HOW TO ENHANCE THE MOBILE EXPERIENCE**



over dozens of pages.

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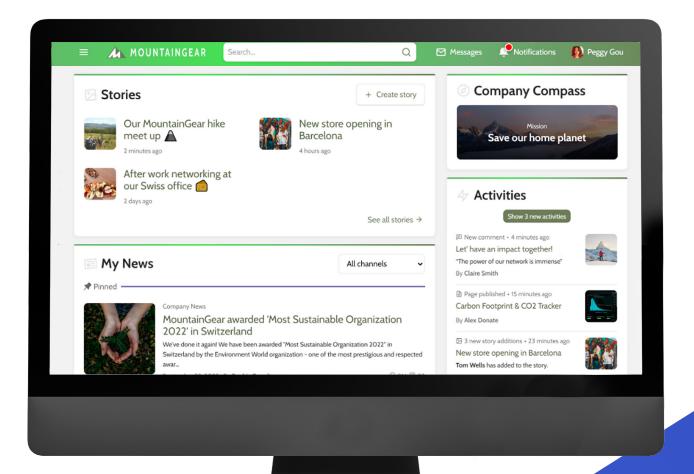




SECTION TWO

FULL REVIEWS

# ahead



# Our view in one tweet

@aheadIntranet combines an impressively usable interface with consumer appstyle features in a very mobile-friendly communications tool.



# ahead owned by ahead AG

ahead AG is a relatively young company, having been founded in 2020, though the inception of its product dates back to 2018. It's headquartered in Bern, Switzerland, with additional locations in Germany and Spain.

One of the stand-out features of ahead is its usability. The fact that the product is functionally identical on desktop and mobile means that users enjoy a parity of experience no matter which device they employ, ahead is primarily a communications and engagement tool, and user generated content is placed in the foreground through a 'Stories' feature. Users have plenty of options to engage with each other through social reactions, too.

While content creation is simple on ahead, the tool is not particularly suited to providing large amounts of structured information requiring deep navigation. There is also a lack of flexibility around how content can be laid out or promoted on the home page. Good quality Active Directory (AD) data is fundamental to being able to manage authentication, user permissions and target audiences effectively.

With strong multilingual capabilities, ahead will suit small to medium-sized companies with a dispersed workforce who are looking for a communications tool for desk-based and deskless users. The price point makes it an attractive proposition too.



# Summary table of scenario scores

# NO. SCENARIO/SCORE User experience and visual appeal 2 Mobile and frontline support Internal communication 3 Community and engagement 4 Information finding and knowledge management 5 6 Admin experience and governance **Analytics** 7 Digital workplace integrations Microsoft 365 integration 9 10 Wildcard

# **Pricing**

PRICE BAND	
250 users	\$\$\$\$
1,000 users	\$\$\$\$
5,000 users	\$ \$ \$
20,000 users	\$ \$ \$

#### **PRICING MODEL**

Subscription – price per user per month, subscription – price band based on number of users, FTE based pricing options for industries with a high amount of part time employees.

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, government / public sector, frontline users, multi-year commitments, businesses over 20,000 users.

Price includes: Project workshops, training for admins, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, hosting, onboarding user data, access to a community & webinars, consulting services, access pass to ahead offices and community event

# Key benefits

- ahead provides an eminently usable interface particularly well-suited for use on mobile, with plenty of opportunities for users to interact with each other and engage with content.
- Creating content is simple and quick, even on mobile, with a field-and-component-based publishing tool providing consistency in layout and design.
- 'Stories' are an ideal way to encourage user-generated content and colleague interactions.
- The 'company compass' is a novel way to make company values and vision visible to all employees.
- · Multilingual options are well thought-out and integral to content publishing.

# Improvements and considerations

- ahead doesn't score well for its analytics, though is by no means the only product in the report that could improve in this area.
- While page creation is straightforward, the approach to content structuring doesn't lend itself to creating large sections with deep navigation.
- The product has good flexibility in how Active Directory (AD) data can be used to provide targeted content, however, the dependency on maintaining AD data to use ahead's functionality to best effect may be too restrictive for some.



# **Product type**



# Branding opportunities

Good branding, complex options

# Target businesses



**SMALL** less than 1,000 people



MEDIUM

1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems









Fully standalone

Requires SharePoint Optionally works with SharePoint

Other

# **Sectors**











Engineering and manufacturing

Property and construction

Science and pharmaceuticals

Transport and logistics

Retail

# You may also be interested in...





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59

# **COMPANY AND PRODUCT**

# Company details



# Company

ahead AG



#### Company founded

2020



#### Company locations

Bern, Switzerland (HQ), Spain



ISO 27001 certified

No



#### Typical client size

1,000 - 5,000 employees



# Largest deployment so far

24,000 employees, 18 countries



#### Partner locations

Switzerland, Germany, Austria, Switzerland, Spain



#### Customers

Clients include: Roca, Ronal group, Medartis, Läderach, Vebego, Salvation Army Switzerland, Carhartt, Brugg Group

# Product and technical details

Name of product	ahead
Product launched	2018
Current version	ahead is an evergreen SaaS solution with weekly / monthly updates
Accessibility	Contrast can be set by the individual user, individual users can change the font size of what they're seeing, keyboards can be used for navigation.



#### Deployment

Client onpremises

Client private cloud

Microsoft Azure Amazon Web Services

Vendorhosted Microsoft 365 tenant

Other

#### Data residency

EU and Switzerland

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active Directory

**ADFS** 

Open ID

Oauth

G Suite

Other

#### Search technology

Apache Lucene/ Solr

Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

# Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

## SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

## Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other



#### **Reverse-out options**

All content data can be retrieved by the customer. Documents remain in SharePoint (no-replication).

#### Languages supported

All European languages plus Asian languages supported (30 plus).

#### Machine translation

Yes - via the product

#### Right to left script

On request

# Set-up and support

#### Set-up process for new clients

ahead is a pure SaaS product. Integration into the customer's Office 365 environment comes with the product and can be enabled with one click, with no installation necessary, ahead includes guided onboarding for set-up that personalises the intranet. Tools and best practices are shared using a dedicated customer onboarding portal. Additional onboarding professional services can be purchased upon request.

#### **Product updates**

Updates are weekly / monthly throughout the year.

#### Product update process

All customers are updated at once. If a new release includes major changes ahead will inform its customers and provide a preview of the new version, including training material if needed.

## Technical support

Support is provided via ticketing system, email and phone support across all time zones. Support times are provided during office hours during the Central European time zone. Additional support coverage is provided at additional cost and upon request.

## User community

ahead has an active ahead X community with regular webinars, product updates and a user conferences.



## In their own words

ahead says: "ahead is the digital home that connects your global team. ahead is the simplest—yet powerful—and easiest to launch internal communications platform that allows your entire workforce to stay informed, engaged and inspired wherever they are. Internal communicators and employees love using ahead."

# Their view of the marketplace

ahead says: "80% of the global workforce are not sitting at a desk and do not have access to important company information. ahead is the ideal platform to reach all non-desk workers while keeping the company's mission and core values at the center of internal communications. This provides the foundation to successfully navigate any organisation through the digital transformation."

# Voice of the customer

ahead's simplicity is one if its main attractions to its customers and many of them cited it. "Simple, easy to use" was a typical comment, with one user saying, "intuitive and straightforward to use", and another highlighting "what we like the most about the product is that it is user friendly in both directions...[for] the final user and the editor". Customers called out ahead's effectiveness in helping employee engagement, with one emphasising the potential to reach deskless workers with varying language requirements, commenting, "ahead gives us the opportunity to address all of our employees...[including] employees who work in the operation (blue-collar workers). They only have private cell phones and mostly no computers. With ahead it is possible to reach them... and in many different languages".

Customers are generally happy with the options available to them. Better customisation options on the home page and with images were two areas noted for improvement, with an undercurrent of more flexibility on layout overall being desired. Comments included "more options for using pictures [and a] customisable home screen" and "more layouting flexibility", with another saying they'd like "proper templates for news". One further noted simply, "better MS Teams integration".

In terms of working with the vendor, client feedback was overwhelmingly positive, with customers highlighting the vendor's responsiveness and willingness to listen to ideas and requirements. "Very good", "excellent" and "very positive" were common responses. One customer said, "right from the start we felt we were in good hands and very well looked after". Another commented, "the cooperation, and understanding of our organisation was exceptional at all times". However, one customer expressed that they would like better overall transparency in costs, including support and maintenance.



+ Create story





Our MountainGear hike meet up

2 minutes ago



New store opening in Barcelona

4 hours ago



After work networking at our Swiss office

2 days ago

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All channels

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Company News

# MountainGear awarded 'Most Sustainable Organization 2022' in Switzerland

We've done it again! We have been awarded "Most Sustainable Organization 2022" in Switzerland by the Environment World organization - one of the most prestigious and respected awar...

September 23, 2022 By Sophia Brandt

◎ 314 🗏 83



Products

#### New Collection: MountainGear Fall/Winter 2023

We are welcoming the new Fall/Winter MountainGear Collection a Dear all, Summer is officially over when we launch our newest products for the Fall/Winter collection. We're very ex...

October 9, 2022 By Hannah Brown

③ 3 min | ⊕ 76 🖾 21



Company News

#### New Referral Program: MountainGear Talent Explorers

Unleash the power of your network and help us grow! I'm happy to announce the launch of our new referral program, which aims at helping us grow our MountainGear family by tapping i...

October 6, 2022 By Sophia Brandt

⊕ 55 🗏 14



Events

#### • Save the date: MountainGear Meet-up POLL

Our next meet-up is coming up! Dear teams, Networking and socializing is a big part of what makes our

Our next meet-up is coming up! Dear teams, Networking and socializing is a big part of what makes our culture here at MontainGear so great. That's why we are again organising a...

September 28, 2022 By Alicia Morris

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HR News

#### We've updated our Employee Handbook MANDATORY READING

Dear MountainGeers, In our Employee Satisfaction Survey this summer, many of you said you'd like to see more clarity in our business rules, especially in regard to flexibility and...

September 28, 2022 By Sophia Brandt

③ 1 min | ⊕ 130 | ■ 29



#### Calling all photography enthusiasts!

Are you a lover of the outdoors, and love to capture the moment through photography? We need you! In our upcoming Q4 social media campaign we'd like to share impressions from our  $M_{\rm m}$ .

September 26, 2022 By Steve Knox

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Company News

#### Introducing Our Athletes POLL

Our Athletes - MountainGear Ambassadors. Our Mission at MountainGear has always been to "bring inspiration to the modern explorer". Together we strive to do everything possible to...

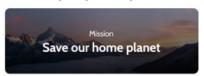
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## Company Compass



#### 4 Activities

Show 3 new activities

□ New comment • 4 minutes ago
 Let' have an impact together!
 The power of our network is immense\*
 By Claire Smith



Page published • 15 minutes ago
Carbon Footprint & CO2 Tracker

By Alex Donate



☑ 3 new story additions • 23 minutes ago New store opening in Barcelona Tom Wells has added to the story.



- Last seen -

Salesforce • an hour ago

Kurz AG opportunity has moved to proposal stage



Check out the opportunity

Page updated ⋅ 3 hours ago
 Materials & Composites

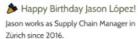
Materials made from two or more different materials that, when combined, are strong...

By Alex Donate

#### Today's forecast for Barcelona

Light rain starting in the afternoon. Maximum temperature: 17.37°

₫ Birthday • 5 hours ago





Instagram 
 · 13 hours ago

Today we launch our latest footwear for snow lovers. Our ST500 Summit Boots



scombine top technology with traditional handcrafting, #hiking #mountain

By MountainGear Social

Poll has ended • 17 hours ago

How will you join the event?

Check out the result

➤ Travel • 2 days ago

30 Great Deals at REI's Gear Up Get Out Sale 2022



REI shuts their doors every year on Black Friday to encourage everyone to #optoutside, but first they're having their annual Gear Up Get Out sale from Nov. 11-21.

○ ServiceNow • 2 days ago

Retirement Procedures

New knowledge article published



Load more...

# **REVIEW**

# 1. User experience and visual appeal

SCORE 3.5

ahead is a communications-focused product offering a consistent experience regardless of user device. The home page user interface (ahead prefers 'start page') presents as a simple two-column format on desktop and a single, scrollable list on mobile. It's clear attention has been paid to usability, with content creation a particularly smooth experience on both desktop and mobile.

User-generated content sits at the top with a clear call to action inviting users to contribute 'Stories'. The News section, which is a discrete block of content, can be configured to sit above Stories if preferred. The Company Compass, which we cover in detail in Scenario 10, is deliberately prominent, and an activities feed that can contain both internal and external content completes the design. See the Highlights section for more information on the feed. The focus is on short, digestible, scrollable content but with labels added where appropriate to catch the user's attention for elements such as mandatory reads.

The site is generally easy to move around, however, deeper navigation suffers a little in terms of execution. Beyond the mega menu (accessible via a burger icon) there are only two further tiers of navigation. Slightly against convention, sub-navigation is presented in a right-hand column on desktop, and at the foot of the page on mobile, linked via anchor at the page top. There's a breadcrumb trail but overall, this isn't a product for creating an extensive information architecture.

Notifications are found at the top of the page. Users can toggle between the main items and any mandatory reads; these are cleared from the list once acknowledged, with general notifications remaining for 14 days in chronological order. There's no option to filter for read / unread items. Search and 'Messaging' sit in the top bar. Messaging is a paid-for option (although included in the price provided for this review) providing one-to-one or group chat, and we cover this in detail in the Highlights.

ahead offers four customisable design options: colour scheme, logo, fonts and corner rounding. We like the approach to this as it's simple but effective, please see the Highlights for details.

# 2. Mobile and frontline support

SCORE 3.5

The ahead app is downloadable through the app stores for iOS and Android and there's an option to push it out through an MDM wrapper. A white label version is available at additional cost; the vendor highlights that on initial installation this carries the ahead branding but will switch to company branding thereafter. Additionally, the mobile URL can be changed to a preferred domain.

Access to the app is via QR code, generally distributed offline, such as on posters or through team leaders. When the code is scanned, the user lands on a web page providing



context for using the app, including reassurance where it is being downloaded onto a personal device. Additionally, the page provides instructions for getting started with the app and is available in multiple languages. This initial experience is unusual in the market and is very good for end users.

Authentication is exclusively via Azure Active Directory (AAD). The vendor highlights it's possible to create an AD account solely for authentication, meaning Microsoft licences aren't needed for this purpose. However, there's no ability to add users in an ad hoc way through the admin system, all user access and permissions must be set through AD. This is a more restrictive approach than we have seen in other products.

The mobile user experience on ahead is excellent. Functionality is wholly identical to the desktop site, including search; in ahead's case this isn't an issue as the site navigation is simple enough already. However, we think admins should be given the option to replace the home page with the activities feed as this lends itself so well to mobile. Additionally, it's not hard to see mobile as the default option for many users, even site admins, as the interface is impressively usable. Publishing is easy, supporting the emphasis on user-generated 'Stories' as a key content element particularly suited to mobile. For example, users could grab an image or video to post to the site in a way that couldn't easily be done on desktop.

The messaging feature has a potentially strong use case on mobile for frontline workers and is worth considering (please see the Highlights). Note that there isn't a document viewer in the app, files will open either in their native application, or in a browser. Push notifications will be provided if the user has enabled them.

# 3. Internal communication

SCORE

Content creation is appealingly simple on ahead and is principally set up using components called 'building blocks'. The blocks provide options for adding content including video, polls, contacts, and links to other pages via 'cards'. Content can be previewed and be kept in draft until ready for publication. Published articles are simple but attractive; please see the Highlights for details.

Key settings and metadata are added through fields on the page. Authors may publish as another user and choose the channel or site section the content lives in. Audiences are associated with channels and sections, can be assigned to pages, and are based on Active Directory (AD) groups. However, an advanced audience targeting option (included in the price provided here) can make use of user attributes in AD, as well as existing AD groups, to create bespoke audiences. For example, users in Denmark, Norway, Finland and Sweden AD groups could be brought together as a single 'Nordics' audience. Notwithstanding this flexibility, the reliance on AD means targeting options are more limited here than in other products we've seen. There's an option to make content private to the audience, as it is otherwise findable by all users.

There are few opportunities for promoting content on the start page. Items can be pinned to the top of the news section and editors can set the pin duration. As there's no limit on the number of pinned items, some management might be needed to ensure other items don't lose visibility. In articles or Stories, publishers can easily associate related content, and alert users who have permission to view the content through a site notification, mobile push notification, an MS Teams notification, or via email. Users can't set their own notification preferences, so governance here will be important. Mandatory read content is simple to configure and is flagged prominently next to article titles, as well as having its own tab in the notifications panel.

Articles and pages can be pushed live instantly or scheduled. While there isn't any publishing workflow, there's an overview for admins showing all content in draft, published, scheduled, or archived. There are some handy features here, such as cloning a page with a single click.



ahead has an API available to publish content to digital signage solutions. Note this is used directly in the solution, rather than presented through a browser. Multiple streams can be set up to target specific screens.

# 4. Community and engagement

# score 3

ahead has only a handful of community and engagement features, however, they are simple and effective. The main community feature is 'Stories', user-generated snapshot content items intended to drive colleague-led engagement. A Story can be added to over time; by default Story duration is set at four days, although this is configurable, and the intention is to encourage users to return to continue interacting with the Story and each other. While the feature encourages all

Stories are well-suited to mobile users, they are very quick to set up and a user can use the camera on their device to take and post images or videos. We like the option for the author to 'add a thought' (a brief, styled text panel) into the Story as an additional contribution. As with other content, there's the option to associate a Story with the Company Compass, and the Compass itself (covered in Scenario 10) could potentially be used in a supporting role for community-type content. Moderation options are notable by their absence; a user is able to use @mentions to report inappropriate content to admins, however, a simple 'report to admin' feature would be a sensible addition here.

employees to contribute, admins have control over whether publishing is available for everyone.

Social reactions and commenting are available on all content throughout ahead. There is the set of like, love, laugh, cry reactions, which is a welcome feature. Commenting and replies are possible, including amentions that generate a notification.

ahead offer polls as a feature within News items (but not in Stories, where we think they would work equally well). A 'poll' badge will show next to the article title on the start page when one has been added. This is a Twitter-like experience where the author can add up to four poll questions and set the duration. Responses are anonymous and the running total of responses is displayed when the user makes their choice. The vendor also points to integration with M365 Forms (see Scenario 9) as an option for running a poll or survey, embedding a form into content items via iframe.

# 5. Information finding and knowledge management

score 2

The search panel lives in the main toolbar at the top of the site and search functionality is identical on desktop and mobile. Results are initially shown aggregated, and the user has the option to browse them by content source tabs, as other applications can be integrated here, such as ServiceNow or Salesforce. While the 'all results' tab can't be filtered, content source tabs have basic filtering, for example by file type or published date; however,

filters aren't consistent across the tabs.

There's no configuration for search available, such as being able to allocate promoted search returns. However, results are returned based on the term used but also on fuzzy matches; for



example, a search on 'communities' will return results containing the word 'community'. This is a useful feature and not one that we often see with intranet search. There's some styling applied which sees returns 'fade in', which is an attempt to highlight the term in the result but, given it's highlighted in bold as well, the purpose of the fade is a little unclear.

Finding colleagues is also completed through the global search bar, ahead helps by offering returns based on partial entry of a name, though it doesn't make guesses based on misspellings, which is surprising given the fuzzy matching on content. Profile fields such as department and location are also searchable. There's a summary of employee details provided on the 'all results' tab, but details are better presented on the 'people' tab. There's also an option to open Delve, if connected, to search for further details. Note that ahead doesn't provide an organisational chart within the site. Admins can define what displays on profile pages from a default list of profile properties, and further properties can be made available on request.

Outside of search, ahead is keen to encourage knowledge finding through making content associations by adding link 'cards' to pages. This is covered in the Highlights. Site pages are generally well laid out and digestible but there aren't specific components such as accordions to help with the layout of longer format content. Documents attached directly to a page aren't searchable and, as mentioned in Scenario 1, we are concerned by the information architecture limitations for creating more complex content structures and the impact on the browsing experience.

# 6. Admin experience and governance

SCORE

The administration in ahead has the same usable interface as the rest of the site and, with some exceptions, this is an enjoyably easy environment to work in. It's worth noting there is some on-page support for publishers in the form of tooltips, and admins can open a support ticket directly out of the application. Configuration options are limited, however, and it must be emphasised that having good quality Active Directory data is fundamental to being able to use functions such as audience targeting to best effect.

Start page and landing page layout is fixed, except for the start page News panel that can be repositioned above Stories. This ensures a consistent experience across desktop and mobile (see the Highlight covering design) but relies on regular content turnover to keep the start page interesting. Some curation will be required to strike a balance between keeping the page fresh and not moving content on too quickly, too.

The main content mega menu is easy to build and amend, even on mobile. However, to populate the quick links and applications sections, site admins must import desired links via a csv file. Given the simplicity of other tasks, this is a convoluted approach, and one we would like to see improved.

All user permissions are set via Active Directory (AD) groups; there isn't the ability to assign individuals' permissions within the site. Intranet managers who don't have easy access to AD configuration may well find this too inflexible. However, the advanced audience targeting option (see Scenario 3) can also be used for permissions.

There are no publishing workflows available as such, though an author can give another user with the same permissions the right to edit their article, and that colleague will be notified when the article is first created. Publishers can't set an end date for articles; these need to be manually archived or deleted, creating an overhead for monitoring out of date or redundant content. We'd like to see the ability to add an end date to unpublish or archive content automatically.

Finally, ahead's multilingual capabilities for content publishing are very much to the fore and these are covered in the Highlights.



# 7. Analytics

SCORE 2

Analytics offer an overview for internal communications around readership and engagement, however the information available is limited, essentially providing snapshots of activity rather than in-depth analysis. There are four dashboards available: 'overall usage', 'content overview', 'news' and 'stories'. Overall usage and content overview only cover the previous week, while the news report offers weekly, monthly and quarterly reports by default, along

with a custom date range option. Overall usage gives basic engagement figures such as total users or number of onboarded users, which can be filtered by target audience. On the content report, stats are limited to number of items published, the type of content, and contributing users.

The news dashboard is a bit more detailed, providing generic volume stats and a 'coverage' rate showing the reach percentage. There's also a read rate, defined as the percentage of visitors who have stayed on a page long enough to have read it all. Data can be sorted on all these parameters and be exported to Excel; within the data export there's additional information regarding channel use and polls, along with 'glance' and 'skim' rates for articles. This information would be better housed in the insights section rather than the download, but it does provide more detail around content performance.

On content pages themselves, publishers are given some basic reporting. Bar graphs show the percentage of target audience reached, and there's a summary of 'glanced, skimmed and read' behaviour. For mandatory read content, the percentage of confirmed reads is displayed as a chart in real time. Publishers can download a report of mandatory read data, however, the download provides data only up to the point at which you first download it on the day; it will not update again until midnight, which is when it would provide a breakdown of all historical data. We can see this being a potential source of frustration and providing a way to download mandatory data on demand would be preferable.

Aside from content performance, there's nothing to help admins understand what's happening on the site, for example there are no reports relating to search, and more site-related insight would be a helpful addition.

# 8. Digital workplace integrations

SCORE 2+

ahead offers a number of integration points with other systems, with options to bring content into the site via iframe or API. At a basic level, links out to applications are provided through the quick links or applications sub menus, which live in the mega menu (see Scenario 6). Closer integrations are available for notifications, the activities feed, and to integrate with search.

Notifications from Finance and HR systems, for example, may be manifested in the notification list through an API. Content from external sources, such as social media sites and Dynamics CRM, can display in the activities feed. Admins are able to configure these using ahead's out-of-the-box connectors, including for MS Power Automate, or they can request assistance from ahead. There's more detail about the activities feed in the Highlights. Clicking on a link in notifications or the activity feed will take the user out of the site onto either a browser

version of the app or, on mobile, the native app if it's available. Deep links take the user directly into a record or page on the destination system.

People data can be used to present automatic celebration messages in the activities feed, such as work anniversaries. Any structured data could be used in this way, and there are good opportunities here for personalisation and further employee engagement.

Within content areas, it's easy to bring iframed content onto a page. A simple field-driven approach makes embedding the iframe easy for publishers, and the height of the iframe can be adjusted prior to confirming the embed. There's also a field for adding a URL so an external image can be used as the main picture for an article.

Integration is available for search, with the site able to search across an integrated information source such as a ServiceNow knowledge base, or external document libraries. Results are presented in all returns or on separate tabs (via drop down on mobile) and are always based on user permissions within the source application.

# 9. Microsoft 365 integration

SCORE2.5

ahead's closest integration with M365 is with SharePoint. In the 'My Work' section, ahead will show the user a list of recent documents from SharePoint sites that the user has recently visited, or sites they follow, are presented on separate tabs under the documents section. As with other ahead functions, this experience is the same on desktop and mobile, and either a browser app or native app will open on a link click depending on the user's device.

Documents from a connected SharePoint library can be directly added into ahead articles. Search results from SharePoint will be returned alongside other returns but can quickly be viewed on a separate, filterable tab. Helpfully, search configuration within the M365 tenant will be reflected on SharePoint content within the ahead search.

ahead acknowledges that the integration with Teams is a work-in-progress, and customer feedback points to this as an area for improvement. Currently they offer an ahead app available from the left-hand menu within Teams, containing news items pulled from the ahead site. Once the app is installed, Teams users will receive a notification when a news item is published. Perhaps more usefully, users have the ability to drop a card link into a Teams chat by selecting an item from the ahead app within Teams and sharing it directly into the chat feed.

There's no integration provided for Yammer or Viva, however there is integration with Stream where video content can be added into in News, Pages or Stories.

There is integration with Forms, and we liked the simplicity with which a form can be brought into pages via an iframe. Configuration takes place in Forms rather than ahead, such as setting 'form submitted' messages, allowing multiple submissions, or enabling email receipts. ahead sees a particular use for this integration with employees who aren't desk-based, highlighting they often won't have an M365 licence and primarily use mobile phones, and hence Forms within ahead can be an effective way to obtain feedback and information from a traditionally difficult to reach group.



# 10. Wildcard

score 3

The Company Compass in ahead is a site section housing content specifically related to core values, company vision, mission statement, and goals. By itself it might not attract a great deal of attention, however, the strength of the feature lies in the ability to associate any piece of content within the site with Compass content, thereby bringing these value elements into the foreground for users. For instance, an employee contributing a Story can link it to Compass content

and provide a reason for the association. Similarly, on a standard article, the publisher can embed a panel link to a Compass content item.

The rationale is that where a business has employees who aren't desk-based, it can be difficult for those colleagues to engage with company values and overall vision / mission. Giving regular visibility to this type of content is one way to help instill those values into the employee base.

Essentially, this is a featured article function and there's a prominent space on the start page given to an article from the Compass and a route into the section. We liked that when a user views any piece of Compass content they can click on a 'timeline' which shows all the content and activities that have been associated with it, and when this association took place. We would like to see the timelines accessible from the Compass start page, or even an aggregated timeline presented on the Compass page itself, as this feature is somewhat tucked away.

Overall, this is an admirable effort to tie company values with the 'mainstream' of content activity, with scope to develop it further to enhance its effectiveness within the product.



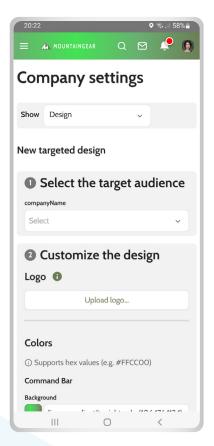
# **PRODUCT HIGHLIGHTS**

# Design and branding

We've highlighted how design and branding is controlled within ahead as it's not overly common to see simple controls available for administrators and we like the approach taken. There is the option to create multiple designs within the site and use audience targeting to present the different designs based on user permissions. This is very easy to set up and is another example of the thought that has gone into ahead's UI. Unusually, this is easy to do on mobile too and so we have chosen to share screenshots from here.



The design console shows designs already set up and the call to action to create a new one.



Users can select from a list of target audiences, which are managed elsewhere in the admin console.



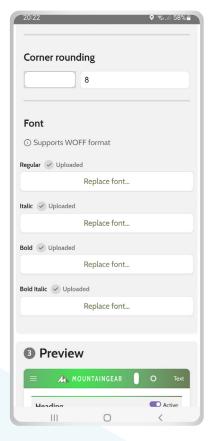
There are four options for selecting colours; HEX and RGB values are supported.



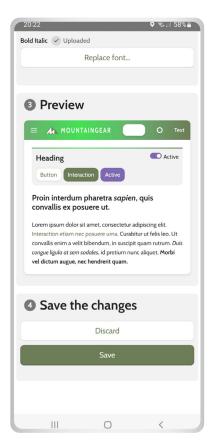
Within Company Settings, selecting 'design' opens the design console. A list of all the current available designs is shown, along with the option to add a fresh one. The first step is to select the target audience (see Scenario 3). Adding a logo is next, with a tool tip providing guidance on dimensions, file size and format.

Once that's chosen, the site colours can be configured using hex values. There are four colour settings: one for the command bar, one for links and icons, one for interactions such as posting, and a further one for signalling 'active' status, such as a poll badge on an article. There's a choice to present fields and boxes with rounded corners and four options for font covering regular, italic, bold and bold italic. To replace the font, admins simply upload a new WOFF file (Web Open Font Format).

ahead then presents a neat preview of the design, showing the colour scheme in place for all the configurable elements, and the option to save or discard the changes.



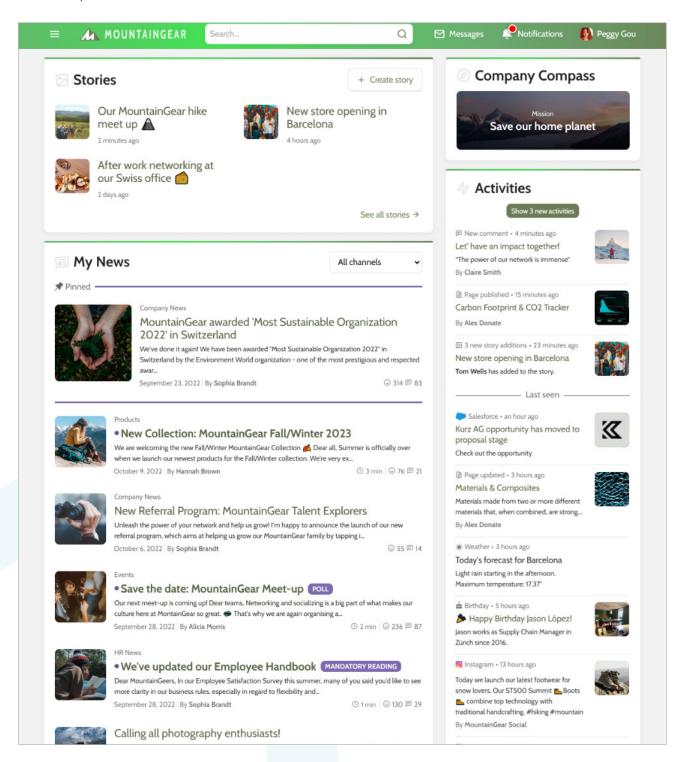
There are four options for amending the site font – regular, bold, italic, and bold italic.



Once the new design has been compiled, ahead offers a review of all the elements prior to confirming it should be saved.

## The activities feed

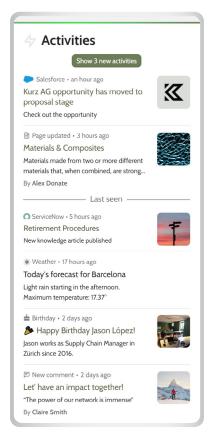
The activities feed provides a familiar consumer app-type experience for users. A scrollable list of posts is populated with content both from within ahead and from external sources that have been integrated, and what's visible to the user is based on their permissions. All content-related activity within ahead is shown in the activity feed along with useful details of when it happened and who published it, such as latest comments.



The activities feed sits on the right-hand side on desktop. It displays content activity taking place in the site as well as any content coming from integrated external sources.



The opportunities for presenting content here are really only limited by what companies have available for integration and what they want to present in this format. For example, it could be used to concentrate on presenting content from sources with a more operational purpose, such as Salesforce or ServiceNow, with Stories then providing the focus for user-led activity. Alternatively, it could have a more 'social' feel, bringing in company social media feeds or external items such as blog posts. Clicking on a link in the feed will take you directly into the item. For content that's come from external sources, users will either be taken to the native app on mobile (if available), or a browser version on desktop.

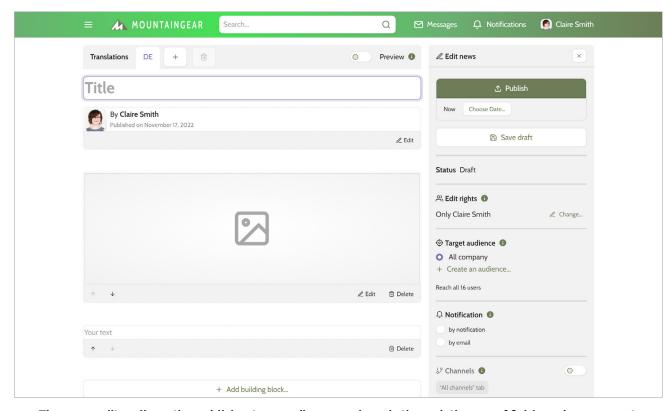


External sources can be readily integrated with the activities feed using ahead's connectors. The emphasis of the feed could be operational, more social, or a combination of everything.



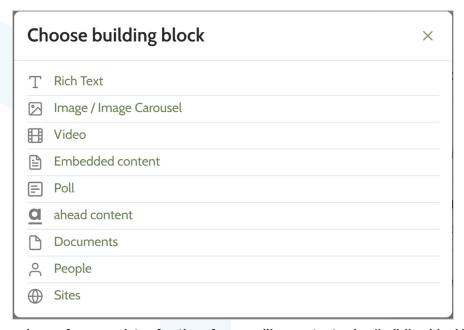
# **Content editing**

Creating content is a very smooth experience in ahead whether on mobile or desktop, with identical editing functionality on both. The publishing interface is largely field driven, and content is also compiled through the use of 'building blocks' which allow publishers to add content quickly and simply. As it is component driven, there's little to worry about in terms of page layout, which leads to a consistency of presentation throughout the site. There's no limit on the number of blocks that can be added.



The page editor allows the publisher to compile a page largely through the use of fields and components.

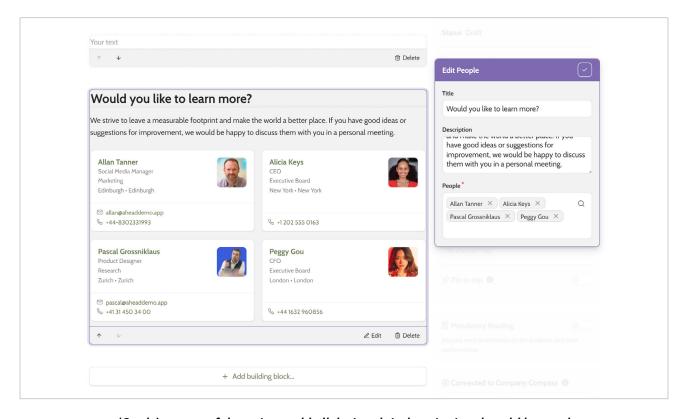
The right-hand column is where elements such as publication date and target audience are set.



Publishers can choose from a variety of options for compiling content using 'building block' components.



One of the building block options is to add related content presented in what ahead calls 'cards' - essentially styled links. These could be used in a flexible way to guide users through a series of steps, for example during employee onboarding, or for following a training process, especially when combined with mandatory reads.

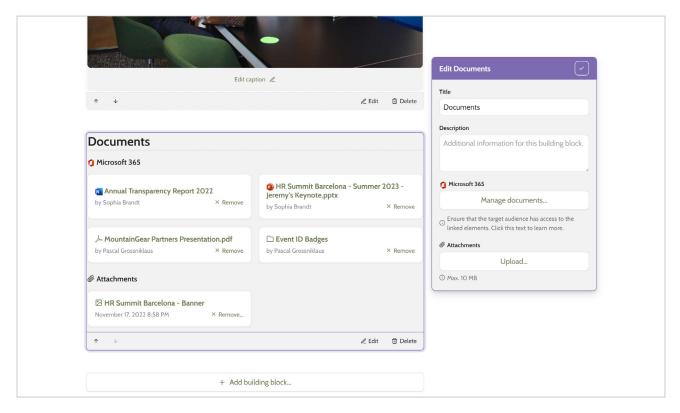


'Cards' are a useful way to provide links to related content and could be used flexibly to assist scenarios such as onboarding or training.



The rich text editor is quite pared back, and formatting choices could be slightly more generous – for instance there's only one heading size. Where the publisher has relevant permissions and integration is in place, documents from external sources such as SharePoint can be pulled into the page directly.

Prior to pushing content live, the publisher is presented with a review of the page settings, including target audience and who has permission to edit the page. Content can sit in draft and publishers will like the single click option for duplicating a page.



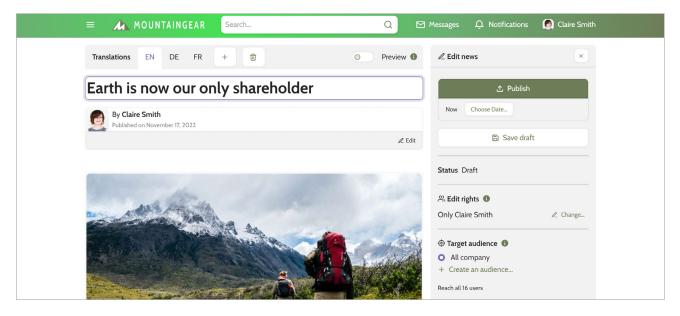
Documents can be added to the document building block directly from a SharePoint library if connected.



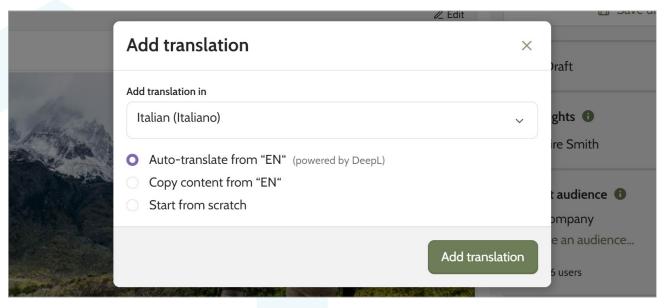
# Multi-language options

ahead's multi-language options start when the user is asked to select their preferred language on first log-on, although they are able to change this subsequently in their profile. ahead offers three language options by default to the user: 'interface' – which is the language for elements such as headlines and buttons; 'content', covering preferred language for viewing ahead content created by publishers; and an 'auto-translate' option which can be used to auto-translate news and pages. On selection and save, the language will change instantly on the site.

In news or page publishing, the first step is to select the language used in the article. The publisher is advised that the page can be translated once in draft, so they can process with the page build. Once the page is drafted in the content editor, the publisher can opt to create as many translated versions of the content as they wish. There are options for auto-translation, creating the translated content from scratch, or copying the source and changing it in situ.



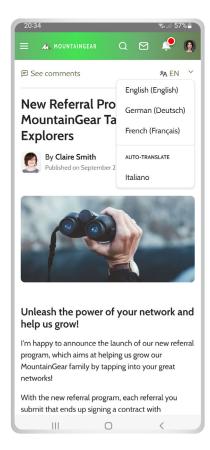
Once a page is drafted, the publisher can easily add translations if required.

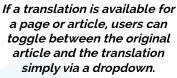


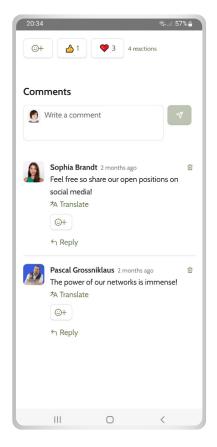
Publishers can select an auto-translation option, copy the original article, or write a fresh (translated) one from scratch.

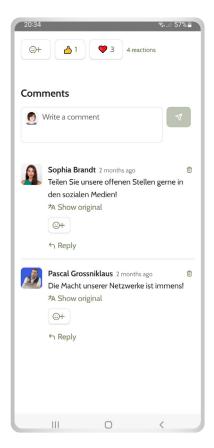


Once a page is published, a simple click on the page displays toggles between the original text and the translation. Comments can be instantly translated too using a single click, allowing users to converse and interact in their native language.





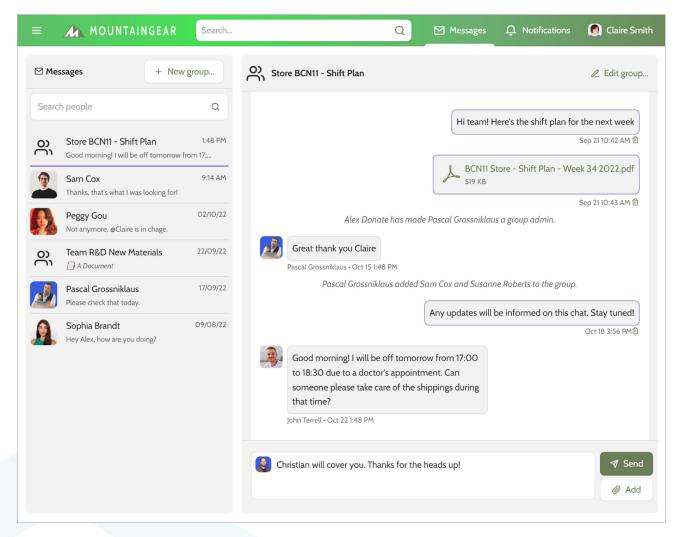




There's an option to translate comments automatically on a single click. The comment will display in translation and can be toggled back to the original.

# Chat and messaging

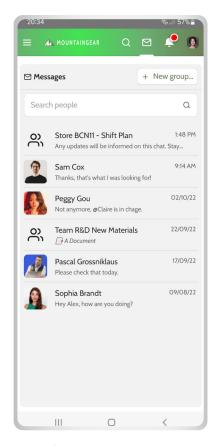
ahead offers a messaging service as a premium option, although it has been included in the price provided for this report. If enabled, it's accessible from the main tool bar at the head of the page. Users can chat on a one-to-one basis or create groups with multiple users. The chat interface provides a list of all the chats the user has access to, along with the options to create a new group. The conversation panel is in a familiar consumer-app style and the user is able to post text and images, and share files.



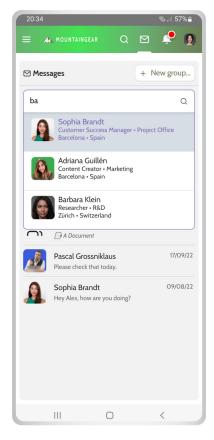
The chat function provides a consumer app-style experience allowing one to one and group conversations.



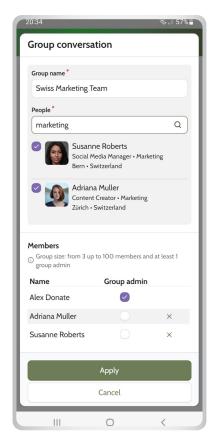
To begin a new chat the user can search for a colleague to message, or they can create a new group. Search will make suggestions for contacts after two or more letters have been entered. To create a group, the user first gives the group a name and then begins to compile the group by search for colleagues to add. Up to 100 users can be added. There's also the option to assign admin rights to other users so they can add or remove colleagues from the group and delete messages if required.



Conversations in progress, whether individual or in groups, are provided in a single list.



In the people search in the chat tool, ahead will suggest colleagues based on the first two letters entered.



Users can define the group name and add up to 100 participants. Admin rights for the group can be assigned to other users.

# THINGS TO BEAR IN MIND

ahead is at its strongest as a communications and employee engagement tool. While content creation is simple, anyone looking to set up a large knowledge base, or who has a requirement to publish a high volume of static content, might find page menu and navigation options limiting. Additionally, site analytics are somewhat lacking, although they aren't the worst we've seen in this report and there are some developments planned to improve this area.

ahead is reliant on AD for all user access and permission management. While the tool provides good and flexible options for audience targeting using the data available to it, in our experience AD is frequently not set up as well as it might be, and the need to manage it closely to make best use of ahead's functionality might prove too restrictive for some. As ahead offers an excellent user interface, it shouldn't be ruled out on AD management grounds alone, but potential site managers will want to reassure themselves that they have a route to managing the required AD set-up effectively. Note, too, that frontline workers will also require some form of authentication through AD, which is more restrictive than we have seen with other tools.

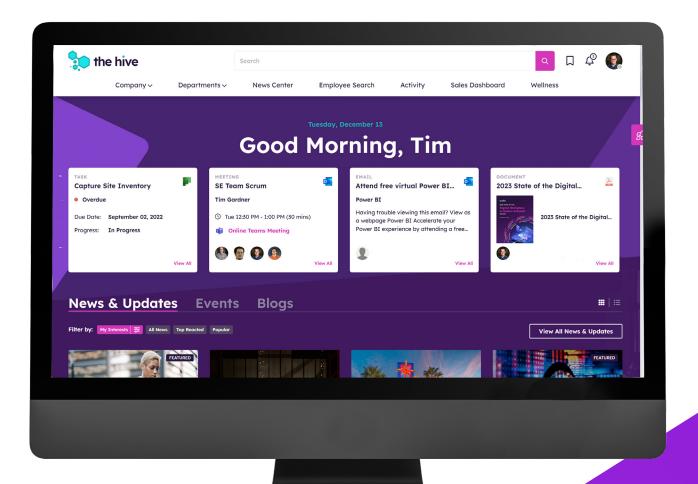
In terms of price, ahead looks good value for this type of communications-oriented tool and the user experience, particularly for mobile, makes it stand out. Potential buyers should take care to check what comes as standard and what will incur extra costs though, particularly as an existing customer expressed that they would like better overall transparency in this area.

# Why choose this product

ahead provides many of the features that are found in other products but it's the overall user experience which makes it stand out. The mobile experience in particular is top-class and for companies with a dispersed deskless workforce, it offers parity of experience with desk-based colleagues. Content creation is easy, and there are multiple touch-points for employee engagement. Its translation features are also excellent, including on-the-fly in comments. It's likely to suit businesses of small to medium size looking to focus on communication with and between employees.







# Our view in one tweet

Akumina from @AkuminaInc is a highly flexible platform, with an excellent approach to application integration and offering a great employee experience.



Platform owned by Akumina

Akumina Employee Experience Platform was first introduced in 2015 and is owned by Akumina, who are headquartered in New Hampshire, USA. The platform is a highly flexible and mature product that delivers a top-tier experience for desktop and mobile users alike. Features for content. creation, collaboration and information finding are excellent, and the options for integrating with Microsoft 365 and thirdparty applications are among the best we've seen in this report. The product is also easily extended to offer extranet and portal functionality.

There are a few areas where we would like to see improvements made, however. The out-of-the-box analytics are highlevel and presented simply. The admin experience has improved since our previous review in 2022, most notably in the area of content management, but other areas such as the Akumina Flow engine are complex and require technical skills. Akumina says that further improvements in the admin area are on the product roadmap.

It's worth noting that Akumina relies

on the Microsoft ecosystem in order to work, but it does not require SharePoint to deliver intranet pages. Businesses have a choice to rely on SharePoint for displaying content pages (called a 'headed' delivery) or to use SharePoint only as a data service (called a 'headless' delivery); Akumina says that most customers opt for the latter approach. We found that Akumina performs better when deployed as 'headless', with faster page load times for example. Businesses that have Microsoft will still make good use of their investment, but without being tied to SharePoint interfaces and approaches.

Overall, Akumina is likely to appeal mainly to large and complex enterprise organisations, as its flexibility and mature features will meet many of their requirements. Smaller businesses can get up and running quickly with an out-of-thebox offering, but the price point for them is high. For those organisations that have the ambition and the resources, Akumina offers a strong proposition to create an integrated digital workplace.



# Summary table of scenario scores

# NO. SCENARIO/SCORE User experience and visual appeal Mobile and frontline support 2 Internal communication 3 Community and engagement 4 Information finding and knowledge management 5 6 Admin experience and governance 7 **Analytics** Digital workplace integrations Microsoft 365 integration 9 Wildcard 10

# **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$
20,000 users	\$ \$ \$

#### PRICING MODEL

Subscription – price per user per month, Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, government / public sector, multi-year commitments.

Price includes: Training for admins, training for end users, maintenance, product support, updates and upgrades, hosting, access to a community & webinars.

# Key benefits

- Akumina is a highly flexible product that offers businesses a great deal of choice around design and features.
- The approach to integration of business systems and M365 tools is excellent.
- The overall employee experience for desktop and mobile users is strong and consistent.
- · Content creation and management is handled in an intuitive yet powerful user interface.

# Improvements and considerations

- Out-of-the-box analytics could be improved to offer a greater depth of data.
- The admin experience has recently been refreshed in some areas, but other parts of the admin functionality would benefit from a similar overhaul.
- The price point for smaller organisations is comparatively high.



# **Product type**



# **Branding opportunities**

All branding, complex options

# Target businesses



**SMALL** less than 1,000 people



**MEDIUM** 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems

standalone







Requires SharePoint



Optionally works with SharePoint



Other\*

# **Sectors**





**Engineering and** manufacturing



Retail



**Energy and utilities** 



Healthcare

You may also be interested in...









Akumina requires Microsoft in order to operate, however, businesses can choose whether the platform is positioned on top of SharePoint or separately.

# **COMPANY AND PRODUCT**

# Company details



#### Company Akumina



# Company founded

2015



#### **Company locations**

Nashua, NH USA (HQ), UK, India, Brazil



#### ISO 27001 certified

Akumina says it holds a number of industry-expected certifications around privacy and data security.



## Typical client size

3,000+ Employees



# Largest deployment so far

240,000 employees in over 80 countries.



#### Partner locations

Please <u>see their website</u> for details.



#### Customers

Please <u>see their website</u> for details.

# Product and technical details

Name of product	Akumina Employee Experience Platform	
Product launched	2015	
Current version	6.0 (October, 2022)	
Accessibility	WCAG 2.1 compliant	



#### Deployment

Client onpremises Client private cloud Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant Other

#### Data residency

Akumina offers both SaaS and self-hosted deployment options of the platform. The Multitenant Cloud has locations in the USA, Canada, UK, Germany, India, Singapore, Australia, and Japan.

#### Client data encrypted

#### **Authentication supported**

Azure Active Directory ADFS	Open ID	Oauth	G Suite	Other*
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<sup>\*</sup> Okta, EmpowerID, Ping, SiteMinde

#### Search technology

Apache Lucene/ Solr	Apache Lucene/ Elastic	Microsoft	Vendor's own	Other*
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<sup>\*</sup>Autonomy, Sinequa, Coveo, and BA Insights are supported in addition to the ones above.

### Document library sources integrated

Вох	Dropbox	Google Drive	SharePoint	OneDrive	Other
*NetDocs and M-Files					

#### SharePoint/0365 versions supported (if applicable)

SP Server 2016	SP Server 2019	SP Server Subscription Edition	SP Online	Viva Connections

## Mobile app deployment

Google Play store	Apple store	MDM	МАМ	Other*

<sup>\*</sup>Akumina also offers a private corporate app store.



#### Reverse-out options

Akumina is typically not any customers' primary source of data and does not remove any data from the customer's existing source systems. While Akumina synchronises data to deliver personalised content-based experiences into its platform, only certain customer data resides 'exclusively' in the Akumina's use of the Azure CosmosDB and Azure Storage services.

#### Languages supported

Akumina supports all languages offered by Microsoft 365.

#### Machine translation

Yes - via the product

#### Right to left script

Yes

# Set-up and support

#### Set-up process for new clients

Akumina offers the platform via both a SaaS deployment model and via a self-host deployment model. Akumina's customers can start from a series of pre-configured foundational experiences (that are included with an Akumina subscription at no extra charge) or start from a blank slate to create their new experience under Akumina's 'Total Visual Control' design freedom capability.

#### **Product updates**

Akumina releases approximately two to three major product updates a year. Akumina also provide patch and point releases three to four times a year.

#### Product update process

Akumina SaaS customers are delivered new capabilities and releases through a traditional non-production environment first, then to a production environment during defined maintenance windows. Akumina self-host customers are provided the new capabilities through an upgrade wizard-based deployment on the customers timeline and under their governed pipeline process.

#### Technical support

Akumina has support personnel globally located to be able to provide all day, every day first response support. Akumina's support line routes the request to handle first response, triage and assignment of the support incident based on Akumina's SLA policy.

## User community

Akumina has an active online user community and provides an annual Customer Advisory Board meeting, which is typically held in-person but has moved to a virtual model at this time due to travel restrictions across various customers and countries.



#### In their own words

Akumina says: "The Akumina EXP enables enterprise employees to do their best work in a vibrant and connected digital workplace experience. With over 6+ million active daily users all over the globe, Akumina empowers communications, human resources & IT professionals to deliver personalized digital experiences to their workforce on any device, in any language and at any time."

# Their view of the marketplace

Akumina says: "At its core, the Akumina EXP addresses many challenges that businesses face today: simple content authoring, ability to communicate effectively with employees, and allow team members to find the information they need to do their jobs. Through key features like total design flexibility, localization, Broadcast Center, Mission Control, Intelligent Activity Streams, Persona Builder, onboarding tools, and extensive integrations, and many more, we are able to provide our customers with simple solutions to complex business issues."

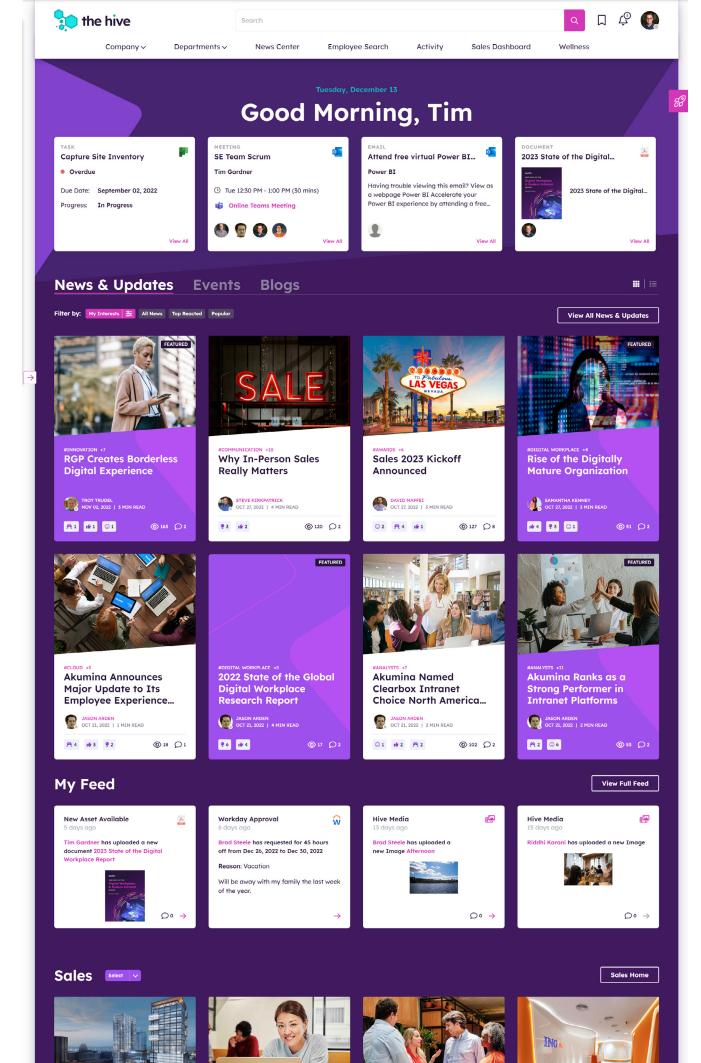
# Voice of the customer

Several customers praise the freedom and the flexibility that Akumina offers to create custom designs and layouts. One customer likes "the autonomy to decide how to lay out your intranet to fit user needs" while another one mentions "the ability to achieve custom UI/UX on top of SharePoint Online". Clients appreciate that Akumina "is really a platform – built for integrations and customisations" and praise the support that Akumina offers along the journey. One customer sums it up succinctly: "Great UI, great team, great possibilities."

When asked about improvement suggestions, some customers mention the content authoring experience and CMS functionality. For instance, one customer asked for "more streamlined and efficient authoring for content owners". This part of the product has been significantly improved in the latest version of Akumina (see Scenario 3) so these customers will be looking to upgrade to the newest release. The upgrade process itself is also an area where several customers want to see enhancements. "Better release notes for new versions and an easier path to upgrades" is what one customer wants, while another is looking for "better product build quality, better documentation". Yet another client would like "smaller, easier, iterative changes" as opposed to "daunting project-size changes requiring a good deal of planning and management".

Working together with Akumina has been a positive experience for most customers. According to one customer, "Akumina has been a superior vendor and we value the partnership" while another praises the whole team: "We've never had an issue getting assistance from anyone on the Akumina team! If the person you're talking to doesn't have the answer, they will find the person that does." A few customers have raised concerns about responsiveness of the support team. "Issues take a lot of time to resolve" says one client, and another finds that "product support has been uneven, sometimes responsive, but other times very unresponsive". Still, the majority of customers are more than satisfied: "Akumina has a skilled support and account management team. We've had a very good experience working with them."





# **REVIEW**

# 1. User experience and visual appeal



Akumina is an attractive and flexible platform that gives administrators many possibilities to create a highly customised look and feel. While most intranets begin as an out-of-the-box Akumina foundation site, all aspects of design and user experience can be controlled by in-house experts where wanted, or by an Akumina partner where assistance is needed. End users too can configure many elements of their experience, such as widgets on the home page to display their

tasks or surface other relevant information. We were shown some examples of how customers have put this flexibility to good use; see the Highlights section for details (including information about the 'me-bar' referenced below).

The product's flexibility extends to the navigation. Customers have a choice between a simple top-level mega menu, or a bar on the left with descriptions under links and highlighted content in the form of images. Navigation is audience targeted and security trimmed, potentially giving one user a very different experience from a colleague.

The user interface offers different ways for users to stay on top of their to-do list. A centralised notification system brings messages from across the product together under a bell icon. Notifications from external systems, such as a task in Workday or an update in ServiceNow, are also accepted and integrated (see Scenarios 8 and 9). There is a 'me-bar' widget with personalised actions, such as an overdue task from Planner, and there is a card-based activity stream where cards surface calls to action coming from various applications. This works particularly well on mobile devices, where it turns into a social media-style feed.

Branding is another area where the product's flexibility allows administrators to build intranets that look very different from customer to customer. When installing a foundation site, a default theme is applied, but this can be adapted and expanded later. Different site templates can be applied to regional or departmental sites, or to create a site for a sub-brand within a multi-brand organisation.

Overall, Akumina provides an attractive set of capabilities. It's a mature product that offers a lot of choices that might overwhelm less digitally savvy users. Admins can introduce online help for people to get used to the platform, and the recently improved interface for content creation (see Scenario 3) will be intuitive for most knowledge workers. Still, digitally mature organisations will certainly get the most out of the product's features.



# 2. Mobile and frontline support

SCORE

The flexibility that's evident on desktop transfers into the mobile experience, which offers some simple solutions for mobile and frontline users. For businesses that have chosen to run their intranet on top of SharePoint (a so-called 'headed deployment'), all users will need a M365 license. Organisations that have chosen not to deploy on top of SharePoint (a 'headless deployment') avoid the need for this additional license cost, which is especially useful for

frontline workers who may not need other Microsoft applications. More about headed versus headless deployment is covered in Scenario 9.

A dedicated mobile app is available for iOS and Android, which can be deployed using an MDM or MAM solution or via a private app store. This means that the app can be white-labelled and branded as desired by customers. There is no generic version available in the public app stores; Akumina says that this is on their roadmap. The native app uses a web view to surface the content from the responsive site, while supporting all typical features of a native app such as push notifications and biometric access. For users that aren't already on a central database, Akumina can provide a sign-up form with a configurable background workflow to grant initial access.

While there are no features in Akumina created solely for mobile, administrators may decide as part of the configuration that certain elements are only appropriate for mobile users. The card-based activity stream, mentioned in Scenario 1, works well on mobile. A 'wellness check' poll (see Scenario 4) and a pay stub display card are nice examples of features that are particularly relevant for frontline workers.

Administrators will target content to users via a 'mobile' Persona, directing certain features or individual pages of content to them. More about the creation of Personas is discussed in Scenario 6. Admins may also choose to simplify navigation for a mobile view, which is helpful given the potential for the site to be very comprehensive.

# 3. Internal communication

score 4

In late 2022 Akumina overhauled its content creation functionality by bringing it to the front end of the product and giving it a much more contemporary look and feel than in previous versions. Content authors and editors now have access to a left-hand side navigation bar with intuitive icons for accessing the different features and overview areas. Please see the Highlights for details.

When creating a new message, content authors will select a message type, which determines a number of preconfigured options such as the layout of widgets on the page and the approval process that the message needs to go through. Experienced content authors can be given full freedom to control the layout of the article, while others will follow an intuitive template to create the body of the story and set appropriate metadata. News stories can be flagged as featured, publication and archive date fields are available, and tags are easily added. We like the possibility to preview the story for different devices, such as mobile and tablet-size screens.

Akumina includes the concept of 'Personas', which are target audience groups set up by administrators (see Scenario 6). This makes it easy to target news articles to the right people



based on their profile data. There is a news centre that gives an overview of all articles, which is useful, but we would like to see some additional features, such as a visual Kanban board, to help internal communicators with editorial planning.

Creation of static reference pages follows a similar approach. Depending on permissions, authors may be confined to work within a predefined page layout or may have the freedom to adapt the layout and change the configuration of the widgets.

Urgent and crisis communication is handled well through dedicated 'broadcast' messages. These are managed separately from news articles and include a range of specific delivery channels. For instance, it is possible to have alert messages appear as a banner, as a popup message upon login, as an email, or an SMS message.

Communicating across channels is enabled in different ways. News stories can be shared in MS Teams, while broadcast messages can be pushed out via email and SMS. Where users can't access the intranet on their device, digital signage and kiosks are supported via Personas, although the management of the digital signage screens is not integrated into Akumina and so is a limited option when compared to other platforms. Finally, users may share news into personal social media channels; news articles are set up and approved for this purpose during the article creation process.

# 4. Community and engagement



score 4.5

Akumina's flexibility stands out in this scenario, giving admins tools to build relevant and attractive community and engagement features. Community collaboration is handled well, where authorised users can provision themed workspaces for knowledge, communities, teamwork, and education. These workspaces can be open, for anyone to follow, or closed, just for selected members of a group or Persona, or selected individuals. While the provisioning

process adds standard widgets, admins have a good selection of others to choose from to then build the space appropriately. Widgets include discussion boards, an integrated Yammer feed, featured news, videos, blogs, or highlighted experts.

Akumina includes a range of features for commenting and reacting to news articles and other content. Commenting allows users to create posts and to react to the posts of colleagues in a threaded conversation. Users may report comments as inappropriate where needed, and admins can review to take action and potentially remove a post. There is also an option to have comments pre-approved by a moderator before they are published. If users don't want to leave a comment they may react instead. Reactions go beyond simple 'likes'; icons and the named reactions can be configured by an admin, making it appropriate for the business. The product supports gamification features such as earning badges based on activity, and there is also a feature that allows users to nominate a colleague for an award, linked with a nominee dashboard and review process.

Admins can choose to add simple polls to pages, which return results to users as they are completed. There is also a basic feedback form accessible from the bottom of every page. Alternatively, for more sophisticated use cases, there is Akumina Flow, a rich form building and workflow automation tool that will be useful in a range of scenarios. We were shown a well-executed example of a wellbeing feature, where a user is prompted to complete a poll asking how they're feeling. Based on the user's reply, a variety of actions is proposed, and results are tracked in a dashboard. Their manager optionally receives updates as they complete certain tasks. Please see the Highlights section for more about Akumina Flow.



# 5. Information finding and knowledge management

score 4

Akumina uses Microsoft search by default but will integrate with other search solutions that are in use by an organisation. This means that certain aspects of search rely on the source system rather than Akumina, for example promoted results and relevance ranking will use the Microsoft functionality by default, while Akumina manages the presentation of results.

As a user types in the search box, they are presented with suggested search terms and results. Alternatively, the search results page shows more, where the standard display is attractive with good icons alongside results to differentiate content types, and with searchable filters to refine results. We like the shortcut menu against each result that allows users to quickly download, open in a new window, share, add to favourites, or provide feedback, as well as the 'preview' button to help avoid navigating to an incorrect page. Simple search management can be completed via the Akumina admin screens, which are integrated into the AppManager (see Scenario 6). Broader search management configuration is handled in the source search system.

Users can search for colleagues by name or keyword in the global search, or within the people directory. Profile pages are attractive, displaying information as tags or free text boxes, although the org chart display is limited to a simple tree structure. People data can be fed from multiple sources, including Active Directory but also from Workday or SuccessFactors. When a user updates a field, this information can be passed back to the source where wanted.

Information finding is supported through a number of predefined libraries or content centres with local search capability, such as the news centre and media library. A local search box combined with relevant refiners and tags allows users to explore the content. At the level of an individual page or news article, related tags are shown. Clicking the tag leads to a page with more information about the topic, similar to Viva Topics. There is no dedicated knowledge base tool included in the product; instead, Akumina focuses on facilitating content discovery through an intuitive and consistent usage of metadata.

# 6. Admin experience and governance

3.5+

Administration in Akumina is handled in two different places. Management of pages and content is handled in an intuitive front-end experience, where admins and duly authorised content editors can create pages and templates, adjust layouts, configure widgets, etc. Other admin functionality is grouped in a more traditional back-end environment called AppManager. The different areas within AppManager are presented as a set of large buttons, opening into more

detailed screens, for instance to manage site permissions or to moderate comments. Other functionality included here is a 'Persona Builder', where user segments are created by applying rules to user profile data, and a 'Flow Designer' module where workflows are configured such as the wellness workflow described in Scenario 4 and in the Highlights section.

For life cycle management, publishers can see an overview of their content nearing expiry and renew, revise, or archive via personalised analytics dashboards. Expiry warning notifications are also triggered via email, the notification bell, and into the activity stream. These analytics dashboards are part of AppManager, so content editors are still going to be exposed to the back-end environment when consulting the reports. We would prefer to see these reports



migrated to the more user-friendly front-end, giving editors a consistent experience.

Multilingual support is strong in Akumina. By default, the product will display content in the user's preferred language, and users can select an alternative from a toggle. Different language versions are stored together with the original content item (which can begin in any supported language) and workflows can be set up to notify translation publishers if the original is updated. During content creation, an automated translation feature will translate and store the created text in all configured languages. Large organisations will also appreciate the option to export content and send it off to a translation agency, and then import the results back into Akumina.

Overall, we like the richness of the configuration options, especially in the new front-end experience. For instance, it is possible to set up multiple versions of the same page, which can be used to target different audiences with a different layout, or for A/B testing like on customerfacing websites. In comparison, the back-end experience within AppManager is less attractive, and some areas such as the Flow Designer tool are complex and come with a steep learning curve. Akumina says that an overhaul of Flow Designer is on the product roadmap.

# 7. Analytics

SCORE 2+

Akumina's approach to analytics is to give clients a set of widgets and dashboarding capabilities so that they can build the views they want. By default, the product is integrated with Azure Application Insights; other analytics tools such as Google Analytics can be hooked up as well. Akumina says that customers like to consider what data matters to them and what dashboards they would like to see, and Akumina or a partner will help them

with the configuration as part of the implementation process. We understand this approach but we feel that the depth of the out-of-the-box offering could be improved, to give customers a better starting point to work from and reduce the set-up effort.

The available analytics dashboards are part of AppManager and consist of around 30 widgets that visualise data across adoption and content, such as 'top reactors' and 'trending search terms'. Most of these widgets come with different views and flexible configuration options, allowing information to be shown by department, by Persona, or by some other category that is more relevant for the client. Some of the widgets get their data from Microsoft 365, such as a widget showing total tasks by department, which gets its information out of Planner. There is also a report available to support the A/B testing feature mentioned in Scenario 6, showing which page versions are more effective among the different target audiences.

Reporting is available for individual content too, such as views on a news story, survey results, or mandatory reading. This information can be viewed on screen or results downloaded to csv. For mandatory reads, any content can be marked as mandatory with an 'acknowledge' button applied to ensure the user has interacted in some way. The publisher can check the progress of who has read or not, but there is no feature to remind people.

All analytics widgets are integrated into the dashboard section of the back-end AppManager environment and have a consistent look and feel. They cover a broad range of the product's functionality and are nicely presented, but in some areas they are lacking detail. For instance, the search widget shows top searches, but other aspects of search are not covered.



# 8. Digital workplace integrations



SCORE 3.5+

Integration with third-party systems is an area of strength for Akumina. Different approaches are available, including the product's own connector framework (powered by the Akumina ServiceHub), via Microsoft Graph or using Power Automate. A large range of integrations are available out of the box, and there are different ways to present them to users.

A 'Mission Control' area is one approach, which is a personal dashboard that includes a launchpad of icons giving access to the most used systems or tools. These are configurable by users but can be locked in place by admins. Systems can also be integrated via widgets, providing a more in-depth experience where users can interact with the source system via the Akumina interface. Widgets can include activities, such as requesting time off in Workday, or surface information, such as a sales pipeline from Salesforce. Widgets can be grouped and linked together, so that an update in one widget triggers updates to related content.

Another integration option is to use the 'activity stream' within Akumina to present notifications and activities from across integrated sources. A stream can be added to the home page in the form of attractive cards, but on a dedicated page the functionality shines. See the Highlights section for more and note that 'activity streams' is a separate module, but its cost is included in the pricing in this report.

Integration with communication and collaboration tools such as Zoom and Slack is also possible through these same approaches. For instance, cards in the activity stream can link to a Zoom meeting or embed a Slack channel. Sending Akumina content into Slack is not available out of the box but can be set up using the Flow engine (see Highlights section).

Akumina supports federated search via Microsoft Search and the Graph connectors, or through alternative products such as BA Insight. This allows the indexing of third-party sources that are presented on the search results page. Helpfully, users don't have to remember the source of any federated content, as everything is displayed together. Finally, Akumina will integrate with Microsoft or other third-party bot frameworks and provide an attractive front-end to the experience.

# 9. Microsoft 365 integration

score 4.5

As Akumina relies on Microsoft 365 in order to work, integrations with Microsoft applications and especially with SharePoint are understandably strong. Akumina uses features of SharePoint, M365 and Azure for content storage, managed metadata, governance, and permissions. Customers have a choice to use SharePoint also as a page rendering engine, in which case Akumina content is displayed using the SharePoint framework; Akumina

refers to this as a 'headed' deployment. Alternatively, in a 'headless' deployment, pages are displayed independently from SharePoint in an Azure site. In both 'headless' and 'headed' delivery, the product can display any SharePoint content and document libraries in its various widgets. Where SharePoint content is displayed, it looks like Akumina content and so delivers a consistent user experience.

Along with the guick launcher that includes Microsoft applications, the 'Mission Control'



dashboard mentioned in Scenario 8 includes widgets that will show personalised activities for the user. This includes 'my recent documents' in SharePoint or OneDrive, tasks from across Microsoft applications, or upcoming events from an Outlook calendar.

Yammer is integrated well into widgets, which show followed communities, the 'all company' feed, and some example communities for users to follow. This allows appropriate communities to be added to page widgets, encouraging use of Yammer while ensuring its relevance. MS Teams is integrated in a similar way, offering Teams chat and a list of available Teams within Akumina widgets. The full product can also be made accessible as an app within MS Teams.

Support for Microsoft Viva is currently quite limited, but Akumina says that more is on its product roadmap. Content created inside Viva Connections, such as dashboard cards, can be surfaced within Akumina, but Akumina news is not displayed in the Connections feed. Akumina says that its focus is on other elements of the Viva suite, for instance to integrate Viva Insights into their analytics dashboard, and to integrate Viva Topics cards with Akumina cards in the activity stream. We agree that these will be interesting additions to the product once delivered, but currently support for Viva is not strong.

#### 10. Wildcard

2.5+

Akumina includes a number of capabilities that allow customers to not only power their corporate intranet for their employees, but also to deploy an extranet or portal targeted at other audiences.

A number of features within Akumina support extranets and portals.

The option to run Akumina as a 'headless' deployment, on an Azure site independently from SharePoint, makes it easy to set up security and access tial registration of targeted users is handled using a signup form and customic description.

permissions. Initial registration of targeted users is handled using a signup form and customised workflow, similar to what was described in Scenario 2 for frontline workers.

Once registered and approved, users will have access to a separate environment that may inherit some of the look and feel of the corporate intranet on which it is based, or it may have a completely different visual identity if desired. Using the 'Persona Builder' (see Scenario 6), the different audiences are defined, and a specific subset of intranet content is targeted to them. For instance, external users will be granted access to relevant news articles, workspaces for collaboration, media files and appropriate training materials.

We can see how this functionality will be useful to support different use cases for a range of organisations. Examples include franchisees in retail and hospitality, alumni of educational organisations, financial advisors and resellers of investment and insurance products, and many more. Examples and screenshots are included in the Highlights section.

Offering extranet functionality is not particularly unique or innovative, but Akumina's rich feature set combined with the 'headless' deployment in Azure makes it a powerful platform for a combined intranet / extranet solution. The examples we were shown are compelling and well-executed, and the benefits for businesses are clear. To make the proposition even stronger, we think that a setup wizard or similar functionality would be useful, bringing the various disparate features together in a single place. It's also worth noting that the extranet solution is not supported on 'headed' deployments, so existing customers with a 'headed' setup will have to migrate first to a 'headless' one.



# PRODUCT HIGHLIGHTS

# Flexibility in the look and feel, including on mobile

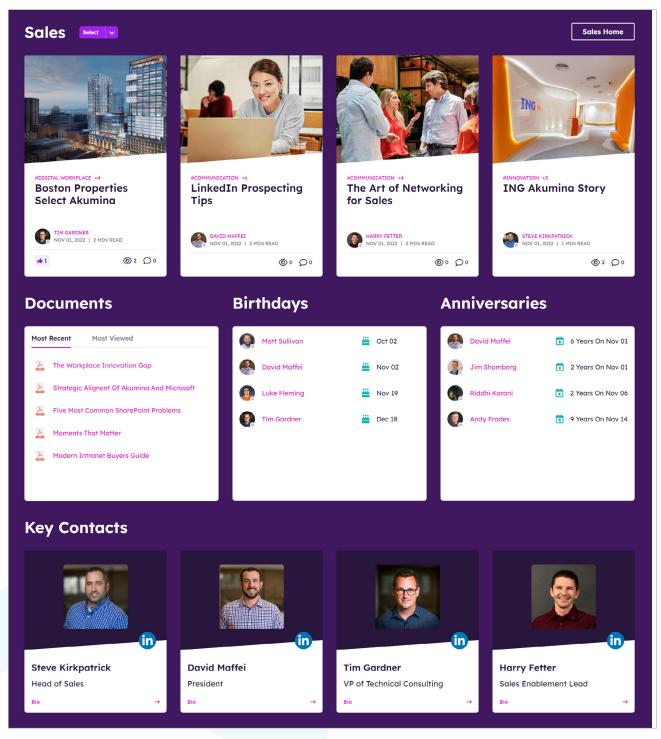
Akumina's flexibility is most noticeable in the different approaches that can be taken when creating the home page and setting up the overall design for the site. Many products will lock certain features down, such as the position of the search or the approach to navigation, however Akumina can be customised to work as the customer feels is most appropriate. Many intranets begin life as a foundation site, but there is total administrative control to change this. Custom designed sites often start with an InVision or an Adobe XD design before being brought to life on the Akumina canvas.

Branding choices are a big part of the look and feel, which admins or partners can apply to the site. Colours, fonts, backgrounds, and more can be changed to form the basis of the site as wanted. Then there are over 200 widgets in Akumina's library that can be configured in numerous ways. For example, the news widget displays articles in different ways, and there are many other widgets available to display practical information, such as latest documents.

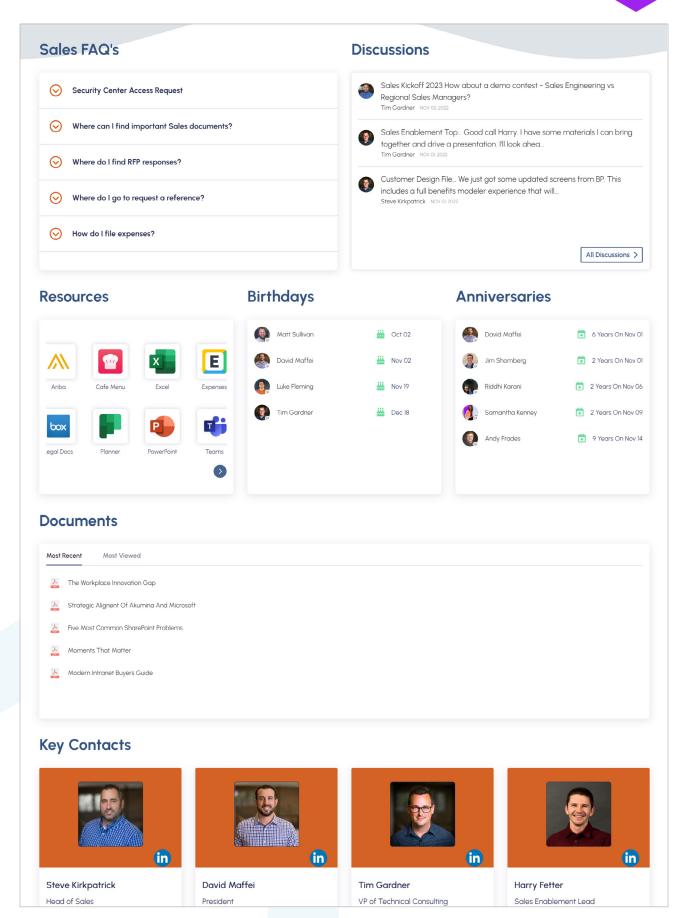


In this customer example, news is displayed in a carousel and navigation sits on the left.





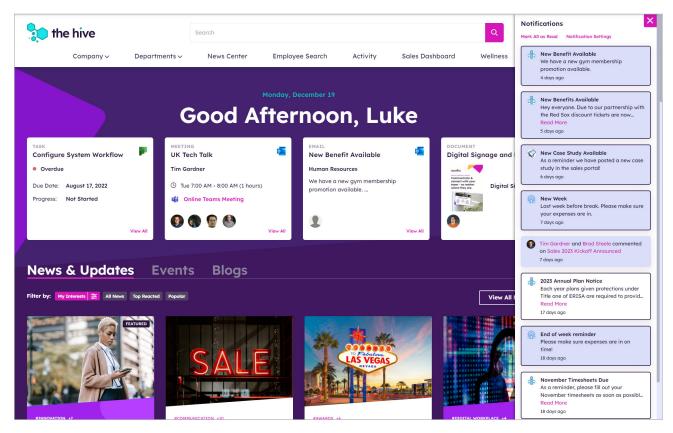
In this design example, news and other widgets are displayed using a card-based look and feel.



In this alternative design example, the news and documents widgets display information as a list.

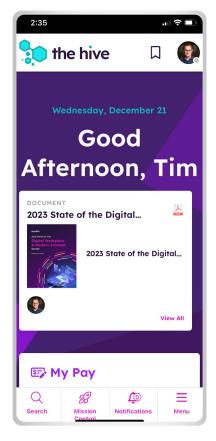


Flexibility in the site design extends to how notifications are presented to users, so they can stay on top of their tasks. There is a traditional notifications bell icon where messages from within Akumina and from external systems are brought together, but there is also a 'mebar' widget and an activity feed that administrators can decide to put on the home page. We especially like the 'me-bar' widget with personalised action cards, such as an overdue task from Planner or an upcoming meeting from Outlook, sitting prominently on the home page as a strip of cards just below the welcome message.



Users stay on top of their tasks thanks to a notifications panel and a personalised 'me-bar' that sits prominently on the home page.

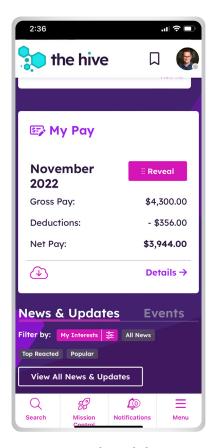
The flexibility of the product extends into the mobile experience. The card-based activity stream works especially well on mobile, and Akumina includes some cards that are particularly relevant for frontline workers, such as a pay stub component.



Mobile home page with the 'me-bar' experience.



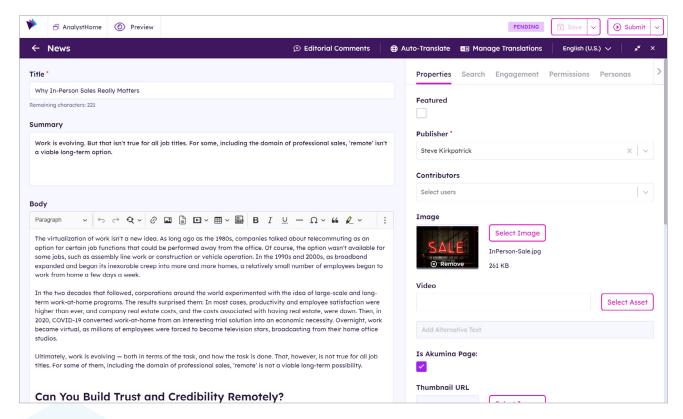
Consuming content such as news articles is intuitive.



A pay stub card shows salary information after clicking the 'reveal' button.

#### News and content creation

Akumina has overhauled its content creation functionality, bringing it to the front end of the product and giving it a much more contemporary look and feel than in the past. Content authors and editors are presented with an intuitive and consistent look and feel throughout the process. Two types of news exist within Akumina: simple broadcast messages, mainly used for operational or urgent communication, and fully-fledged news articles for a broader usage. Helpful overview reports of news and broadcast messages make it easy for editors to track pending approvals. Behind the scenes, Akumina's flow engine enables customised approval flows. Translation and targeting of content are also well integrated.

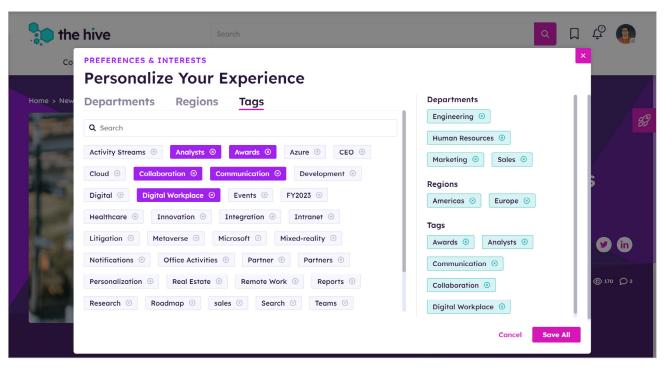


Editing a news story in Akumina.

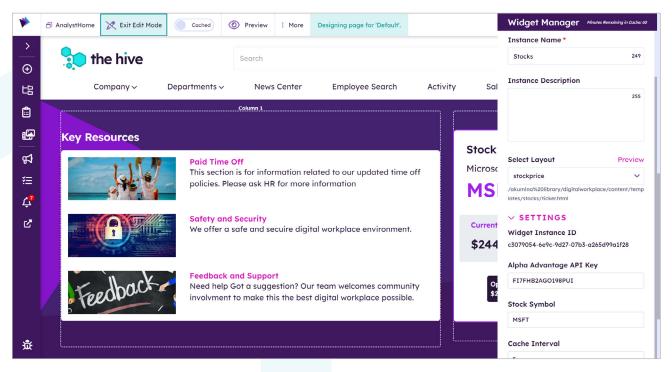


Akumina has an extensive system of tagging and taxonomies to help publishers categorise content. During the creation process, metadata is added by the content author via well-designed and intuitive screens. Users can personalise which content they want to see based on these tags and taxonomies, for instance, they can opt in to see content from other departments or regions than their own.

Managing page layouts and configuring widgets is all done within the same front-end experience. Administrators and authorised editors have the freedom to move widgets around and configure different 'views' of the same content.



Users personalise their content of interest using a system of tags.

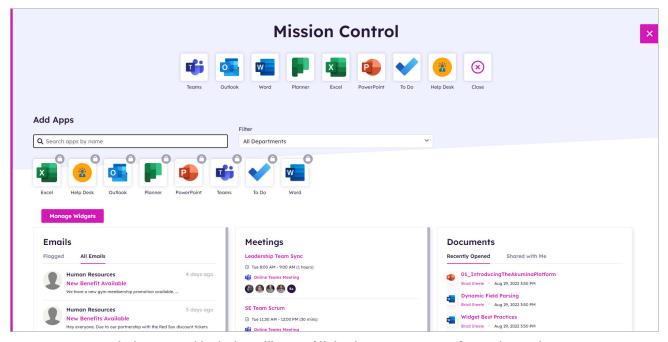


Authorised editors or administrators configure the page layout and the individual widgets on content pages.



# Three approaches to integration

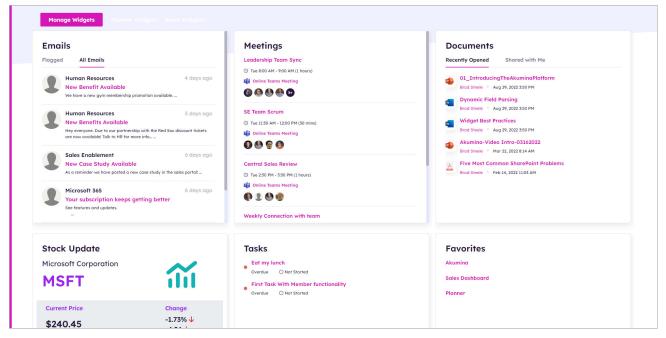
Two-way integrations are an area of strength for Akumina, and businesses can choose the most appropriate approaches for their users. The first approach is through 'Mission Control', which can be accessed via a small, persistent rocket icon that opens a personalised dashboard with a launchpad of icons to the most used systems or tools. The links make use of single sign-on where available, and can point to business tools such as ServiceNow, frequently used pages like the canteen menu, or in-built forms. These icons are configurable, so could be labelled 'ServiceNow' or 'Raise an IT ticket', and core links can be locked in place by admins. Users can then add, remove, or change the order of the icons, with additional icons stored in categories for easy searching and filtering.



Mission Control includes a library of links that users can configure themselves.



There is the option to add other widgets to Mission Control that display personalised content, mainly coming from Microsoft 365 applications. For example, recently opened documents are listed, as well as upcoming meetings, emails and tasks. Mission Control is an effective dashboard to aid people through their day.

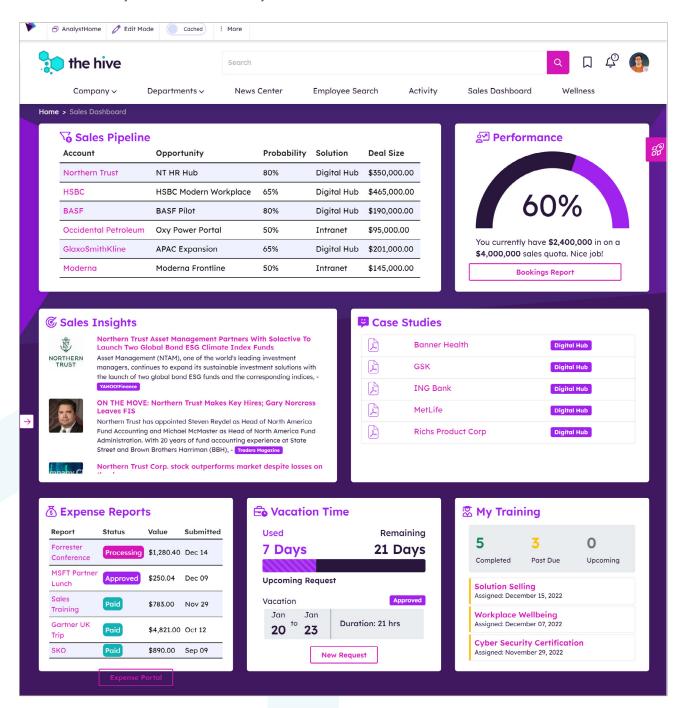


Mission Control also includes personalised content coming from Microsoft 365.



A second approach sees business systems integrated via widgets, providing a more in-depth experience where users can interact with a source system via the Akumina interface. Widgets can display information, such as in the Mission Control example above, or users can interact with their content to complete tasks.

Widgets don't have to be standalone activities either, different widget types can be grouped together to display different content when a user interacts with one. In the sales dashboard shown below, when an account name is clicked in one widget (this integration shows recent opportunities from Salesforce) the associated marketing collateral populates from SharePoint, case studies are populated from OneDrive and a real-time information feed about the selected company is shown. Further down the page, this user can see their expense reports in Expensify and their holiday balance in Workday.

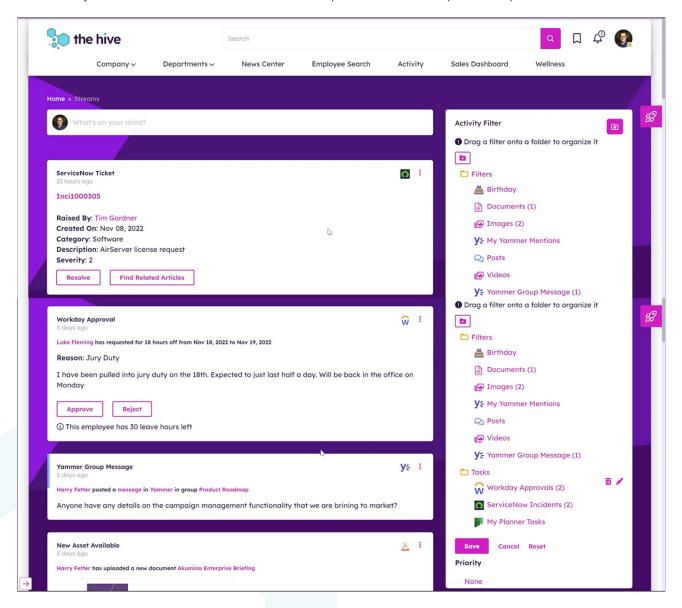


Information in the sales dashboard is dynamically updated when clicking on an account in the pipeline.



A third integration approach is via an 'Intelligent Activity Stream', which gathers content, actions, and notifications from across integrated sources that are presented in 'Stream Cards'. Cards include simple messages, such as 'a new video has been added to a YouTube channel', or more in-depth capabilities, such as the user needing to approve an expense request. 'Streams' has an infinite-scroll experience for each user and a 'splash' of most recent Cards can be added to a home page.

An activity filter accompanies the feed and collates integrated systems into categories assigned by the user. Some feeds can be locked, with users automatically subscribed, while users may activate or deactivate others. For example, MS Teams notifications may be locked as mandatory while YouTube notifications set as optional based on personal preference.



Cards of actions and information in the activity feed and the associated activity filter.

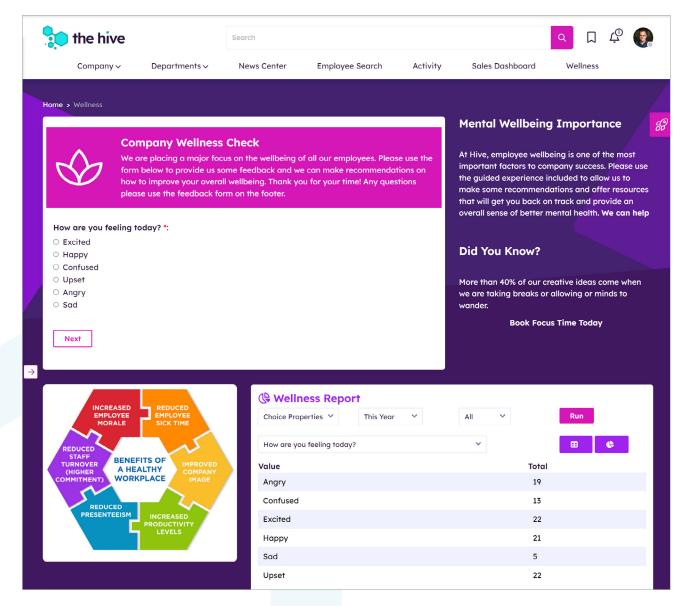


# Flow engine for wellbeing and onboarding

Akumina Flow is a traditional workflow tool combined with a micro-application and processing engine. It gives admins step planning and form building tools to combine with widgets or pages of content, which seamlessly progresses people through content based on decisions they make.

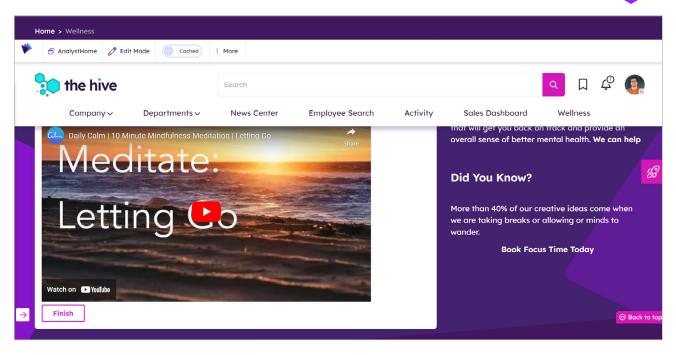
As an example, Akumina showed us a simple wellbeing flow. On a content page in the Wellbeing section, a widget presents a simple poll that asks, 'how are you feeling today?'. People are encouraged to complete the poll as frequently as they can, but the poll is restricted to once a day at most. Users click on their chosen answer and are presented with the next step depending on their response.

An 'excited' or 'happy' response could encourage them to browse a discussion board and get involved in a discussion with a colleague. 'Confused' could show a meditation video to help them refocus. 'Upset', 'angry' and 'sad' may then ask a qualifying question, as to whether it is work related or not. If related to a feeling of being under-trained, the flow could present a list of relevant courses coming from an integrated Learning Management System.



The wellness check starts with a simple poll; authorised HR managers also see a wellness report.

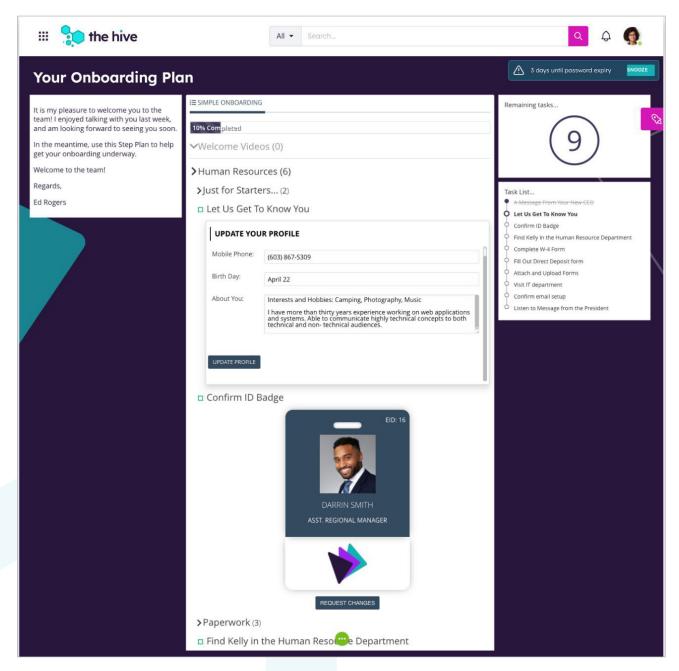




When a user selects 'confused' they are presented with a meditation video to help them clear their mind.



Another example is onboarding an individual into the business, which can be targeted to 'new starter' Personas. The flow mechanism is positioned within a dedicated workspace with connected widgets that display only once a step is complete. Steps could include watching a video from the CEO, completing profile information, visiting their department's site on the intranet, and configuring their 'Mission Control' board. The steps can be time limited, to stop people racing through and missing things, and their manager optionally receives updates as they complete tasks.



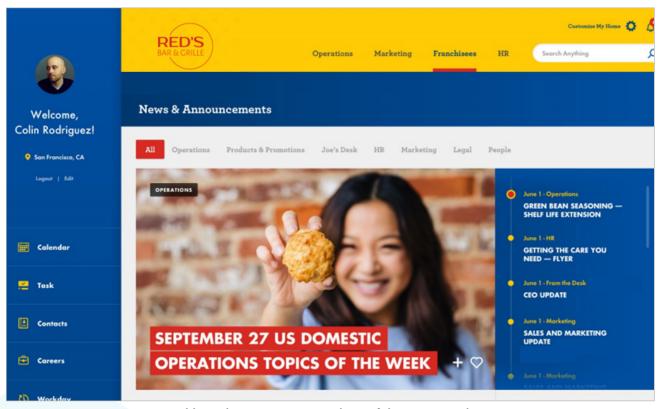
Taking new employees through a number of onboarding steps.



# Extranet and portal functionality

Akumina includes functionality that allows customers to extend their corporate intranet into an extranet or portal targeted at broader audiences. External users will be able to register on the extranet, and after approval they will get access to a separate environment where they can read relevant news articles, collaborate in workspaces, download media files and follow online training.

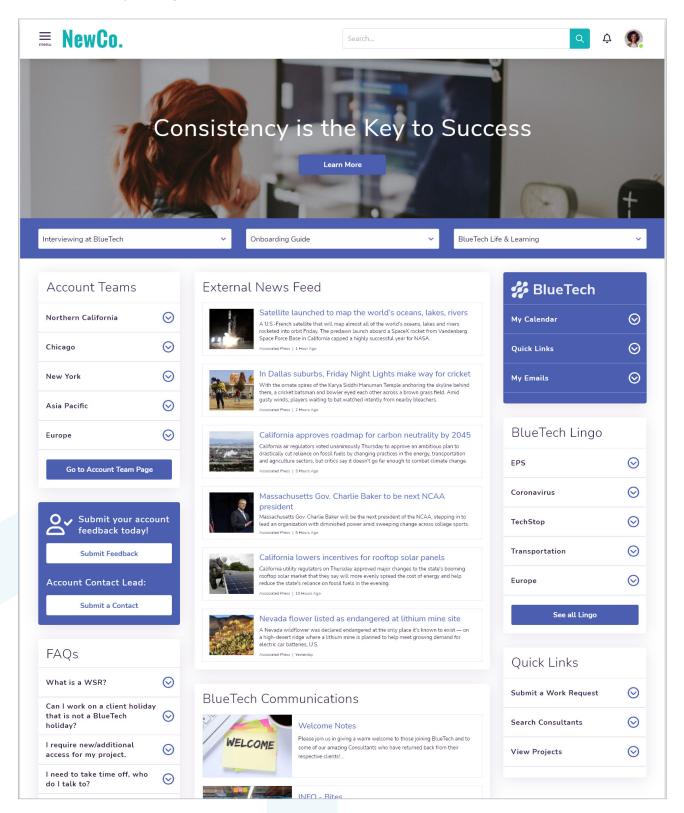
We were shown some compelling examples of how this functionality supports different use cases for a range of organisations. A first example is that of a franchise model in the restaurant business. While employees of the franchising organisation have access to an Akumina-based intranet, independently owned franchisees can also login to a subsection of the intranet that contains information relevant for them.



Franchisees have access to a subset of the corporate intranet and to a dedicated area with targeted information.



The second example is that of a global consulting firm staffing projects with internal employees as well as independent consultants. In this example, the consultants and customers for key accounts have access to a separate portal that reuses many of the widgets and content from the main corporate intranet, but also includes project-specific information for each client and their corresponding account teams and consultants.



The reseller portal reuses many widgets from the corporate intranet but applies a different design.



# THINGS TO BEAR IN MIND

Akumina has grown and evolved over the years into a rich and highly flexible offering. More than other products in this report, Akumina is a powerful platform that integrates in different ways with a host of external applications. Some technical skills or assistance from an Akumina partner will be needed to make the most of the various capabilities, however.

Administration screens have improved in some areas, such as the new front-end interface for creating and managing content, which we find appealing. In other areas, the admin screens aren't as intuitive and would benefit from a similar overhaul. In particular the Akumina Flow module is complex and has a steep learning curve; Akumina says that a redesign of this area is on the product roadmap for early 2023.

Analytics is one of the few functional areas within the product where richer functionality could be offered out of the box. While we appreciate that different customers have different analytical desires, we feel that a better starting point would be beneficial and give admins more choice.

For end-users Akumina offers a sophisticated and considered intranet experience, but for those less digitally savvy it threatens to feel overwhelming. Careful planning is needed (more than with other, simpler products) to introduce the right features on offer, rather than all of them. For less mature and less complex customers, Akumina has an out-of-the-box offering that allows them to get up and running quickly.

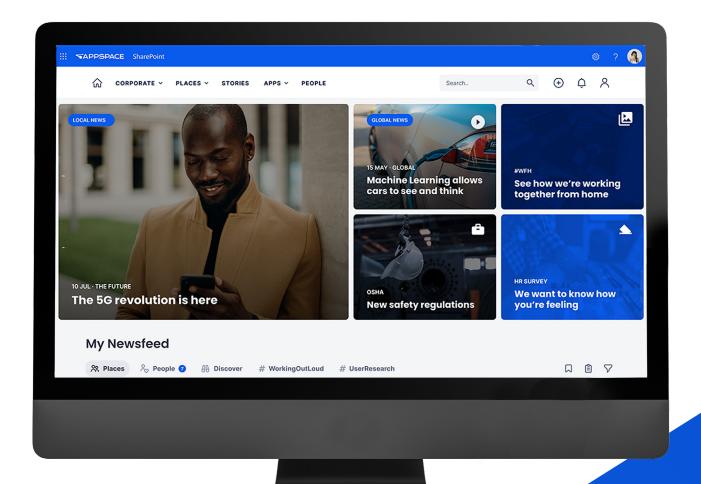
Customers choosing Akumina must have Microsoft 365 in place, as it relies on Graph and other elements in order to work. However, customers can choose whether to deploy in the headless (non-SharePoint) or headed modes. This makes Akumina an unusual blend of being an independent intranet with a vastly different experience to SharePoint, while at the same time being dependent on Microsoft. Note though that where SharePoint is used as the page rendering engine (the 'headed' mode) the load times are markedly slower, as the SharePoint framework adds overhead before any content is displayed.

# Why choose this product

Akumina is a versatile platform that is rich in functionality and highly flexible. It allows organisations to integrate with a range of third-party applications, living up to its promise of being the foundation of a full digital workplace. While there is a dependency on SharePoint and Microsoft 365 for some aspects, there is also enough flexibility to push beyond the constraints of SharePoint and create a highly attractive and personalised experience. The product will mainly appeal to large and digitally savvy organisations that have the ambition and the resources to turn Akumina into a true hub for their digital workplace.



# **SAPPSPACE**



# Our view in one tweet

Appspace Intranet, powered by Beezy is a powerful publishing platform and digital workplace hub with rich social collaboration features too @followbeezy.



# Appspace Intranet, powered by Beezy owned by Appspace

Appspace Intranet Powered by Beezy (referred to as 'Appspace Intranet' in this report) has been around as a product since 2013. It is owned by Texas-based Appspace, who purchased Beezy in 2021. Appspace Intranet is a SharePoint intranet in-a-box product, but it completely replaces and significantly improves upon most of the SharePoint user experience for employees, publishers and admins alike. Appspace Intranet brings powerful content editing, branding and digital workplace integration capabilities, supported by rich social collaboration and a decent mobile app.

Communicators and content contributors will be impressed with the easy-to-use page creation and editing tools for publishing news and reference material. Social and community features are fully-featured, with a consistent user interface for adding comments and posts across the product. Other key elements are the flexible third-party application integration framework and the deep integration with other solutions in the Appspace portfolio, especially with the

digital signage product. This makes it straightforward to share Appspace Intranet content to digital screens and kiosks across the workplace.

There are some considerations with its approach, however. For example, standard Microsoft web parts cannot be used alongside Appspace Intranet web parts on the same page and governance tools aren't as extensive as other products in this report. Additionally, Appspace Intranet leverages Microsoft services for search but there is a slightly disjointed experience when people move to the standard Microsoft Search results page.

Its capabilities will be particularly valuable to large and complex global organisations that have invested in Microsoft 365 but find that standard SharePoint falls short of what they need from an intranet. Appspace Intranet isn't cheap, particularly for small organisations, but those that have the resources and budget to integrate it with other applications in their digital workplace, will be able to unlock the full potential of the product.



# Summary table of scenario scores

# NO. SCENARIO/SCORE User experience and visual appeal 1 Mobile and frontline support 2 Internal communication 3 Community and engagement 4 Information finding and knowledge management 6 Admin experience and governance **Analytics** 7 Digital workplace integrations 8 Microsoft 365 integration 10 Wildcard

# **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price per user per month, Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Businesses over 20,000 users, businesses over 250,000 users. Pricing is based on the number of desk workers purchased, for frontline workers pricing is half-price per user. Price includes: Project workshops, training for admins and end users, customer success services, maintenance, product support, branding / theming services, editor manuals, updates & upgrades, choice of modules / add-ons (e.g. digital signage), Microsoft 365 set-up, onboarding user data, access to a community & webinars, consulting services, all new features and releases.

# Key benefits

- The editing environment for creating news articles and reference content is first-class and richly featured.
- Appspace Intranet's leveraging of Microsoft Adaptive Card and Power Automate frameworks is a smart move that makes integration with third-party applications, Teams and the Viva suite more straightforward than going it alone.
- Social and community tools are fully featured and well-integrated with other content types.
- The mobile app can be custom branded and provides access to all intranet content and features.
- The integration with Appspace's digital signage solution makes it straightforward to share content across both platforms.

# Improvements and considerations

- Appspace Intranet is one of the more expensive SharePoint products in this report.
- Search relies heavily on the standard functionality of Microsoft Search, which has its advantages, but can lead to a slightly disjointed user experience that is different from the rest of the product.
- Appspace Intranet pages replace standard SharePoint pages, meaning that out-of-the-box
   SharePoint web parts cannot be used alongside Appspace Intranet widgets on the same page.
- · Governance and life cycle tools aren't as fully featured as other products in this report.



# Product type



# **Branding opportunities**

All branding, complex options

# Target businesses



**SMALL** less than 1,000 people



MEDIUM 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems



Fully standalone



Requires SharePoint



Optionally works with SharePoint



Other

# **Sectors**



Environment and agriculture



Law, law enforcement and security



Accountancy, banking and finance



Retail



Engineering and manufacturing

# You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



#### Company Appspace



# Company founded

2002



#### Company locations

Dallas, TX, USA (HQ), Canada, Malaysia, Spain, United Arab Emirates, UK



ISO 27001 certified

Yes



Typical client size 10,000-50,000 employees



# Largest deployment so far

250,000 users across 64 countries



#### Partner locations

Appspace maintains a strong network of implementation partners and has global coverage. Countries of key partners include the USA, Canada, Australia, Singapore, South Africa, and full coverage across Europe.



#### Customers

Clients include: Bank of England, Glencore, Hilti, Mattress Firm, Monster, Nordic Consulting and Sika. Please see their website for more.

## Product and technical details

Name of product	Appspace Intranet, powered by Beezy
Product launched	2013
Current version	4.7
Accessibility	WCAG 2.1 compliant





#### Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant

Other

#### Data residency

Appspace Intranet resides in the customer's Office 365 tenant and chosen data centres. This means whether customers chose Dublin, Zurich, or even the USA, leveraging Microsoft GCC high (secure) cloud, Appspace Intranet lives in the customers' chosen data centres.

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active
Directory

ADFS

Open ID

Oauth

G Suite

Other\*

#### Search technology

Apache Lucene/ Solr

Apache Lucene/ Elastic Microsoft

Vendor's own

Other\*

### Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

#### SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

#### Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other



<sup>\*</sup> MSAL. Support all M365 support SSO products and methods such as Okta.

<sup>\*</sup> Appspace's own technology

#### **Reverse-out options**

The customer owns the installation and the data. The end of a contract marks the time when the system is no longer accessible to regular users. However, customers still keep their data, and they can migrate it out of the system via database or the Appspace API.

#### Languages supported

Appspace Intranet supports all languages <u>supported by SharePoint</u>, with the number being 50 at the time of writing.

#### Machine translation

Yes - via the product.

#### Right to left script

Partly in the product interface but some customisation is required.

# Set-up and support

#### Set-up process for new clients

Appspace Intranet is a simple setup and configuration process. A single PowerShell script installation creates all the necessary resources in Azure and frontend files in SharePoint. At the same time, Appspace's CSM team engages their customers with their 'success framework' and playbook that helps get the platform ready for launch.

#### **Product updates**

Four major releases a year, once per quarter.

#### Product update process

Appspace notifies customers via a newsletter that a new release is available in their portal. Customers can then download the package and upgrade their environment at their own convenience.

#### Technical support

Appspace Customer Care provides support services via phone, chat, and their online Account Management Portal. Customer Care Support is delivered by Engineers located throughout the globe including in the Americas, the UK, Netherlands, Spain, Dubai, and Malaysia. The Appspace Customer Care Support resources are available during regular business hours across those time zones.

#### User community

Appspace has an active online community (Beezy Customers Club Broadcast) where customers share best practices, access technical information, and interact with Appspace product management. They also run quarterly webinars with all customers and host various other events throughout the year, including their annual user conference, Appspace BEYOND. Appspace also recently held its Customer Advisory Council (CAC), an in-person gathering of customers who provided insights into their business opportunities and challenges and how the Appspace platform can help them meet their objectives.



#### In their own words

Appspace says: "Appspace Intranet is the all-in-one intelligent digital workplace, built for the Microsoft platform and designed to power the best possible employee experience. With its industry-leading user interface and branding flexibility, Appspace Intranet delivers personalized communication, improved collaboration, and knowledge management. Appspace Intranet integrates with the key apps and systems your business relies on, connecting people to the information and processes they need to do their best work."

# Their view of the marketplace

Appspace says: "The digital employee experience is a driving factor in productivity, engagement, and retention, especially in a largely remote and hybrid world. Leading organizations are making their digital workplace a core part of their culture, embracing it across the entire organization to improve how they communicate, collaborate, and share knowledge. The right digital workplace makes it easy to engage with desk-based and deskless workers across a common, accessible platform, and deliver the personalized experience employees crave. Appspace Intranet delivers on these needs and solves the traditional intranet challenges related to localization, security, scalability, administration, and flexibility."

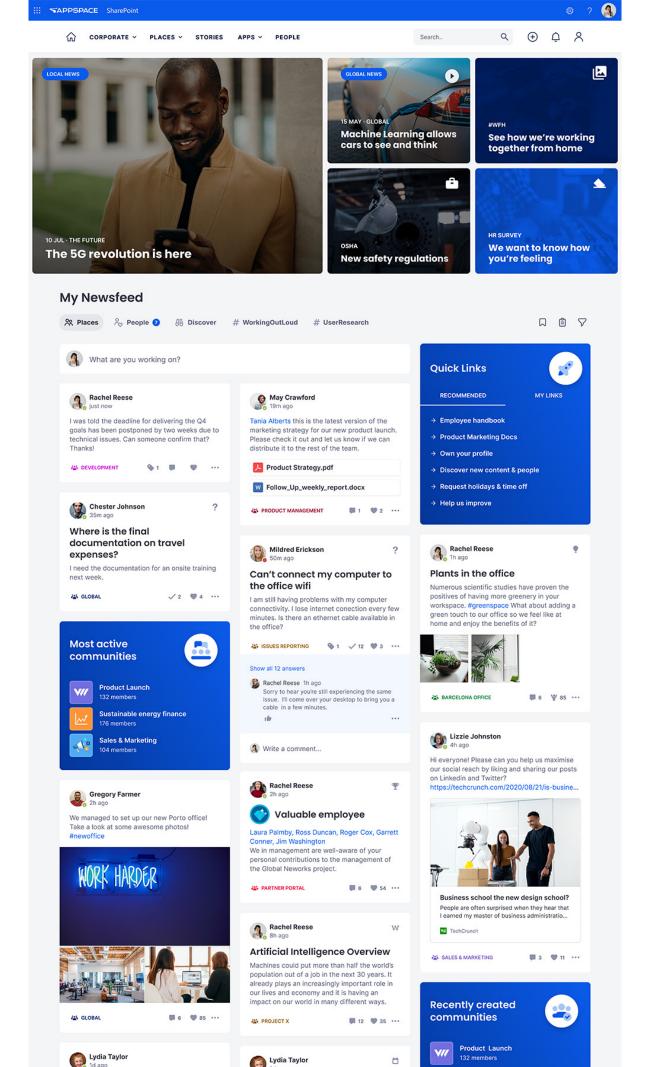
### Voice of the customer

Customers praised the product for its ease of use for both editors and employees with one summarising, "it's very intuitive as a user and creator", while another enthused, "our editors are very happy with the backend, which is simple and user friendly". Another customer praised Appspace Intranet's features for large organisations, sharing, "the local / global content management is one of the best I've seen in any intranet product".

Each customer had their own preference for changes. One wanted, "an easier way to restrict content" saying they had to wait 24 hours for sync with Active Directory (Appspace noted there is a manual job that will trigger this). Another wanted better mobile support for community posts, while a third wanted to be able to make bulk changes to content ownership. One customer summed up with a fairly common theme across many products saying they wanted "less new features and less features in general, focus on the core. Less bugs with software updates".

When it comes to working with Appspace, customers are very happy, describing them as "amazing", "outstanding", "superb" and "excellent". Speaking of their Customer Success Manager, one explained, "they provided outstanding support and expertise throughout their time" working together. Another customer felt they have, "a real focus on providing solutions and a very open and friendly team". The acquisition of Beezy by Appspace does not appear to have harmed things either, with one customer sharing, "we have had an amazing level of support from the team at Beezy from day one and have also seen this expand now that they are a part of Appspace".





# REVIEW

# 1. User experience and visual appeal

score 4+ Appspace Intranet's user experience is superb, particularly amongst products built on SharePoint. Aside from the SharePoint ribbon at the top, the experience is completely controlled by Appspace Intranet and is much improved from modern SharePoint on both the employee and publisher side. Appspace Intranet provides an attractive and intuitive interface that delivers a personalised blend of news, community content and tasks via a card-based timeline on the

home page. Publishers too have a modern and powerful set of tools inspired by the best of what's available on public-facing websites.

The resulting interface deviates more from the standard SharePoint look-and-feel than other SharePoint-based products, however. We believe that these enhancements are attractive, but they may not appeal to people that have grown used to standard SharePoint. In particular, the transition from Appspace Intranet to SharePoint search or other standard SharePoint pages can be quite disorientating at first.

Navigation across the product is handled through a highly configurable mega menu. Different menus can be configured per organisational entity (market, business unit, sub-brand etc). Menu items can be targeted by audience and can include image 'link tiles' alongside text. The 'Apps' menu provides links to third-party apps and can be customised by employees with favourites, while the 'Places' menu is personalised to the employee based on their community memberships.

Notifications are shown via the 'bell' icon and have some UI improvements that deliver a good user experience. Clicking on a notification opens a card where you can immediately act on the notification, and then move to the next (or the previous) card without leaving the interface.

Branding in Appspace Intranet is flexible and powerful, if a little involved due to the way it works with SharePoint; Appspace manages the look and feel of the navigation and footer on behalf of the client so that any changes Microsoft makes to SharePoint have no impact. However, the client has direct control over the navigation and footer content. Many of the visual elements such as buttons can be styled to the client's liking, along with typography and brand colours. Multi-brand intranets are well supported; each entity can have its own brand treatment or theme, giving it a completely different visual identity while still being part of the global intranet. International multi-brand groups or companies that grow through acquisitions will find this feature appealing.



# 2. Mobile and frontline support

score 3.5

Appspace Intranet comes with mobile apps for iOS and Android. These can be downloaded from public app stores or distributed via most MDM platforms, with the latter giving the added benefit of custom app branding. Most employees will log in using their Microsoft 365 credentials, but Appspace Intranet can also support QR code-based enrolment for frontline workers without Microsoft licenses. Device biometrics can be used for access after initial setup.

The mobile user experience feels intuitive and very similar in style to consumer-oriented apps. Icons at the bottom of the screen cover the most used features: news ('Stories' in Appspace Intranet), social newsfeed, search and notifications. A hamburger menu gives access to the full navigation as would be seen on the desktop.

All content and functionality of the desktop version is available within the app, but access to features such as the social network ('Newsfeed') can be restricted based on the audience if needed. Stories can be commented and liked, and new content posted in the newsfeed along with @mentions and attachments. Content and people search is particularly well-implemented – please see the Highlights section for more details.

The mobile app does not include dedicated functionality for frontline workers, in addition to what is available in the desktop version. However, the desktop version supports a kiosk mode where Appspace Intranet can be made available in common areas on a shared computer. Frontline workers, including those without a M365 licence, can browse the site and access content in read-only mode. When they want to interact with the content, they will be requested to sign in.

# 3. Internal communication

score 4+ Appspace Intranet provides a set of content authoring and publishing tools that is sure to delight writers and editors alike. 'Stories' provides a feature-rich news creation interface that takes inspiration from websites such as LinkedIn and Medium, providing a clean and modern experience that helps authors make great-looking articles. Reference content, called 'Pages' in Appspace Intranet, uses the same simple editing interface with additional options for content life

cycle management.

The content editor is powerful and intuitive at the same time. Sensibly, it provides a tightly controlled set of text styles to improve the overall look of the page. Images, video and files are straightforward to embed and have well-designed options for placement in relation to the text. Content from other applications, such as a Power BI dashboard, is also easy to embed. Content targeting uses a flexible combination of channels and audiences that are set up by administrators; see the Highlights section for more about audience targeting.

An editorial dashboard shows the status of all news articles. There is also a Kanban-style overview, with drag-and-drop capability to move articles to the next stage in their life cycle. Articles marked 'featured' are shown in one of the available 'hero' panes on the home page.

Urgent or crisis communications are handled with targeted 'Announcements'. These can take the form of a ribbon at the top of the hero widget, or, what Appspace calls a 'banner'. The banner



takes over the whole screen on all devices with a modal overlay that has to be acknowledged before you can move on to other tasks. In either case there is headline and description text with an optional link to a page of further information.

There is no feature to create an email newsletter (Appspace are planning to release one early 2023) but there is a mechanism to create a personalised daily digest email with an employee's activities and notifications, either across the entire product or for a particular community. A simple employee advocacy feature allows publishers to complete a form that creates a card in the newsfeed to encourage employees to share externally published stories with their networks on LinkedIn, Twitter, etc. When employees click the 'Share' button it creates a post on the desired network pre-filled with suggested text, hashtags, and links.

There is a broad integration with Appspace for pushing Intranet content onto digital signage screens; more about this in Scenario 10. Appspace Intranet also works together with other partners who will leverage the API of the product.

# 4. Community and engagement

SCORE 4+

Community and engagement are a core part of the Appspace Intranet experience. The product has its own fully featured community spaces for social collaboration, although these can be replaced by Yammer if preferred. Communities can be open or closed and community admins choose whether content needs to be moderated, lending them to multiple use cases such as projects, communities of practice, ideation or employee resource groups.

Features include areas to store documents, display a common calendar, run polls, and share ideas. Community owners can brand and tailor the community with different features to meet their needs. There is a 'new community request' process, which includes good governance that checks whether a similar name does not already exist.

Items in the 'My Newsfeed' activity stream are presented as cards that encourage interaction. Likes, comments and shares for news and other content are well-integrated and reactions can be configured to client needs (beyond 'likes'). A nice feature is the comprehensive and configurable 'Share' box where people can start a discussion, create a poll, give praise to a colleague, or write a blog post in any of the communities they have access to.

Several of the Appspace Intranet features, such as communities or people recognition, can be used as people-oriented features in support of employee wellbeing. The product does not include any particular templates to facilitate this, but Appspace Intranet can integrate Microsoft Viva Insight cards into the hero widget on the home page. Appspace Intranet can also integrate digital signage content celebrating birthdays and service milestones from Appspace into the hero widget.



# 5. Information finding and knowledge management

SCORE 3+

Content search is powered by Microsoft Search with Appspace Intranet enhancements, such as an improved, type-ahead search dropdown called 'spotlight'. This feature allows people to quickly find people, content (including from third-party apps connected to Microsoft Search as discussed in Scenario 8), activities or places with results appearing as they type. Hitting 'enter' brings up the standard Microsoft Search results page, with tabs for

Appspace Intranet content types such as 'Stories', and 'Pages'.

This approach is different from most other products in this report, and the user experience may feel disjointed to end users; Microsoft modern search result listings look positively ordinary compared with most Appspace Intranet content. Search management for synonyms and promoted results or 'best bets' are managed via Microsoft's Search administration interface as well.

Finding people uses the same search mechanism and indexes the full profile, so you can search based on all relevant information including department, location, and skills. Each employee has a well-designed profile page showing all relevant content relating to the person, including their activity stream, community memberships and peer-awarded endorsements. There is no organogram, however.

Appspace Intranet helps organise knowledge in a couple of ways. Reference material, such as an employee handbook or policies, is stored in 'Pages' that are tagged with metadata. These are then matched to an employee's subscriptions, which are a mixture of mandatory and optional tags. When an employee goes to the pages section, they see a filtered list of content grouped by topic that should be applicable to them. Alternatively, they can select additional topic tags from a list to filter results further. A dedicated 'Pages' search provides an alternative way of finding reference material.

Appspace Intranet also offers 'Sites' as a traditional, hierarchical way to organise content relating to a specific business area or topic. Finally, there is a Knowledge Centre template. This is based on a community (see Scenario 4) and adds a structured taxonomy that can be used to tag and filter content, while removing social features such as sharing posts and updates. There are no page templates, such as for an FAQ, to present complex information simply.

# 6. Admin experience and governance

SCORE 3.5

Most administrative tasks can be completed through Appspace Intranet's intuitive interface, but some global configuration elements have to be accessed through SharePoint's Site Settings menu. Appspace Intranet is a richly featured product so the admin options are extensive, and we think it would be useful to be able to search for an option when you can't find it in the menu. Global admins can set up local entities and delegate some configuration and design elements

to local admins, reducing the burden on central teams.

The home page has a number of 'hero' layout options to choose from, providing a blend of global and local stories and other featured content. Control of these can be delegated to local entities. The newsfeed element can also be configured in a number of ways. At page level there is good granularity of publishing roles for news and static content including controls over the look and feel of their content.



Pages and Stories have overview pages with filters to show content status, but other products have more comprehensive reporting around governance. 'Pages' for reference content have review and archive processes, with the owner getting a notification when content is approaching its review date. News content does not have an expiry date.

Multiple languages are handled well, with draft machine translation for published content and workflows to check the result before publication. For social content, an automated translation feature is integrated into the widgets, so a comment in another language can be translated on the fly.

# 7. Analytics

**SCORF** 

Appspace Intranet includes a standard set of analytics dashboards using PowerBI. These provide usage reporting around published content, communities and people. Microsoft's Clarity is also available for real-time insights and more detailed behaviour analysis with tools such as heatmaps. The result is an intuitive, well-structured, and comprehensive set of dashboards about various aspects of the product. Some provide a high-level

overview of platform usage, while others give more detailed insights through clickable assets, for instance about the success of Appspace Intranet Stories or the social interactions with the various types of content.

Communicators will like the ability to see which are the most popular stories and be able to refine this information by time period and channel. Stories also show engagement through shares, likes, and comments alongside views. This can't then be broken down by demographic data, however. Pages (reference content) get the same sort of measurement while communities get reporting around followers, membership, types of post and tags used. More detailed reporting can be achieved with third-party tools such as Google Analytics.

Mandatory reads are handled via an 'announcement' banner (see Scenario 3) that takes up the whole screen. It must be dismissed before people can continue their journey but there is no reporting on this as standard.

Search analytics, such as top search terms or searches with no results, is via the standard SharePoint report. As previously mentioned in Scenario 5, Appspace Intranet's approach for search is to leverage the standard functionality of the Microsoft 365 platform.

# 8. Digital workplace integrations

Appspace Intranet includes a framework that enables customers to integrate external applications into the Appspace Intranet experience. The framework is built around Microsoft's Power Automate and Adaptive Cards. Customers use this framework to let the Appspace Intranet connector talk to any other connector within Power Automate and build their own integrations. This can be achieved with technical help from Appspace or an external partner if needed, although note this may be at additional cost.

Transactional integrations with Salesforce, Workday, ServiceNow and ADP have been



implemented and these appear in people's newsfeed as action cards. Cards are personalised to the individual (expenses for example) or for a group of people (such as support tickets) with each card showing who the audience is. Example associated actions could be to approve expenses, approve holiday requests or view a support ticket. These cards are shown both on the desktop and in the mobile experience, so managers can approve requests quickly while they are on the go. There is a useful filter feature at the top of the newsfeed, so action cards linked to a specific service can be displayed while hiding everything else.

Simple integrations can be built quickly as well, such as to show tweets within a community. The integration with the Appspace products is discussed in Scenario 10. Integration with third-party collaboration tools like Slack or with cloud storage services like Dropbox or Google Drive are not a standard part of the product, although some could be achieved using the Power Automate-based framework described above. Starting a chat with a contact via Slack could be substituted for the Teams standard.

Appspace Intranet uses Microsoft Search to connect to third-party services such as Salesforce, ServiceNow and Jira. As such there is some flexibility, but customers are limited to using connectors provided by Microsoft.

# 9. Microsoft 365 integration

score 4.5

Appspace Intranet relies heavily on the Microsoft ecosystem so integration with the Microsoft 365 suite is a strength of the product. There is good integration with a range of SharePoint functionality. Any content stored in SharePoint document libraries can easily be surfaced within the Appspace Intranet experience, and Appspace Intranet news items can be integrated with standard communication sites. Although Appspace Intranet has its own content creation environment with

a different look and feel, this has no adverse effect on the interoperability with standard SharePoint features.

Integration with MS Teams is strong, partly thanks to its use of Microsoft's Adaptive Card framework (described in Scenario 8) that is also a core component of Teams. Integrations include starting a Teams chat session from a people card or from a person's full profile, and Appspace Intranet Stories can be shared into a Teams channel. The full product is also available as a Teams app.

As mentioned in Scenario 4, it is possible to replace Appspace Intranet communities with Yammer or Viva Engage functionality. Community content in the newsfeed will then become Yammer / Engage content, and the 'Share Box' works with these content types as well. This will be an attractive proposition for organisations where Yammer is already widely used.

Appspace Intranet is following the evolution of Microsoft Viva closely and has several integrations available. Viva Connections is used to deliver the intranet within MS Teams. Viva Insights is integrated with Appspace Intranet's hero web part on the home page, enabling employees to take advantage of personalised analytics and suggestions. Viva Learning content integrates with its discover cards. Finally, Appspace is working on integration with Viva Topics so that topic cards and pages can be enhanced with Appspace Intranet-specific content, and its own system of tags and topics can be hooked into Microsoft's Al-powered approach.

Appspace Intranet enables people to create tasks directly in Microsoft To Do or Planner, and then move back and forth between these environments, for instance to take actions within Appspace Intranet on a reminder set in Planner. It makes extensive use of Power Automate and Adaptive Cards as the foundation of its integration framework with third-party applications; see Scenario 8 for details.



# 10. Wildcard

SCORE 3.5

A strong feature of Appspace Intranet is its two-way integration with Appspace's digital signage product, which is included as part of the license costs. The rich set of 'cards' for digital signage screens is available to integrate into Appspace Intranet, for instance as a content pane in the hero web part. Appspace digital signage comes with a library of templates for creating a variety of 'cards', ranging from a simple stock ticker or weather information to more sophisticated

ones such as a sales leaderboard or Power BI dashboard. These cards are configured in the digital signage product and then added into Appspace Intranet, where they are targeted to specific audiences if required.

Going in the other direction, content from the intranet can be displayed via Appspace's digital signage solution. Digital signage customers set up a link with Appspace Intranet and then create digital signage cards that contain content from the intranet. In this way, any particular Appspace Intranet Story or any content published in a specific communication channel within the intranet can be pushed to any Appspace digital signage.

Both types of integration are straightforward to set up and configure; details and screenshots are in the Product Highlights section. Please note that some digital signage devices are included as part of the pricing supplied for this review, but not necessarily all, so you may need discuss your needs with Appspace.

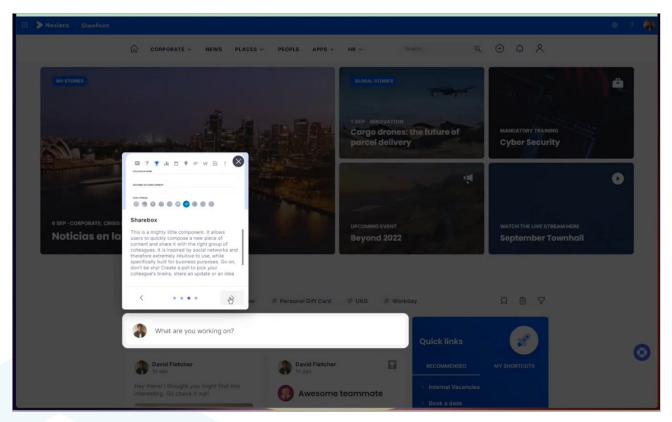
Finally, it's worth highlighting that what constitutes 'digital signage' continues to evolve, with Appspace customers installing the 'Appspace for Devices' app on iOS and Android devices alongside existing smart TVs. These can then be configured to pick up content from a specific Appspace digital signage channel, so simple messages can be easily broadcast to a range of devices.



# PRODUCT HIGHLIGHTS

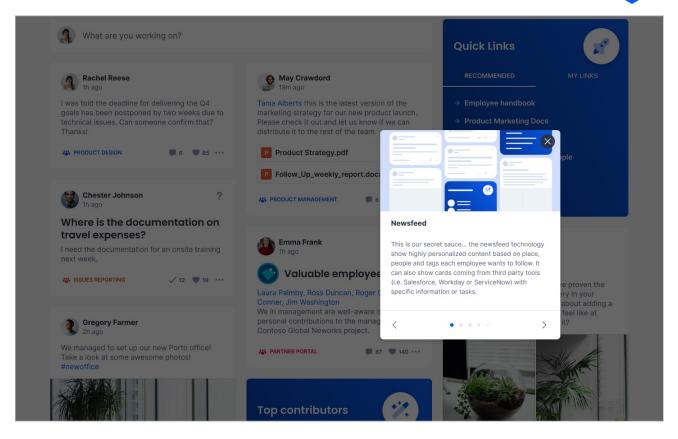
# Driving adoption and maximising usage

Organisations invest heavily in their digital workplace platforms so anything that helps maximise the benefit and value that they can get from them is to be welcomed. Appspace Intranet includes a product walkthrough for all new users that helps to explore and explain the features of this powerful product. This modal overlay steps people through the key features of the product, such as the navigation, the hero web part and the newsfeed, so they understand the purpose and possibilities of each of these components.



The walkthrough explaining how the versatile 'sharebox' works.

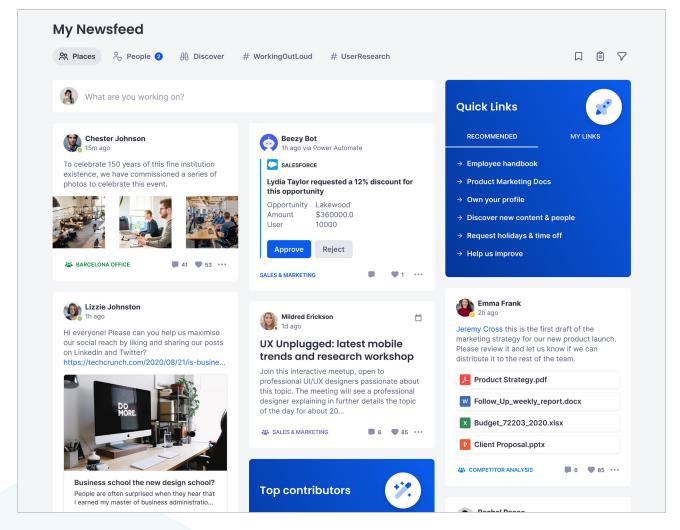




The walkthrough showing what sort of content is in the newsfeed and what you can do with it.



The newsfeed is an important part of the walkthrough, as although the card approach is effective it is also unusual. The newsfeed includes cards showing actions and content, as well as randomly inserted 'discover cards'. The discover cards raise awareness of things like recently created communities, most active communities and colleagues that have been awarded praise. Again, this helps people to get the most from the product and explore features and content that they might not otherwise be aware of.



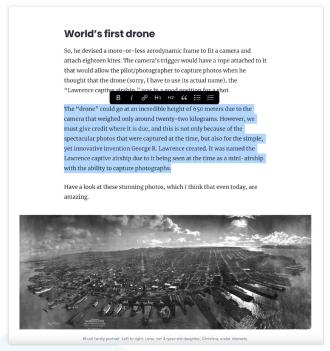
Discover cards help promote features and content that employees may not be aware of.



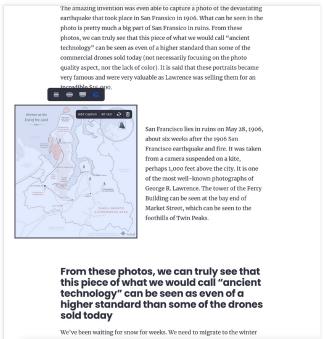
# News article creation and editing

Appspace Intranet news publishing is one of the best content editing experiences currently available for SharePoint. Brand managers and anyone with an eye for design will appreciate the attractive but restrained options for text formatting and styles, so copy looks clean and uncomplicated. The look and feel is very similar to other modern publishing environments such as Medium or LinkedIn articles.

The editor interface comes with powerful features to embed and style various types of content to add interest to articles. The editing controls appear when content is highlighted. For example, when inserting a picture, a control will appear to resize the picture or change how text flows around it (as shown in the screenshot below). Image files are automatically cropped and sized to the placeholder although there are options to adjust how this has been done. The author is prompted to add alt-text as well, which is a nice touch.



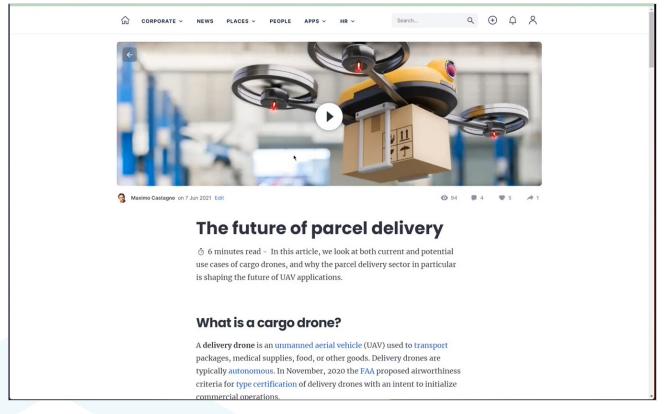
Appspace Intranet's text styling options ensures copy looks good on the page.



Page editor controls set how text flows around pictures.

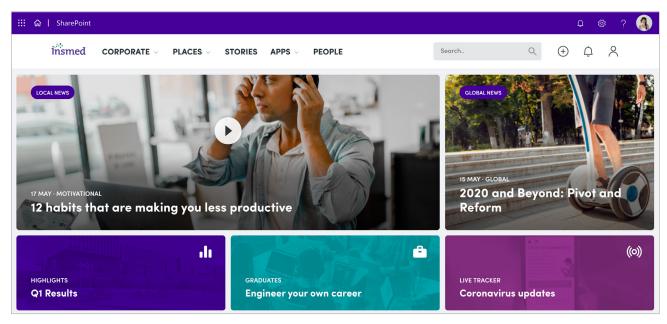
Video is increasingly important in modern communications and Appspace Intranet has good support for platforms including Stream, Kaltura, Brightcove and YouTube. Video Stories showcase this content well with video content prominently displayed and played first when the story is opened, and the video is clicked. The text of the article can be read afterwards by those who are interested in more details. Video Stories are available anywhere across the product and follow the same audience targeting mechanisms as any other article.

News and other content are published in a predefined channel and targeted to specific audiences. Channels are easy to set up through a user-friendly admin interface; they can correspond to departments within the company but also to major projects or campaigns. Audiences can be attached to channels, but there is also the freedom for end users to subscribe to the channels of their interest. The Appspace Intranet home page has an attractive and configurable hero web part where news from the global channel – visible by everyone – sits next to 'local' news based on the employee business unit or location.

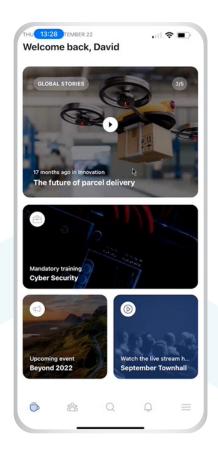


Video Stories focus on video content, with the text of the full story available behind a button.

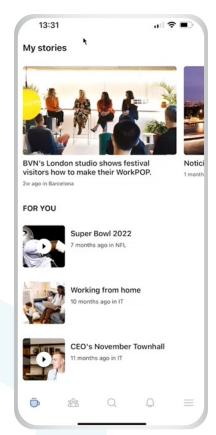




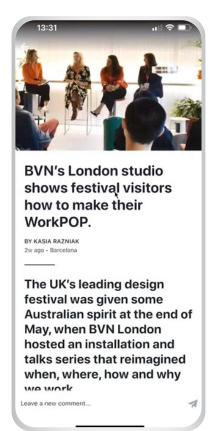
Appspace Intranet home page hero web part showing 'Global' and 'local' (My Stories) content above the personalised newsfeed. Note also the 'play' (right arrow) icon denoting Video Stories.



The Appspace Intranet hero web part on the mobile app.



Stories on the mobile app gives the same targeted experience as desktop.

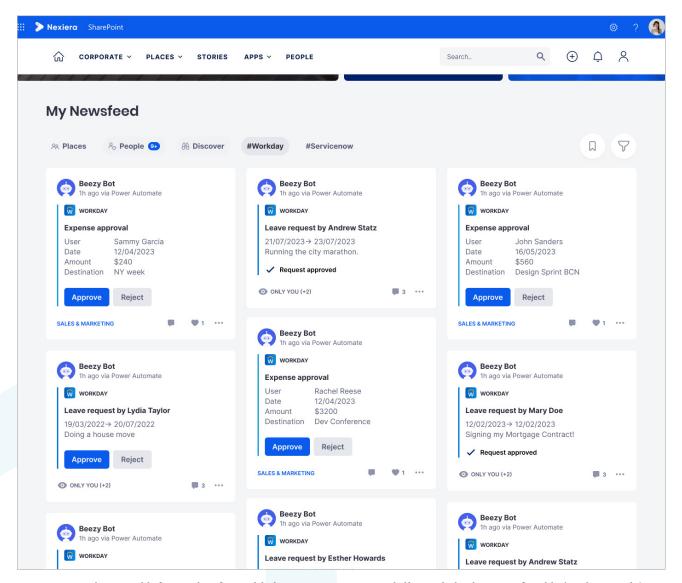


Articles on mobile can be commented on as well as 'liked'.



# Digital workplace integration

The potential to integrate Appspace Intranet with other systems, and then deliver workflow capabilities within the Appspace Intranet interface, provides interesting opportunities to develop a digital workplace experience for users. Appspace Intranet leverages Microsoft Power Automate and the Appspace ecosystem to connect with third-party systems and interactively conduct transactions. These transactions and associated information are delivered as 'action cards' in the newsfeed alongside other content but stand out thanks to their buttons. Notifications on desktop and mobile also ensure they don't get missed. Action cards are automatically tagged according to the business process that they serve, which makes it easy to find them again in case they have disappeared from the top of the list. For example, by filtering the newsfeed for the tag 'Expense approval', a manager can find all pending approvals.



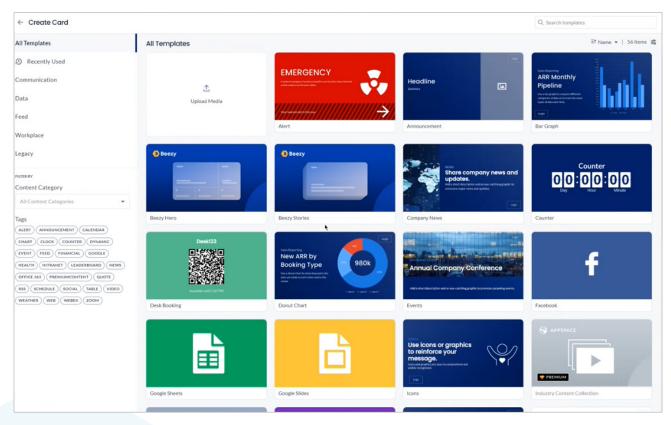
Transactions and information from third-party systems are delivered via the newsfeed in 'action cards'.

In this view, the newsfeed has been filtered to show only third-party integrations.

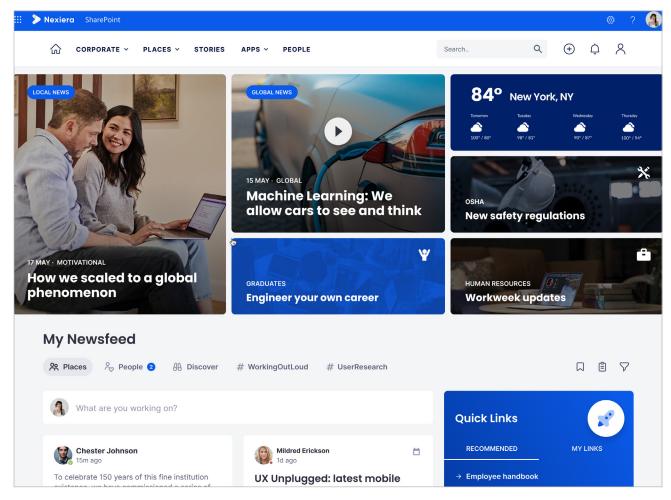


Appspace (the vendor) has a digital signage product in addition to Appspace Intranet and they have created integrations between the two. This makes it possible to display Appspace digital signage content within Appspace Intranet, and to show intranet content on Appspace digital signage screens.

The screenshot below illustrates the rich set of templates that are available for digital signage content; each screen of content is called a 'card'. Originally designed to be used on digital signage screens or kiosks, the cards can now also be shown as part of an Appspace Intranet page. Cards are first configured within the digital signage product and then made available within Appspace Intranet, where they can be used like any native widget. The example used in the screenshots is that of the Appspace 'countdown' card, which has been customised and added to the hero web part on the Intranet home page.



The library of card templates within the Appspace product.

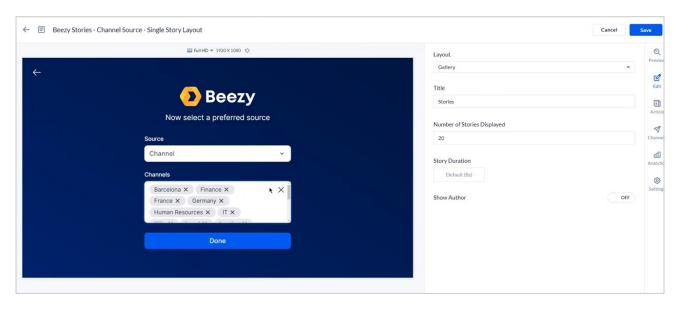


The configured Appspace card appears as a pane in the Appspace Intranet hero web part.

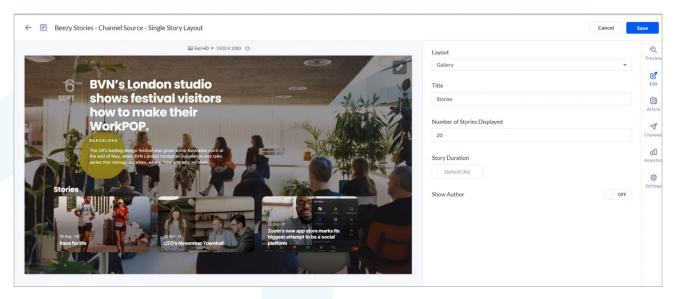


Integration in the other direction, from Appspace Intranet into Appspace's digital signage solution, has also been thoughtfully executed. A news article in the form of a Appspace Intranet Story can easily be pushed to any Appspace digital signage screen. Administrators can go beyond pushing a single content item; they can select one or more Appspace Intranet content channels to have the associated content pushed automatically to selected digital signage screens and kiosks.

The screenshot below illustrates the simple user interface to achieve this. Administrators can select one or more channels from a list and specify some configuration parameters on the right-hand side of the screen.



Administrators select and configure Appspace Intranet channels or stories that will be used to populate Appspace digital signage.



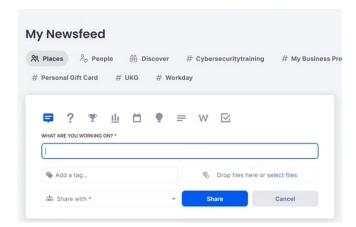
The resulting content from Appspace Intranet previewed as it will appear in an Appspace managed digital screen.



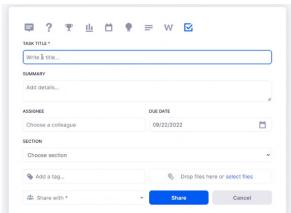
### Social and collaboration features

Appspace Intranet includes a comprehensive range of social features. At the heart of the approach is a versatile 'sharebox'. This lets users post updates, add comments in communities, praise a colleague or post an event. The same interface appears consistently across the platform, most prominently on the home page just below the hero web part, so it encourages people to work out loud and interact with the platform.

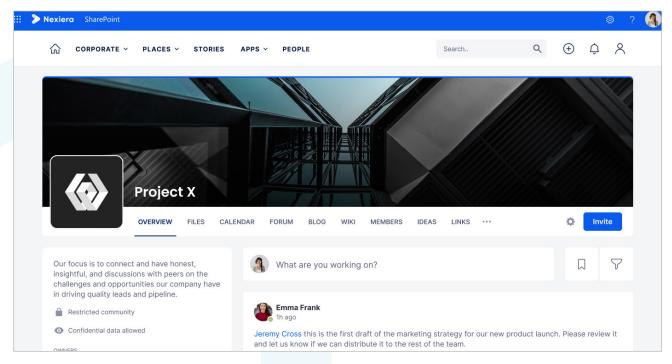
Communities equally offer a wide range of features, which are easy to set up and configure for community owners. An intuitive drag-and-drop interface allows them to add and re-arrange web parts with content such as people, tags, documents, and media galleries. There is a gamification element too; from the sharebox, employees can send praise to their colleagues, and there is a configurable discovery card that shows a list of employees who have received most praise over a given period. For community members the layout is intuitive, with an attractive overview page that focuses on the interactions with other members.



The versatile 'sharebox' is the cornerstone of Appspace Intranet's social tools.



The sharebox is also used to create polls, recognise colleagues and create tasks as shown here.



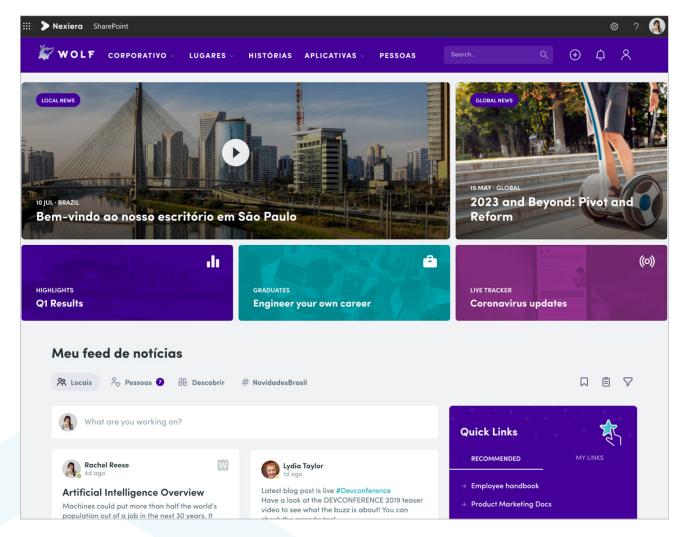
A typical Appspace Intranet community.



# Managing global and local content

Appspace Intranet offers a smart way to allow global and local administrators to share responsibilities over content and governance. The product offers a lot of freedom to local admins while at the same time allowing global admins to keep central control over the global intranet.

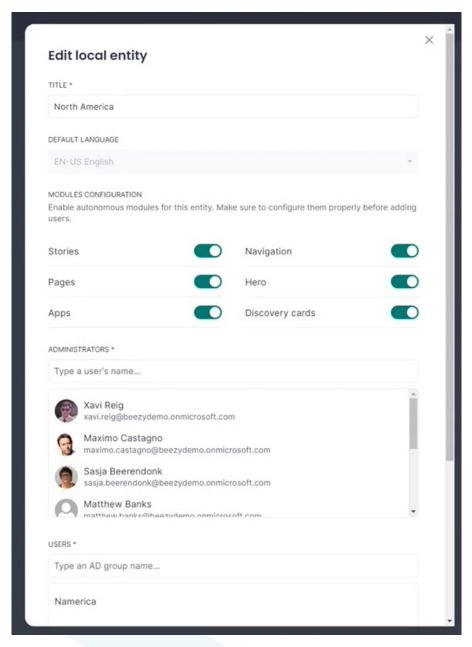
The screenshot below illustrates some of this flexibility. In this example, the local admin of the Brazilian subsidiary has configured Appspace Intranet with its own branding, default language and local navigation menu. At the same time, global admins can still push global content (in English) to specific widgets in the hero web part.



A smart mix of local intranet content (in Portuguese) with globally pushed content (in English).



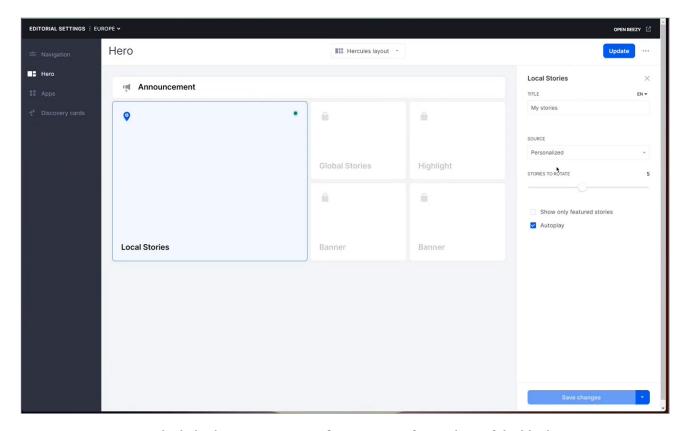
The admin user interface to set up local entities is straightforward and is illustrated in the screenshot below. The global admin can set the default language, decide which product modules need to be included, appoint the local admins, select the AD group containing the end users, and apply a local branding package.



Global admins can easily set up a local entity.



The product includes a mechanism to avoid conflicts between global and local content. Control over the hero web part on the home page can be split between global and local admins. The screenshot below shows how a local admin has access to the announcements banner and to the local stories area, but not to the global stories area, which is greyed out.



Local admins have access to configure content for a subset of the blocks that make up the hero web part; other areas are greyed out.



# **THINGS TO BEAR IN MIND**

Appspace Intranet is primarily designed to provide its own end-to-end user experience, replacing and often improving upon standard SharePoint features. This won't be an issue for organisations that are selecting Appspace Intranet precisely because they prefer, for example, Appspace Intranet Stories as the news experience over communication sites. However, it is different from the approach of some other vendors that provide additional web parts that can be used alongside Microsoft web parts on the same page; this is not possible in Appspace Intranet. We understand that this is a conscious design choice that has a number of advantages, but it may not appeal to everyone. Additionally, Appspace Intranet is one of the more expensive SharePoint products in this report.

To get the full potential from a feature-rich product like Appspace Intranet, some integration work will need to be done. This will be the case to get the most out of the integration framework described in Scenario 8 or to build governance workflows. Appspace says that most of their customers use the product without any customisation. For those that do wish to extend the product, for instance with links into external applications, the ready-made connectors for Power Automate are helpful to speed up the process.

# Why choose this product

Appspace Intranet powered by Beezy will appeal to complex, global organisations that have sophisticated content publishing and digital workplace integration needs. It provides a firstclass content editing and page building experience that will be the envy of many other intranet product providers. Organisations that want to integrate communication and information delivery across digital signage, intranet and mobile should give Appspace Intranet Powered by Beezy a closer look.







# Our view in one tweet

Atlas from @ClearPeople is a high-end add on for SharePoint & Teams that excels as a knowledge and information management tool. It will particularly appeal to document-centric industries such as law firms.



# Atlas Digital Workplace Platform owned by ClearPeople

Atlas was launched in 2019 by UK-based ClearPeople. It sits squarely on top of Microsoft 365 and is legitimately pitched as being a 'digital workplace' platform, rather than just an intranet. Its primary differentiator is the way it can bring coherence across collaboration spaces and content that may be scattered over different Microsoft 365 tools. It also does a good job of enhancing SharePoint as an intranet presentation layer, but given the higher price point this is unlikely to be the only objective potential buyers have in mind.

The way Atlas works is by providing a sophisticated architecture that is based on tagging, to bridge silos using its own 'workspace' capability. Workspaces are rich in metadata, and any content added to a workspace inherits this metadata too. All of this fuels a powerful search-based approach to aggregating information in-context, irrespective of where it is actually stored. Part of Atlas is a governance and provisioning tool called ConneX which makes it much easier to apply workspace consistency.

On the communication side, Atlas also brings the same mindset to creating a highly targeted publishing experience for news, events and resources based on tags. The intranet component embeds well in Teams, and adds a friendlier menu than Viva Connections plus some attractive presentation web parts.

Atlas is ahead of many with its outof-the-box integration with Microsoft
Viva. Of all the products we have seen
ClearPeople have the most advanced
vision for how Viva Topics can be
leveraged effectively. For companies
looking to take a more structured
approach to how they manage
knowledge, govern collaboration spaces,
and ultimately get more from their
Microsoft 365 investment, Atlas offers
some very valuable tools that set it apart
from the competition.

Note: Despite us having similar company names, there is no connection between ClearBox and ClearPeople.



#### Summary table of scenario scores

# NO. SCENARIO/SCORE User experience and visual appeal Mobile and frontline support Internal communication 3 Community and engagement Information finding and knowledge management 5 6 Admin experience and governance 7 **Analytics** 8 Digital workplace integrations 9 Microsoft 365 integration 10 Wildcard

## **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### PRICING MODEL

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, NHS

Price includes: Project workshops, training for admins, training for end users, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / addons, access to online knowledge base, UserVoice ideation forum, Atlas ConneX Studio and Advanced Analytics with tyGraph.

# Key benefits

- Atlas provides one of the most comprehensive and capable platforms for supporting knowledge management processes on top of Microsoft 365.
- The search- and metadata-driven approach is very versatile, and the ConneX governance and workspace provisioning tool is solidly implemented.
- There are some attractive web parts for publishers, including In Focus, which enables users to subscribe to topics, and HoverPoint, which makes it easy to map hotspots to clickable images such as maps and plans.
- People search is considerably improved over Microsoft's offering, in particular the ability to search for experts by skills, location, and department etc.

#### Improvements and considerations

- The mobile experience relies heavily on Microsoft's offering, which is more collaboration-centric than internal communications biased.
- The analytics, based on third-party tool tyGraph, are undoubtedly powerful but some publishers may find the density of data presented intimidating.
- Atlas is capable of some impressive results using Viva Topics, but customers should factor in the additional license cost and hard work needed to curate Topics before launch.
- The price point shown in this review includes tyGraph and ConneX Studio (for templating), but customers can buy Atlas without these to bring the cost down if they wish.



# **Product type**





**SMALL** less than 1,000 people

Target businesses



**MEDIUM** 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# **Branding opportunities**

Simple branding by admins

### Base systems



Fully standalone



Requires SharePoint



Optionally works with SharePoint



Other

#### **Sectors**



banking and finance



Business, consulting and management



**Energy and utilities** 



**Engineering and** manufacturing



Law, law enforcement and security

You may also be interested in...









# **COMPANY AND PRODUCT**

## Company details



Company ClearPeople



Company founded 2003



Company locations

London, UK (HQ), Spain



ISO 27001 certified

Yes



Typical client size 1,000-15,000 employees



Largest deployment so far

15,000 employees, 35 offices in 17 countries



Partner locations

Canada



#### Customers

Clients include: Alzheimer's Society, Bell & Clements, Costain, Gowling WLG, Osborne, Places for People, RNLI, Tokio Marine HC, Weightmans, ZS Consulting.

See success stories for more.

#### Product and technical details

Name of product Atlas Digital Workplace Platform Product launched 2019 **Current version** V4.0 Released September 2022 Accessibility WCAG 2.1 compliant



#### Deployment

#### Data residency

N/A, Atlas sits within the customer M365 tenant so data may reside in any selected M365 data centre location.

#### Client data encrypted

In transit only  In transit and at rest  At rest only	
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#### **Authentication supported**

Azure Active Directory ADFS	Open ID	Oauth	G Suite	Other
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#### Search technology

Apache Lucene/ Solr Apache Lucene/ Microsoft Vendor's own Other*	*
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<sup>\*</sup> Option to use BA Insight (extra cost) and other search engines such as Elastic and Solr.

#### Document library sources integrated

Box D	ropbox Google Drive	SharePoint	OneDrive	Other*
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<sup>\*</sup> Atlas also connects to Microsoft Search connectors and BA Insight Smart Hub, which means that the customer can also connect to other document services including Box, Dropbox, Google Drive, NetDocuments etc.

#### SharePoint/0365 versions supported (if applicable)

	•			
SP Server 2016	SP Server 2019	SP Server Subscription Edition	SP Online	Viva Connections
Mobile app depl	loyment			
Google Play store	Apple store	MDM	MAM	Other*

<sup>\*</sup> Uses native Microsoft Team and SharePoint apps.



#### Reverse-out options

As all client data resides within the clients M365 tenant, all data is retained. The client simply loses the license to use any Atlas components.

#### Languages supported

English, French, Spanish, German, Dutch, Portuguese, Italian, Russian, Chinese (Simplified), Chinese (Traditional)

#### Machine translation

Not via the product - it's whatever the browser/base system does.

#### Right to left script

Partially - this is supported for end users as is supported in SharePoint but in the Atlas components used by admins this is not currently supported.

#### Set-up and support

#### Set-up process for new clients

An Atlas deployment package is provided to the customer along with a runbook. An installation typically takes 3 hours or so.

#### **Product updates**

Four releases per year, approximately once every 3 months.

#### Product update process

Each client is provided a deployment package that they can run in their own time with a runbook. The client can choose when to run the release updates (must be at least once per year).

#### Technical support

All support is currently supplied by ClearPeople during UK office hours, with online ticketing systems and a comprehensive knowledge base available all day, every day.

#### **User community**

ClearPeople provide their user community with access to their UserVoice service, where clients can share and promote their ideas for product improvements and also vote on others from other clients.



#### In their own words

ClearPeople says: "Deeply embedded with Microsoft 365, Atlas is a Digital Workplace and Intranet Platform that connects people to what matters most at work. In a single and intuitive interface Atlas connects the digital tools, information, and knowledge that people need to do their best work. Atlas solves today's working problems - dispersed knowledge, having too many digital tools, too many silos and stuff that's too hard to find ultimately increasing productivity, ROI, and employee engagement and satisfaction."

#### Their view of the marketplace

ClearPeople says: "Our customers use Atlas to:

- Effectively manage corporate knowledge
- Enable effective hybrid and remote working
- Collaborate securely
- · Find documents, information, experts and applications quickly
- · Getting the most ROI from their Microsoft 365 investment
- Increasing Microsoft 365 adoption."

#### Voice of the customer

Customers really seem to appreciate the integration of Atlas with SharePoint and Teams. One articulated it as "Atlas, as a digital workspace sits within Microsoft 365 and integrates seamlessly with all its applications especially Teams and Viva Connections. Integration with Teams is essential for the hybrid working we have today and makes the user interface simple, clear and improves collaboration".

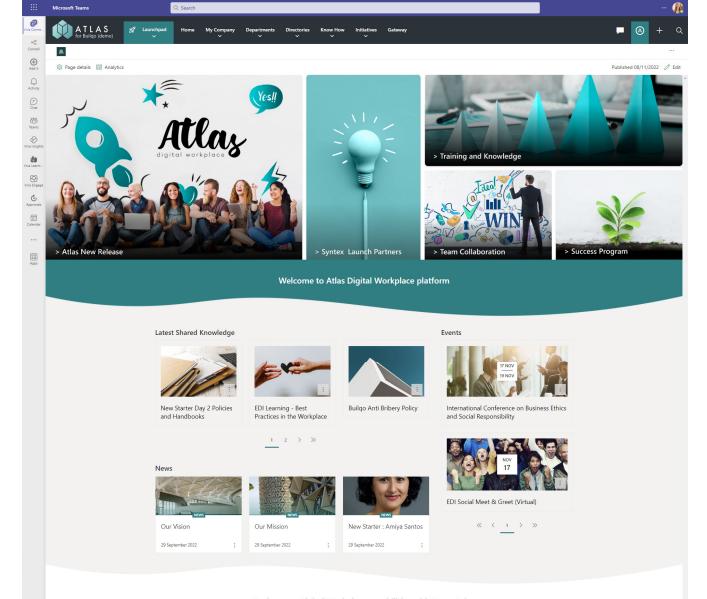
Customers also praised Atlas's flexibility and its approach to supporting collaborative spaces: "Workspaces are easy to create and templates can be produced to provide teams with a starting point set by the business. Personalisation using metadata improves the user experience and provides exactly what they need at the time – the right knowledge, to the right people at the right time."

Another put it as "it brings content together (regardless of whether it is a document, an item, a page, external resource) rather than having to build multiple links and managing manual updates... It has enabled my organisation to move from an IT controlled comms and document management solution, to an immersive, user-led application that brings most of our data to one place".

Regarding improvements, several customers said they'd like more document management capabilities, probably reflecting that Atlas tends to attract users with high-end requirements in the first place. Although one customer felt the mobile experience was good, another asked for a "better experience on the Teams app – so it doesn't open in a browser and can continue as an in-app experience". Another suggested "improved event management".

Atlas customers were fulsome in their praise for the service they received. "Fantastic. 10/10 - just wish all suppliers were like ClearPeople" and "Excellent team. Customer success manager supported from day 1 until after go-live. All in all brilliant team. A+ to the delivery team"; "Being successful with a product introduction and adoption relies on a great working partnership with vendors. The whole Team at ClearPeople have been fantastic". A further highlight was customers saying that ClearPeople take on board suggestions "vendor is excellent, great communication, excellent support and always there to take feedback. They truly understand customer experience and deliver fantastic support".





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# **REVIEW**

# 1. User experience and visual appeal

SCORE 3.5

Atlas' user interface stays faithful to the Microsoft styling, and as such is clean and modern-looking. It works equally well as an app within MS Teams and as a browser-based experience. ClearPeople have added their own web parts to give more versatility to information presentation, and the 'In Focus' tool (see Highlights) is great for eye-catching designs.

At a more nuanced level, there are many appealing little touches to enhance the UX. For example, a hover over many areas will lead to a pop-out card giving more details. The only issue is that this doesn't apply to native SharePoint web parts, so users may feel the feature is a little unpredictable.

For navigation, Atlas adds a persistent horizontal navigation bar, which can work as a mega menu or a fly-out cascading style (we found the latter a little over-sensitive to mouse position). The menu includes a 'Launchpad' section where important tools and services can be accessed. Behind the scenes, the whole menu is managed as metadata in the SharePoint term store, making it easy to tailor what users see by permissions and even multiple languages. However, Atlas does not wholly overcome M365's inelegance with having multiple levels of both horizontal and vertical menus. Nor are we keen on the use of a Teams search bar alongside Atlas's own search interface.

Notifications from Atlas feed through into the 'bell' icon in Teams, and Power Automate can be used to integrate notifications from non-SharePoint sources in this way. This is fine in principle, but users accessing the intranet from a browser will miss out.

Atlas extends branding possibilities over standard SharePoint only a little; generally customers should expect to stay within the Microsoft style guidelines for compatibility. ClearPeople say that Atlas is WCAG AA compliant for accessibility, but customers will need to take care with some options that are not compliant by default, for example disabling autoscrolling carousels and providing alternatives to the mouse-hover functionality.

## 2. Mobile and frontline support

score 2.5

Although Atlas works well as a responsive design in a mobile browser, ClearPeople say most users access it as part of the MS Teams or SharePoint mobile app experience, or as a web-app delivered through device management systems such as Intune. Although this has the advantage of familiarity, we do find that Microsoft's approach leads to potentially complex interfaces. Those designing rich intranet home pages should note that SharePoint is not adaptive,

so all web parts will appear even on the smallest screen.



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Atlas improves on SharePoint navigation for mobile users by adding a clear cascading menu system, which works well with touch screens. Items in the Launchpad menu can also be set to appear on desktop only, simplifying the mobile navigation. Unfortunately, this isn't possible with other parts of the menu.

There are some well thought-through enhancements for frontline scenarios too. For example, the 'Add it' web part makes it easy to contribute to workspaces on the go without navigating to them first (see Scenario 9). Even annotations to a procedure page can be fed back in this way from a mobile device. ClearPeople also says that the HoverPoint web part is often used to augment manuals for field work (see Highlights). It is also possible to give each user their own workspace and push content into it based on attributes such as skills. In this way, operating procedures can be delivered only to qualified engineers, for example.

Note that, being M365 based, all users will require licenses and an Active Directory identity to enrol, making it less versatile for frontline workers than some other options in this report.

#### 3. Internal communication

score 3

Atlas draws heavily on the capabilities of standard SharePoint for news and publishing. It fills in some gaps where appropriate, for example the 'In Focus' web part adds scheduling to any kind of content, not just news (see Highlights). Most usefully, Atlas also gives users the ability to set preferences for content targeting (rather than relying on Active Directory groups as SharePoint does), so users can choose to get personalised news reference pages for multiple

locations, departments, or topics, for example.

Atlas makes very effective use of search-driven web parts to collate news and reference pages in-context for users. For example, a page about a major customer can have sections that pull in any news about that customer or competitor from around the business, and any bids or sales collateral tagged with the customer name, no matter where they are stored (subject to security permissions, of course).

There's no centralised news management area as such, though Atlas will work with Microsoft's Viva Amplify feature for campaigns when it is released in 2023. Similarly, there's no dedicated urgent or crisis comms feature built into Atlas; ClearPeople say they can use Power Automate and Teams to generate alerts, but we feel this is less salient than rival systems.

Cross-channel comms mirrors standard M365 for generating automated newsletters from SharePoint, posting into Teams and Yammer etc.



#### 4. Community and engagement

2.5+

Currently Atlas relies heavily on standard Microsoft 365 for most social features and their strategy is to rely on Microsoft's own roadmap for this, particularly around Yammer / Viva Engage. ClearPeople do, however, have an ideation module due for release very soon.

As a result, aspects such as news commenting fall a little short of the competition (see the SharePoint and Viva review in this report). Some of the wellbeing features from Viva Insights are potentially valuable, but we expect most companies will need to pay extra to get the most out of the full version of this.

# 5. Information finding and knowledge management

SCORE 4+

This scenario is Atlas's strongest card, and for clients also willing to invest in Viva Topics, we would say it is among the market leaders for capability and comprehensiveness. Please see the Highlights section for a detailed explanation.

The search facility is powerful, and we like the ready-made filters. However, we felt the use of buttons for filters, though flexible, looked a little cluttered.

In particular, 'People' would be better as a specific icon or segregated search box. The search results page, however, is excellent, offering a wide range of facets and clearly segregated results for People, FAQs etc. We liked the ability to use the People web part individually configured to specific pages too, such as a "meet the team" directory for a department or location (see Highlights).

Companies looking for powerful knowledge management capabilities, such as law firms, will find a lot to like in Atlas. The product makes it easy to highlight specific content types such as 'policies'. It also has a handy way to quality stamp the most trustworthy content with a 'Gold Graded' tag. We appreciate that these document collections have a quick menu to share, download etc. too. In theory a document will preview with a hover-over gesture, but we found this was often slow and the preview too small to be workable.

For knowledge management, ClearPeople demonstrated some well thought-through scenarios of how Atlas's search and metadata capabilities work very well together (please see Highlights). Pages combine documents, summaries, and quick explanations from Viva Topics in a very effective way. Underpinning much of this is Atlas's ConneX tool for workspaces and metadata – see Scenario 10 for more on this. Although all of the above is impressive, potential buyers do need to factor in the additional costs of Viva Topics if they want the very best experience (though Atlas will also work without it). Viva Topics license fees are significant and it takes considerable time and effort to review and curate a corpus of topics for Viva in the first place.



#### 6. Admin experience and governance

SCORE 1 Most of the admin experience for Atlas will be the same as that for M365 (see our review of SharePoint and Viva in this report). This comes with the same plus points for ease of page-level admin, but caveats for the complexity of other aspects. ClearPeople has, however, done a good job of maintaining a consistent interface where it has added its own web parts.

A nice touch included in Atlas is the 'HoverPoint' web part. This allows images to be marked up with hot-spots, so that a mouse-over triggers a pop-up card with more information. This can be useful for annotating maps and diagrams, and the pop-up could even be an animated gif showing instructions. Particularly impressive is that the hotspot area can be any shape, not just a rectangle.

Site lifecycle management is greatly enhanced by the ConneX tool – please see Scenario 10 and Highlights for details. Note, though, that the benefits will be best felt with a clear start-point; organisations adding Atlas to an already mature estate of SharePoint and Teams may still have a lot of manual clean-up work to do.

There are no additional content lifecycle tools, though tyGraph does at least provide options for monitoring content expiry (see the next scenario).

For multilingual capabilities, customers again must rely on standard M365 offerings, though Atlas does enhance the management of multilingual menus (see Scenario 1) and Atlas components support multiple languages.

# 7. Analytics

SCORE 3+

ClearPeople supply the third-party reporting tyGraph with Atlas for analytics. This uses PowerBI as the interface and the various graphs are collected in a site called 'Atlas dashboard'.

The analytics show a comprehensive set of data specific to the adoption of Atlas, so admins can see which components of the product are being used, including, for example peak activity times, session frequency, average views per user and so on. There are even reports on metadata adoption, allowing admins to weed-out redundant tags, something we've not seen elsewhere.

For content analytics, there are useful reports per department, and also details on page authoring per department, so levels of publishing pro-activity can be monitored. It is even possible to see which are the most successful authors across the intranet. Web-like reports such as page heat maps, scrolling activity and bounce-rate are also included.

Mandatory reads for content are covered with a 'confirm' button for specific pages, though reports from this rely on a CSV export. tyGraph also goes well beyond just SharePoint activity, offering reports across the M365 suite. Its roots are in Yammer social network analytics, so customers with active Yammer communities will find this particularly appealing. However, in keeping with the style of Microsoft's approach, the dashboard feels very much like a collection of tool-based reports rather than an integrated console.

Although comprehensive, we do feel that tyGraph's interface may be a little complex for



many users and didn't get a strong sense that the reports had been tailored with specific roles, such as internal communicators, in mind. Given the versatility of PowerBI, it will be perfectly possible to simplify and adapt the reports, however. Interestingly, part of the service provided is a monthly review of the tyGraph data with an Atlas customer success agent. We like the concept of this hands-on support, and expect that it will help customers get to grips with the tyGraph interface.

## 8. Digital workplace integrations

SCORE 3+ Microsoft 365 already offers a broad set of integrations with third-party tools and all of these will be accessible to Atlas users. In addition, ClearPeople have added a script-editor web part which gives more versatility for embedding external tools than the standard SharePoint one. For example, they demonstrated a Zendesk chatbot working neatly in a pop-up panel using this route. There's also a ConneX API which means you can create Atlas

workspaces directly from other apps such as Dynamics 365 (see Scenario 10).

For an additional cost, ClearPeople partner with BA Insight to provide extra connectors for platforms such as SAP, iManage (legal document management), and ServiceNow. One of the advantages of BA Insight's approach is that it respects security permissions (this can often be problematic with simpler connector options). Another versatile property of the tool is that the connector can suck in results from another system, and then edit the layout to choose which data fields get shown and how they are populated. Again, this overcomes a common issue of data imports from other systems often appearing in a messy or over-cluttered format.

Finally, a small but welcome integration refinement is that URLs to external platforms will include a description and summary text which gets indexed by the search engine. In this way, it is easier for users to find the right tool even when the name may be opaque.

In other respects, Atlas users will find themselves relying on the standard integrations offered by Microsoft for things such as non-M365 collaboration tools and federated search, or custom-developing APIs. Although the maturity of these is variable, it is at least true that customers will rarely find themselves at a dead end for integration options.

#### 9. Microsoft 365 integration



ClearPeople's philosophy is always to align and integrate with Microsoft's developments, so as you may expect Atlas integrates well with M365 and all the native facilities remain fully available. The downside of this approach though, is that there are times when deficiencies in the M365 platform remain unaddressed, and customers will be left banking on Microsoft's own roadmap to address them (see Scenario 4 in particular).

Atlas does have some practical extensions to standard M365 to improve interactions across components, however. For example, a workspace in Microsoft Teams can appear as a summary card on a SharePoint page. It includes icons to quickly jump to a specific Teams channel, not just the 'General' channel every time. The 'Add It' web part also gives a universal start point to add content and then choose the destination, rather than navigating to the destination first. It also

prompts users to also ensure they add useful metadata.

A particularly valuable enhancement is the concept of 'visitors' to Teams. A growing concern in large Teams deployments is that you have to join a Team to see any of its content, and for senior managers with large portfolios this can mean hundreds of Teams at a time. The 'visitor' element overcomes this by giving people access to key documents in SharePoint, and uses a SharePoint page to give an overview, without the need to join the Team.

ClearPeople also demonstrated how it can use Microsoft's Syntex AI tool to automate documents (at extra cost). For example, a sales person may request a new NDA, fill in a form with key data, and then Syntex will automatically apply suitable tags and fill in the fields within the document. All of this can happen without the user having to know which template to use or where to file the NDA, so long as they have the right metadata. It can even be done from a mobile phone.

#### 10. Wildcard

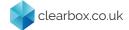
score 4.5

Atlas' Wildcard is the ConneX provisioning engine. Users can request workspaces and are guided through the provisioning process. Meanwhile admins can define templates for types of workspace, and apply some governance controls. This included the ability to assign permissions for who can request each workspace type, and enforcing naming conventions. Please see Highlights for a full description.

Although not unique, this is a very good implementation of a tool that fills a significant gap in the Microsoft 365 administration suite. ConneX applies a layer of consistency and valuable metadata that is hard to achieve with SharePoint and Teams alone.

Larger organisations that may have many thousands of SharePoint and Teams sites will particularly appreciate its ability to curb content sprawl. It retains the flexibility of Microsoft's vision that sites should be deployed on-demand by users, without the usual risks of inconsistency and a lack of management metadata. The only thing we felt that was really missing was a check to see if a similarly-named site already existed.

We appreciate the way that the templated approach then feeds through to support the information-finding and knowledge management approach described in Scenario 5.

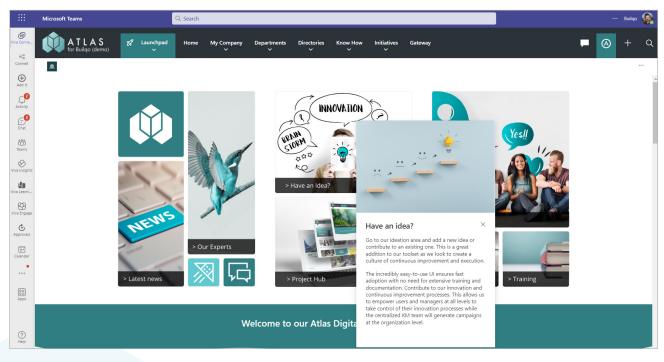


# PRODUCT HIGHLIGHTS

# 'In Focus' and 'HoverPoint' web parts

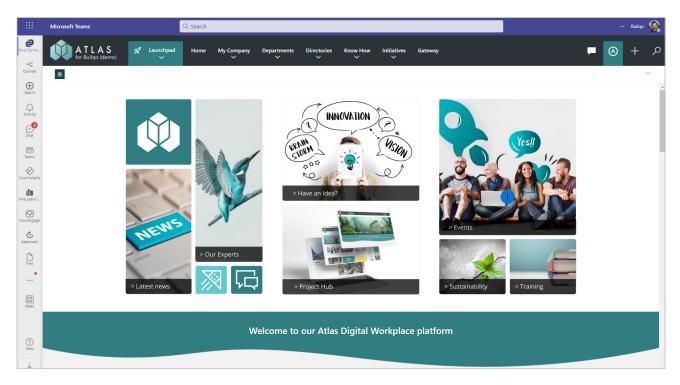
Atlas enhances SharePoint's publishing abilities with two versatile web parts: In Focus and HoverPoint.

In Focus can be configured to show a range of different kinds of content in one coherent web part. The content types are clearly labelled, such as knowledge, documents, news, and external insights. The content can be filtered and targeted by audience. It is also possible for users to change their profile so they can subscribe to topics of interest, such as a second office location that they visit frequently.

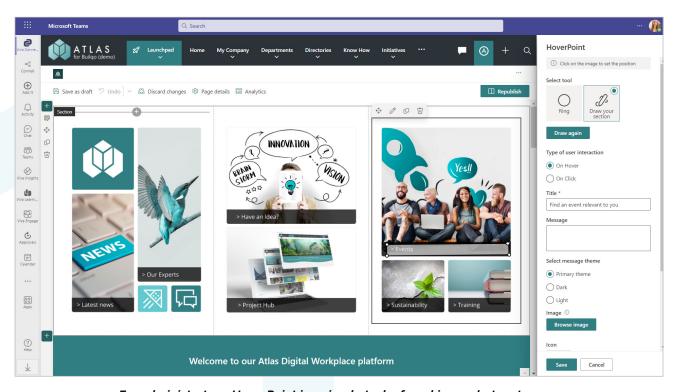


The In Focus web part is used to show a carousel of office locations, and below it a set of cards for 'latest knowledge'.

HoverPoint is a web part for marking up images to give them clickable areas. It can be used as an overlay on maps and plans, for example, or as a way to annotate technical drawings with operating instructions. Unusually, the area can be any polygon rather than necessarily a rectangle. In the below example, there are multiple links from a single image, allowing departure from the standard SharePoint look.



HoverPoint adds clickable hot-spots to an image.



For administrators, HoverPoint is a simple task of marking up hotspot areas, which don't have to be regular shapes.



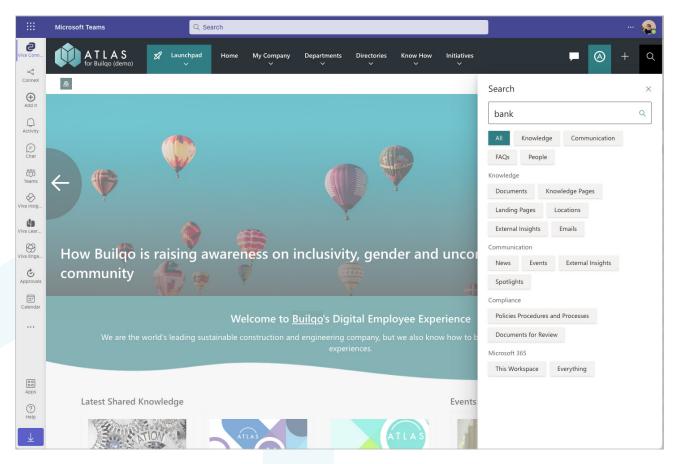
# Search and information finding

Atlas excels when it comes to organising and retrieving information. It makes extensive use of metadata and filters, and when combined with Viva Topics adds a powerful yet pleasing experience of interactive cards appearing with a mouse-over gesture.

Firstly, search is available across the intranet from the menu bar. The search dialogue includes ready-made filters (which can be customised by admins) for content types such as knowledge, communication, FAQs, and people.

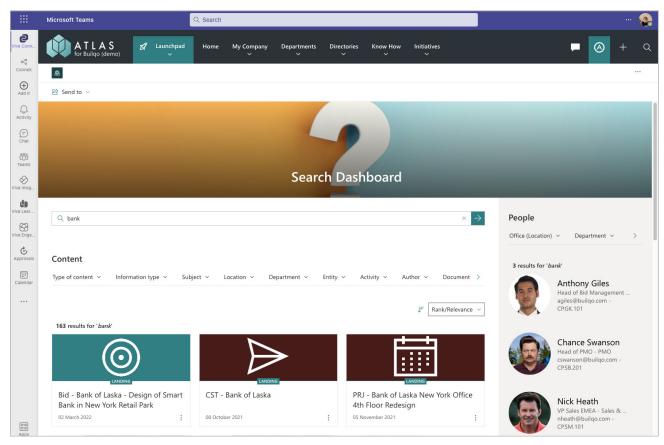
The results page is similarly enhanced, with a clear layout that segregates people and FAQs from the main block of pages, documents, Viva topic cards and even emails. Large result sets can be refined using a horizontal menu of facets covering subject, location, author etc. Although much of this is available in principle in standard SharePoint, Atlas does a much better job of making the options clear.

As well as site-wide search, Atlas supports more localised searches. For example, you can set up a 'Customer Directory' with filters such as location or industry. We were impressed that even the filters are searchable with type-ahead suggestions, useful for very long lists such as worldwide cities. A very neat aspect to this is that the search results summary can be different for a specific page. For example, the pages for the marketing department may highlight the brands people work on, whereas the PMO page could list key projects instead.

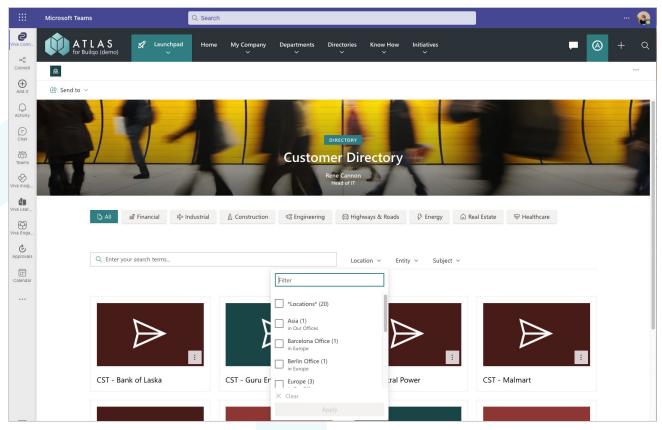


The search dialog is rich with options to fine-tune the scope.





The search results page has many possible filters to zoom in on a smaller results set, and also highlights people in a side panel.



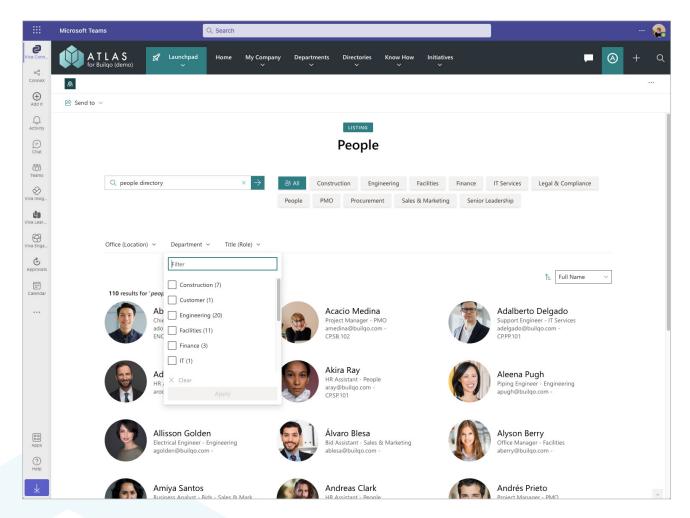
A search driven customer directory page; even the filters feature type-ahead suggestions.



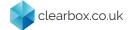
## People search

Atlas has its own people search web parts which do a good job of enhancing SharePoint's. The most valuable addition is again the ability to filter by attribute, making it much easier to find an expert when you don't know a name, or need to search within a specific office.

This web part can also be embedded on other pages with a ready-made filter applied. For example, the Canadian HR department could have a dynamic 'Meet the team' section which will update whenever somebody changes their role or location.



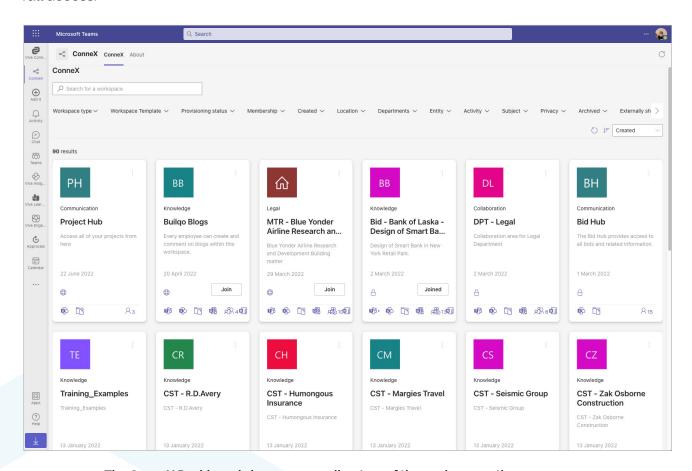
A dedicated people search has multiple ways to refine and filter.



#### ConneX governance engine

Underpinning much of the information management power of Atlas is a tool called ConneX. It appears as an app in Teams on the left-hand bar, but also as a dashboard within the intranet (accessed from the Launchpad, for example).

For end users, the ConneX experience is a dashboard of 'Workspaces'. These may be powered by SharePoint alone or SharePoint and MS Teams spaces combined. As with other parts of Atlas, it comes with a clear and comprehensive set of filters, and this makes it much easier to cope with a large number of collaborative spaces compared to the native interfaces provided by Microsoft. A neat touch is that each workspace card has icons giving direct access to specific features, such as associated OneNote or folders. Workspaces where the user is a 'visitor' rather than a full member (see Scenario 9) have a 'Join' button to make it easy to request full access.



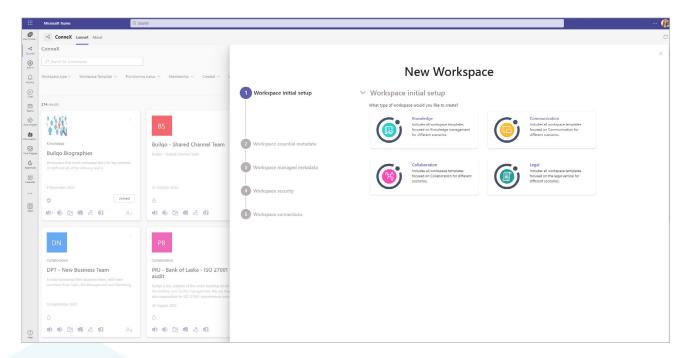
The ConneX Dashboard shows users a directory of the workspaces they can access.



Behind the scenes is a very capable provisioning engine which oversees consistency and metadata. Users can request a new workspace and they are guided through a series of steps. Administrators can define templates for workspace types, such as knowledge-sharing or legal matters, and assign permissions so that users are only able to request appropriate types. Naming conventions can also be enforced.

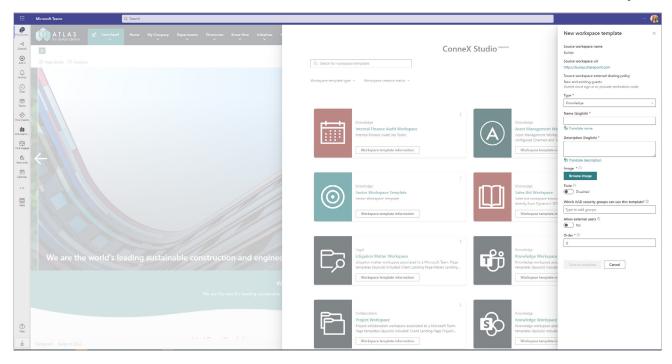
'ConneX Studio' makes it easy to define templates – admins just need to create a suitable workspace as a model and then instruct the engine to turn it into a re-usable template.

The final piece is that templates can have default metadata applied too. This may include topics, department, location, or sensitivity, for example. The real power of Atlas' approach is that whenever content is added to that workspace, it gets tagged with this metadata by default. This in turn fuels the powerful search and filtering options, described earlier in the review, and is much more reliable than asking users to add these tags every time a document is uploaded. The same principle is applied to channels in Teams, each channel name creates a folder which also becomes metadata to aid with document search and retrieval.

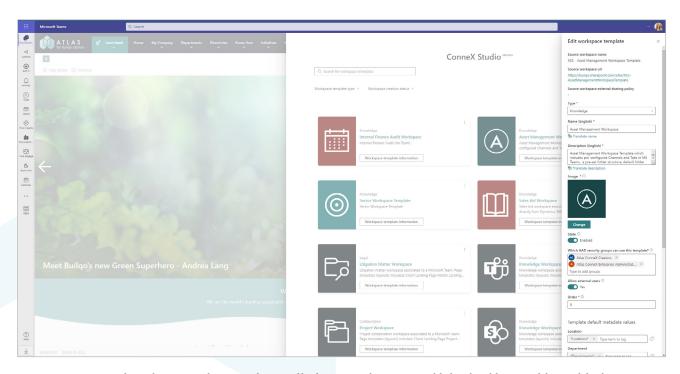


A workflow process is used to provision a new workspace based on templates.





Defining a template in Connex Studio.



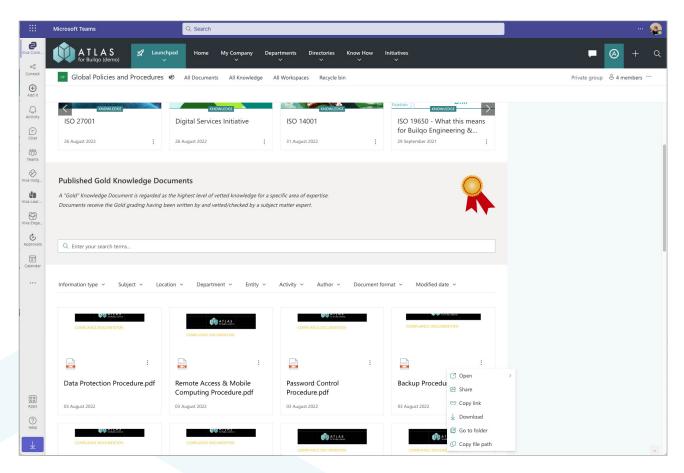
Comprehensive metadata can be applied to a workspace and inherited by anything added, such as document uploads.



## Knowledge management

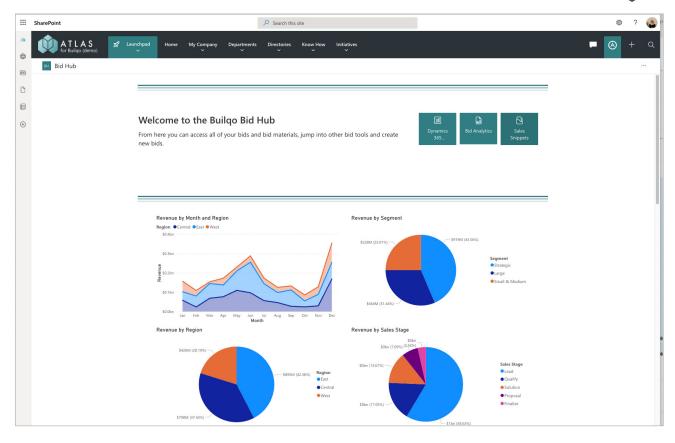
Atlas makes it easy to aggregate and curate collections of documents and 'knowledge' (which may be pages or Viva Topics cards too). Its search-based approach comes to the fore in situations where content producers want to feel like they have 'their' content collated, but content users want to see a more cross-functional view. Using Atlas, both parties can be kept happy, with a user-centered "All Policies" experience that looks like one place, but which is actually aggregating disparate material, such as Procurement policies, HR policies etc.

ClearPeople also demonstrated a related use case using the same principle: client or project-centric 'hubs'. For example, a hub to support a major bid process can create an aggregated view of templates, sales collateral and prospect-related documents which appear to be in one place to the user, but which actually reside in dozens of separate locations across the digital workplace. Being search-based, any new additions will also automatically appear.

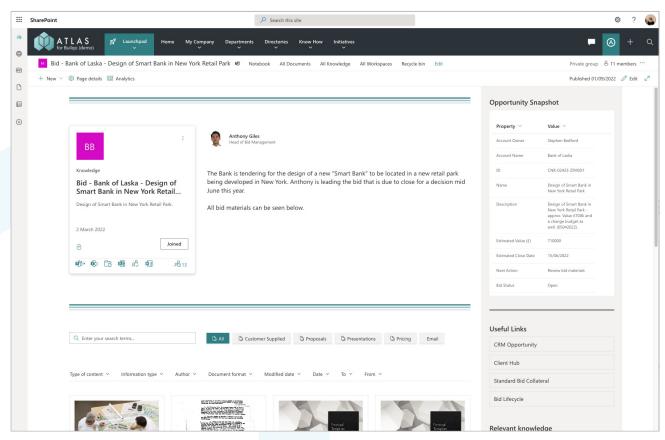


Policies can be aggregated dynamically into a policy centre and a 'Gold' quality mark applied.





Atlas makes it easy to create a 'Bid Hub' and pull in related data such as PowerBI reports.



In this example of a hub, multiple resources related to a bid are being automatically aggregated to give more context to what the company knows about the potential client.



# THINGS TO BEAR IN MIND

Atlas is performing a delicate balancing act between improving on some of the gaps in SharePoint, Teams and Viva, whilst striving to retain full compatibility. To a large extent it succeeds, its web parts add value without being a barrier to using native components. However, there are some elements where the shortfalls remain. For example, the social experience is not enhanced by the product, so customers will rely on Yammer / Viva Engage and this remains a somewhat awkward fit with other components such as Teams chat and SharePoint comments.

In a similar vein, we find M365's analytics unsatisfactory, particularly from an internal communications perspective. Atlas addresses this by supplying tyGraph, which is indeed a very comprehensive reporting tool, but we find the interface data-dense and potentially off-putting to less technical users such as content publishers. We're told that tyGraph plan to build simpler, persona-based reports in future.

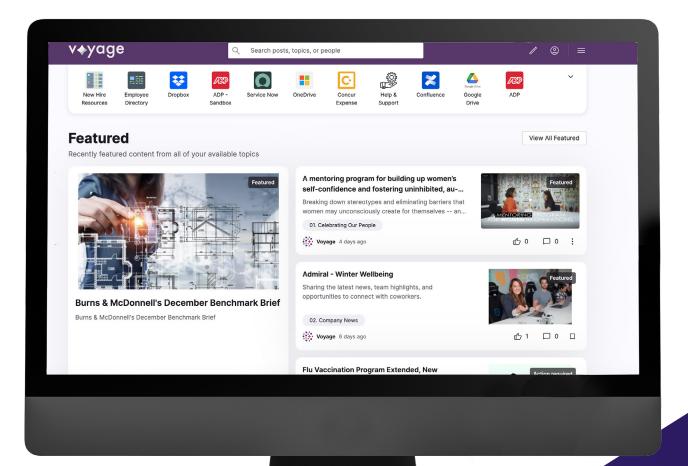
Finally, much of the power of the knowledge-management side of Atlas comes from its comprehensive use of metadata and search-based web parts. ClearPeople has done an excellent job of making it easier to apply metadata to content, but in real-world scenarios on any platform this is notoriously difficult to get users to sustain well. Potential purchasers will need to allocate proper resources to planning and governing this aspect of their deployment to get the best out of the tool.

# Why choose this product

Atlas excels at making information more manageable for organisations looking to build on their Microsoft 365 investment. Organisations which are knowledge-intensive, and with a mature perspective on the value of information management are therefore the ones most likely to have success with Atlas. This is reflected in its customer base where there are many professional services examples, such as consultancies, legal and engineering firms. Atlas delivers a more coherent experience than the standard Microsoft products, and does it with a level of panache and forward-thinking in its designs. Customers also highlight their satisfaction with ClearPeople's support and services as a vendor, making them a good choice for organisations looking for a solid partner to help solve tricky knowledge management challenges.







# Our view in one tweet

@Firstup is an excellent comms platform that has some of the best tools for internal communicators that we've seen, plus a helpful digital assistant for practical tasks.



Firstup is based in San Francisco, USA, and launched the Firstup platform in 2021. The company has a lot of experience in the market however, having been initially founded in 2008, and this experience is evident across the communications-focused Firstup platform.

The features overall are excellent and there is much that internal comms folk will appreciate, including the ability to intelligently manage pipelines and channels to communicate with employees effectively. The Orchestration Engine is particularly noteworthy: it introduces behavioural data (via AI) to content targeting and scheduling to avoid repetition across channels, and brings excellent results for users and publishers alike. The user experience is contemporary across devices, including on mobile, and the digital assistant benefits from this good UX to provide simple but

effective access to practical tools.

The focus on communication and engagement features means that there are a few gaps in functionality that some customers may want, particularly if they're looking for features associated with a traditional intranet. Given that Firstup will likely appeal to large or complex businesses, some of these gaps surprised us. For example, the search is limited and reference material isn't as well served as news-oriented communications. Governance tools, multi-language capabilities, and accessibility features are also lacking in places.

Overall, Firstup tackles communication and engagement needs very well and, with the strong digital assistant, makes an excellent accompaniment to a document library. Note, however, that it is among the more expensive products we've reviewed in this report, particularly for smaller businesses.



## Summary table of scenario scores

# NO. SCENARIO/SCORE 1 User experience and visual appeal Mobile and frontline support 2 Internal communication 3 Community and engagement Information finding and knowledge management 5 6 Admin experience and governance 7 **Analytics** Digital workplace integrations Microsoft 365 integration 9 10 Wildcard

#### Pricing

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### PRICING MODEL

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, government / public sector, healthcare, multi-year commitments, businesses over 20,000 users, marketing partner discounts.

Price includes: Project workshops, training for admins, training for end users, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, Microsoft 365 set-up, hosting, onboarding user data, access to a community & webinars, consulting services.

# Key benefits

- Tools for creating news articles and other post types are superb, resulting in attractive posts regardless of publisher skill level.
- Audience targeting is very strong, with excellent profile building tools for administrators.
- The Orchestration Engine is excellent, helping publishers reach the right people at the most appropriate time.
- Communication and campaign analytics provide detailed data for publishers in visual and extendable charts.
- A digital assistant approach to third-party integrations delivers a simple and consistent user experience within Firstup.

# Improvements and considerations

- The search is very basic, lacking any refiners or filters (although this is on the roadmap), which makes information finding a fairly manual process.
- Reference materials, such as document libraries or policy pages, are not well served.
- Features to manage content life cycle, mutli-language needs, and accessibility settings are basic in places.
- Firstup is a communications-focused tool that is different from a traditional intranet yet does what it does extremely well.



# **Product type**



# **Branding opportunities**

All branding, complex options

# Target businesses



**SMALL** less than 1,000 people



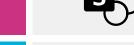
MEDIUM 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems









Fully standalone

Requires SharePoint Optionally works with SharePoint

Other

# **Sectors**











Healthcare

Engineering and manufacturing

Retail

Accountancy, banking and finance

Transport and logistics

# You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



Company Firstup



Company founded

2008



Company locations

San Francisco, CA, USA (HQ), Ireland, UK



ISO 27001 certified

Yes



Typical client size

Average company size is 20,000 employees.



Largest deployment so far

2 million employees and in over 100 countries (example from a single client)



Partner locations

None



#### Customers

Clients include: Toyota, Dow, PVH, Hilton, Hyatt, Providence, Wawa, Big Lots, Raising Canes, Southern Company Gas. Please see their website for more.

## Product and technical details

Name of product	Firstup	
Product launched	2008	
Current version	4.6.0	
Accessibility		e the font size of what they're seeing, Alt yboards can be used for navigation.



#### Deployment

Client onpremises Client private cloud Microsoft Azure Azure Amazon Web Services Vendorhosted Microsoft Other

#### **Data residency**

If located in North America, the Firstup primary data centres are in the US-East-1: Virginia region and their DR is in the US-West-2: Washington region. If located in the EU data centres are based in the Dublin area with backup in Frankfurt.

#### Client data encrypted

In transit only	In transit and at rest	At rest only
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#### **Authentication supported**

Azure Active Directory	ADFS	Open ID	Oauth	G Suite	Other*
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<sup>\*</sup>Firstup supports any IDP that is SAML 2.0 compliant.

#### Search technology

#### Document library sources integrated

Вох	Dropbox	Google Drive	SharePoint	OneDrive	Other*
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<sup>\*</sup>Zendesk. Firstup also says it can work with customers to integrate other solutions as desired, depending on the APIs with the customer's cloud document services.

#### SharePoint/0365 versions supported (if applicable)

SP Server 2016	SP Server 2019	SP Server Subscription Edition	SP Online	Viva Connections			
Mobile app deployment							
Google Play	Apple store	MDM	МАМ	Other*			

<sup>\*</sup>Via a private store (client or vendor hosted).



store

#### Reverse-out options

Customer data is retained throughout the lifetime of the customer program. Upon program termination, Firstup can export and purge data if requested by the client. Backups are retained for a 30-day window prior to expiration.

#### Languages supported

Afrikaans, Albanian, Amharic, Arabic, Armenian, Azerbaijani, Bengali, Bosnian, Bulgarian, Chinese (Simplified), Catalan, Chinese (Traditional), Croatian, Czech, Danish, Dari, Dutch, English, Estonian, Finnish, French, French (Canada), Georgian, German, Greek, Gujarati, Haitian Creole, Hausa, Hebrew, Hindi, Hungarian, Icelandic, Indonesian, Irish, Italian, Japanese, Kannada, Kazakh, Korean, Latvian, Lithuanian, Macedonian, Malay, Malayalam, Maltese, Mongolian, Marathi, Norwegian, Farsi (Persian), Pashto, Polish, Portuguese, Portuguese (Portugal), Punjabi, Romanian, Russian, Serbian, Sinhala, Slovak, Slovenian, Somali, Spanish, Spanish (Mexico), Swahili, Swedish, Filipino Tagalog, Tamil, Telugu, Thai, Turkish, Ukrainian, Urdu, Uzbek, Vietnamese, and Welsh.

#### Machine translation

Yes - via the product

#### Right to left script

Yes

# Set-up and support

#### Set-up process for new clients

On average, Firstup programs are launched within 4 to 8 weeks, however some customers have been set-up in days. A dedicated technical services team runs a technical planning schedule and ensures that Firstup "does most of the heavy tech lift". Firstup requires a few key access points into client data, including provisioning, attributes, branding assets, integrations, etc.

#### **Product updates**

Firstup regularly releases updates (usually weekly) to the platform, without any downtime. Larger releases typically occur quarterly. For small and large releases, nothing is required from the client side. Customers are updated with regular product and account management announcements. End users are updated with each app public release.

#### Product update process

Depending on the release; for some product updates, Firstup feels that it is best if all customers are updated at once. For larger releases that impact the user experience in a major way, Firstup often offers customers a timing that works best for their programme. For premium features, customers can opt-in or opt-out of the experience.

#### Technical support

Firstup provides support via phone, email and online resources. Support is available all day, every day in both US and EMEA time zones.

#### User community

Firstup provides customers the opportunity to join its Customer Advisory Board to provide feedback and attend a biannual meeting. Firstup also offers access to its customer community, hosted on the Firstup platform, with thousands of members. The customer community, called COMMunity, is a forum for customers to receive up-to-date product and company information, as well as collaborate and share best practices with each other.



### In their own words

Firstup says: "The Firstup platform transforms workforce communication by delivering content to any endpoint— highly personalized and professionally designed for engaging employee experiences. Our intelligent Orchestration Engine targets employees with messages on the right topic and device at the right time, while campaigns can be fully automated to save time and boost the effectiveness of internal communications. Firstup seamlessly integrates with workplace systems to meet employees wherever they are and collects user-level insights via interactive reports and analytics so organizations can optimize connection."

# Their view of the marketplace

Firstup says: "Organizations around the world are faced with the challenge of keeping their frontline and desk-based workforce informed and connected with the information and tools they need to be productive. No longer is there a central physical meeting place to update and convey messages to all employees — remote and mobile work environments have become the norm, making it harder than ever for communicators, leaders and managers to reach everyone, everywhere with relevant, personalized messages. Plus, businesses need a pulse point on their entire workforce through robust analytics, so they can clearly see what's moving the needle and what's not."

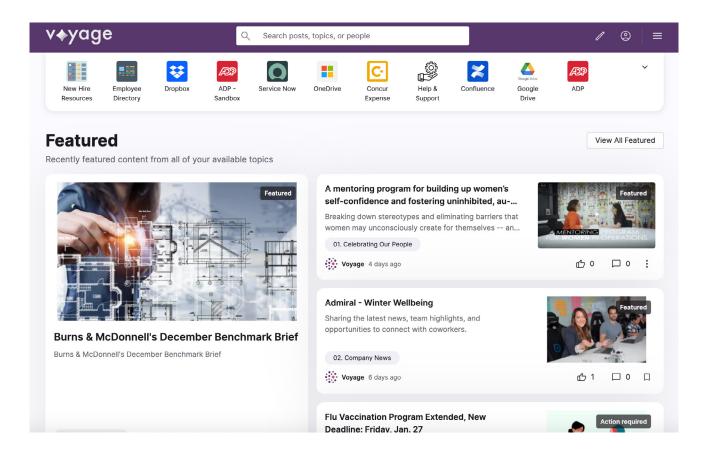
# Voice of the customer

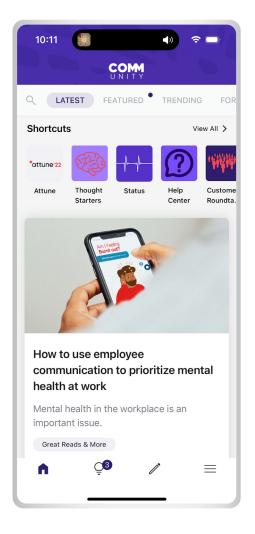
All the customers that responded to our survey praised Firstup's ease of use, "both for the Employee Communications team and all employees". Its strong capabilities for "connecting and communicating with employees" were also highlighted as a real benefit, with a customer adding that it has also "significantly improved the publishing and communication management capabilities of both professional communicators and the organization atlarge". The consistent experience across mobile and desktop was praised, as were the integration opportunities. Customers also recognised Firstup's efforts to develop the product in-line with the needs of users, with one person saying, "they listen to the needs of their customers and build accordingly".

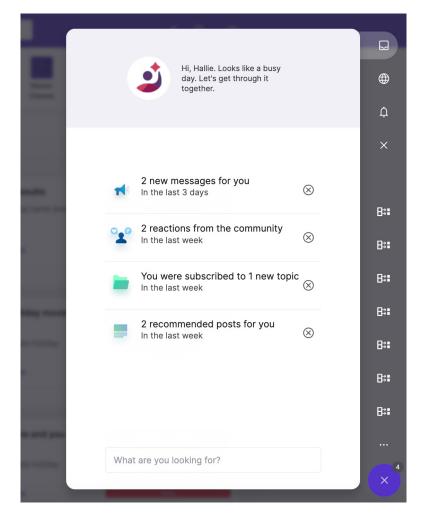
While the direction and scale of product improvements was praised, there was a request for "improved technology roadmap timing and deployment plans". The customer added that sometimes delays and changes to features following testing "aren't well communicated". One customer acknowledged that changes are being made to the back end but added that "some of the features are a little complicated for non-power users" particularly for those who aren't "in the platform enough" to use or get used to functionality.

The experience of working with Firstup was described wholly positively. The account managers were praised with one customer saying, "we have an awesome rep who we meet with every two weeks". Customers also said that Firstup "have continued to grow and enhance the platform in a way that matches user needs", which also reflect that they "have been very responsive to our feedback and requests for technology changes". One customer summarised their experience well, "Wonderful. They have great employees, are responsive to our requests, have a great support team, and always listen to our suggestions. I feel like they are a true partner".









# **REVIEW**

# 1. User experience and visual appeal

Firstup has a simple and clean look-and-feel that reflects its focus on employee communication and engagement, alongside its facilitation of third-party business tools. It provides a good experience that's easy to use and consistent across device types.

Branding is flexible, creating attractive sites and providing some simple options for a complex branding, for instance to give subsidiary companies a different appearance. However, the design of the site is very simple; for example, the home page is oriented around different post feeds plus targeted links to business tools or content, meaning there isn't as much flexibility to tailor the home page as other products in this report. Admins are able to reorganise the feeds of different communication posts, however.

Firstup also has an atypical approach to navigation, which reflects its focus as an internal communication platform. A hamburger menu takes people to three different news menus (latest, trending, and featured), their bookmarked pages, and a resources 'Topic'. Topics are themed spaces / channels for content, which people can discover and access via the hamburger menu. A 'followed Topics' option shows someone all Topics they belong to, which they may click into to explore further. This atypical approach works for Firstup's communications-focus to an extent, but we think a dedicated menu for Topics would aid navigation.

An 'Assistant' is accessible via a floating lightbulb icon, which helps users navigate content such as latest information, company links, latest news and Topics activity, and integrations via a chatbot type interface. This is also where people will find notifications, with new ones highlighted with a Firstup icon and where older notifications can be referred to again if wanted. The Assistant is a great tool, which provides a very practical layer to round-out Firstup's purpose beyond news (see Scenario 8).

Firstup is very communication and community focused, so practical tools and reference features are given less prominence as a result. Overall, however, the platform is attractive and the user experience is reminiscent of social media sites, making it easy to use and familiar to end-users.



# 2. Mobile and frontline support

SCORE 4+

Customers receive a launch kit from Firstup, which guides them through the available app rollout options. Users must exist in a database somewhere in order to get access to the Firstup app, such as a payroll system, but they can be prompted to download the app via a paper QR code, text to download, or a registration email. They can then download the app from the relevant app store and set up their account. Single sign-on is available and admins choose what

identifying details someone must enter, such as payroll number, rather than necessarily an email address. Biometrics are available to gain access in future, and admins define how long it will be before the app prompts a user to log in.

The mobile app offers a very pleasant user experience that's reminiscent of a consumer-oriented app. News is separated into tabs for latest, trending, featured, and 'for you', which are the categories the desktop uses. The assistant is accessible via a lightbulb icon on the bottom bar, including the same content from the desktop experience. Posts can also be created from that bar, and the content in the hamburger menu accessed. The search is also consistent with the desktop indexing Topics, posts, and people (although see Scenario 5 for more on search). Simple branding is included in all packages, and although white labelling can be done at extra cost, Firstup don't recommend it.

The structure and content of the desktop site is brought across to the app, with the addition of 'helpful links' to frequently used Topics. By controlling the audiences for Topics or posts, publishers can influence what mobile users see.

For frontline features, Firstup says that advocacy capabilities work particularly well on mobile (see Scenario 3). We can also see that the digital assistant and associated integrations (see Scenario 8) can be used flexibly to meet associated needs. There is a useful mobile home screen widget that shows content from the 'smart inbox' without people having to open the app. Users can preview attachments without downloading them, which is helpful for those with low bandwidth too.

# 3. Internal communication



SCORE 4.5

Internal communication is Firstup's area of focus, and the associated features are excellent. Content is administered in 'Studio', a separate console to the Firstup front-end; please see Scenario 6 for more on Studio and see the Highlights for details of much of the functionality covered in this scenario.

Studio includes a section called 'calendar' to gain an overview of what posts

are due to be published. When creating a post, publishers can select a template or create a 'simple' post, such as an uploaded video. Blocks of content can be created from a library of templates and are simple to edit, with fine-grained controls. Publishers can preview the post across device types, although any changes made to one will apply to all three. Note that there are no approval workflows built-in, but this is on the roadmap. Audience targeting is completed via the 'Orchestration Engine', with pre-created audiences or new audiences built on the fly. Publishers may rely on the Orchestration Engine to issue it at the most appropriate time for the post and for the individual, or manually schedule it. Posts can be associated with an

'Initiative', which gathers content within a theme or campaign.

Reference material is less well-served than active communications. All posts are created in the same manner; attachments can be added to reference material, such as policies, but file types are restricted to documents, spreadsheets, presentations, and PDFs. Reference posts are then saved in the 'resources' Topic, or within a specific Topic such as 'HR policies'. Users can subscribe to Topics to opt into associated communications too.

For urgent communications a 'microapp' can be placed on the home page and include a link to a selected post. Alternatively, 'simple' posts can be formatted to make them stand out, then the Orchestration Engine dictates a 'critical' level of importance. Users will be prompted to acknowledge when they have read the post, and the Engine will auto-generate reminders. Posts can also be 'featured' with an associated label, such as 'From the CEO', which also helps with visibility. The support of critical updates isn't as effective as other products we've reviewed, but the auto-reminders are very strong.

Finally, there is good support for communicating outside of Firstup, including a newsletter tool, into MS Teams, SharePoint, digital signage, other third-party tools like ServiceNow, and via employees' social media accounts. Please see Scenarios 8 and 9 plus the Highlights for more.

# 4. Community and engagement

SCORE 3.5

Firstup's focus as a communications tool extends to all users, not just comms teams. It's possible for Topics to be open or closed for membership (people will see recommended new Topics in their notifications) and posting content can be open too, meaning that people are able to share their news and updates across Topics. The creation process is much simpler than the full comms tool (covered in Scenario 3) and there is also a nice gallery widget available that people can

upload their images to. The permissions associated with Topics are respected and posts will appear in associated widgets, menu areas, and notifications.

Reactions are limited to likes; we think it would be beneficial to expand these to replicate the typical consumer social media experience further. There aren't any moderation tools for posts but banned words are automatically blanked in comments and users can report comments for moderation and removal by admins. Admins can 'highlight' comments, potentially to reflect a correct answer, and sort them; sorting by 'most liked' comments would be helpful during a town hall for example.

When creating a post, publishers may include a poll, which can be interacted with when sent via email too. This is a very simple approach to opinion gathering, although an integration with MS Forms or SurveyMonkey could be used for something longer. Firstup includes 'drip campaigns' to help onboard people, where a series of messages are triggered at set points, such as on the day of joining. Topics are a simple solution for employee recognition, wellbeing or ideation, but there aren't any dedicated features to support these activities.

Overall, Firstup's communities and engagement tools work well as an extension of its communication focus. However, practical and dynamic tools are missing to support communities of practice or project teams. Some social features, such as post moderation, are also simpler than other products we've reviewed in this report. We hope to see some of these areas develop to make Firstup a more fully featured solution.



# 5. Information finding and knowledge management

score 2

The Firstup search covers posts, Topics, or the directory (see Scenarios 8 and 9 for federated search), but overall we found the experience rather limited. The body and headline of posts is indexed, then results are returned in date order with the most recent first. There are no refiners or filters available (although Firstup says this is on the roadmap), so users must manually explore the results to find what they're looking for. The search

results page cannot be configured, and there are no features to help publishers improve the findability of their content (such as sponsored results).

Page templates help with the layout of complex or reference information, which may be tagged as 'resources' and are returned with other results. There is no dedicated search within the resources Topic, or within any Topic that might be being used for reference content. Firstup says this is on the roadmap, however. There are also no folder structures to help users navigate through resource Topic posts. Resources can be tagged however, which will add suggested content (that has also been tagged) to the bottom of a post for a user to browse through.

Users search for colleagues via the main search, where the returned people cards are attractive, with a good deal of information about the employee. People see a timeline of their colleague's posts (where they have the same permissions for Topics), and a list of the Topics they are a member of. There is a simple org chart too, which displays a few steps either side of the user on their profile card and new colleague profiles can be opened from here. People may edit relevant fields and search for colleagues using any profile field. Please see Scenario 10 for more on profiles.

The lack of filter on the search results provides a disappointing user experience and we would like to see more done to help users find content, particularly around resources or key posts that they may want to refer to time and again. There are improvements on the imminent roadmap, which we think will make a big difference.

# 6. Admin experience and governance

score 3 The admin console, Studio, is separate from the Firstup front-end. It's easy to use with a simple navigation and the user experience for admins is as strong as the front-end UX. There are tool tips throughout Studio, giving good guidance on how to complete an action. Permissions are applied to individual users here, which are customisable by the 'Super Admin'. The permission settings are incredibly fine-grained (see Scenario 10), allowing businesses to configure roles

to suit their exacting needs.

Admins can adjust the home page from the Studio, defining what links appear at the top and the ordering of widgets, plus which Topics feed into those widgets (the contents of which respect permissions). Options for designing the home page are more limited than traditional intranets but work well for Firstup's communications-led approach.

Studio is where Topics are created by those with permissions, along with Initiatives, which allows posts to be linked together for communication campaign-style reporting. Currently Initiatives are simply a list of words or phrases, we feel that admins would appreciate being able to add more information, such as when the Initiative was running or a department associated with the Initiative. However, it's easy to deactivate or archive an Initiative or Topic within a



dashboard. Pages created through the design tool have settings associated with archiving too. There is reporting on content that hasn't been viewed in a while and on the roadmap is a calendar for publishers to see an overview of what pages are approaching archive. We think notifications for publishers about expired pages would be helpful. There aren't expiry settings on user-generated posts, however, meaning the search could get clogged with outdated content.

Firstup relies on the user's browser to translate navigation and there is no way for publishers to create multiple language variants of content, they simply indicate which posts can be translated by the end-user. An icon then displays on content that can be translated, which is completed via AWS in Firstup. Comments can't be translated on-the-fly, although this is on the roadmap. We feel that having more refined multi-language features is a missed opportunity, given the sophistication of the internal communication features and the types of organisations that will be attracted to Firstup.

# 7. Analytics



score 4.5

'Insights' in the admin console displays a good range of analytics, beginning with an overview of activity within the last 30 days detailing who the most prolific publisher is, and the most active Topic, for example. Those with permissions can then dig down into detailed reports on areas such as 'audience lifecycle' or 'user performance', and over definable timeframes. Firstup configures the reports for customers during set up and will create

custom reports if areas aren't immediately available. Results are displayed in a series of attractive graphs or tables and can be manipulated on-screen, exported to CSV, or exported via API into PowerBI, for example.

Communication reporting is excellent; users can view detailed reports on 'Initiatives' for communication campaigns, which includes analytics about all associated posts in the Initiative as well as reporting for individual posts. There are also good analytics for advocacy posts. A/B testing isn't possible through targeting the same audience with variants of content / headings; however, splitting the audience (see Scenario 10) would give some degree of testing that we've not seen in most other products.

Content can be marked to 'require acknowledgement' from users, those who don't acknowledge will continue to receive prompts about the post until they do. Who has or hasn't acknowledged content is tracked and available as part of the reporting.

Although the search isn't one of the strongest areas of Firstup, the search reporting is good. The analytics include details of popular keyword searches, unique search terms, and average searches by user. However, we would like to see 'failure to find' and similar analytics that highlight where users may be frustrated or gave up looking for content. If this could be combined with improvements to search, then Firstup would have a compelling set of information-finding features.



# 8. Digital workplace integrations

SCORE 2.5+

Targeted links on the home page either open third-party systems or launch integrated tools, such as submitting an IT helpdesk ticket. However, the 'command centre' within the digital assistant is the main location for integrated tools. Information is displayed (such as a latest payslip) or workflows (such as requesting a new laptop) completed, including associated workflows and two-way integrations with source systems. We

saw examples of Concur, ServiceNow, Zendesk, JIRA, and ADP. Firstup will add others for customers on request, which may incur additional cost, and note that Firstup will complete the initial configuration of the command centre too. Integrated notifications from third-party tools is on the roadmap and will be a helpful addition.

The command centre provides an excellent user experience, through a series of simple button requests within a chatbot-style interface. We really like this simple but effective approach, which removes the need for users to remember which tool does what. Please see the Highlights for details.

For files, Dropbox, Google Workspace, Box, or similar can be integrated, but only so that content appears within a tab on the search results page. Users can search within those external document libraries for content although they are taken out to the library to open the document. Additionally, the filtering issues highlighted in Scenario 5 are particularly obvious here as it relies on users scrolling through results to find what they need. However, we do like the possibility of restricting federated search to a single folder rather than an entire library. Note that it's possible to federate content in the above-mentioned integrated solutions too, subject to configuration.

# 9. Microsoft 365 integration

score 2.5+

As with the document libraries mentioned in Scenario 8, integrated SharePoint libraries can be federated within the search but without any filtering options available. Links to site collections may be added to the digital assistant where wanted. News articles posted into SharePoint can be brought through into Firstup Topics, and conversely, Firstup content can be viewed in SharePoint web parts. SharePoint and OneDrive content is shown

in tabs in the search results, which helpfully also shows the site location.

A Firstup Topic can be added as a tab to an MS Teams channel. We think this is helpful, as Firstup focuses on communication it would allow users to concentrate on collaboration or other project / team tasks within MS Teams channel posts. Alternatively, Firstup can be added as an option in the left-hand navigation, which would effectively open Firstup in a browser window inside MS Teams. Integration of Firstup notifications into the MS Teams alert bell is coming soon.

Firstup Content Microapps can be integrated within SharePoint, which then can be displayed via Viva Connections within MS Teams. This brings Firstup's targeting, personalisation, and content publishing into the Teams experience, making it a compelling rival to Microsoft's own tool.

It's possible to add Stream videos to pages by using an embed code. For Yammer, there is an API workflow available that will cross-post in a Topic and Yammer community, although customers will have to ask Firstup to set this up.



# 10. Wildcard

score 4

Audience targeting in Firstup is excellent and is an important part of the Orchestration Engine (covered in Scenario 3 and the Highlights) and to the business more broadly. Audiences might be pre-configured, such as M365 groups, come from integrated systems and potentially from multiple sources (such as Active Directory plus an HR system plus an LMS), or can be created within Firstup in advance or on-the-fly. Boolean logic helps with audience

creation, then the audience is either treated as temporary or saved for later use / editing.

What makes the audience targeting particularly powerful is that Firstup utilises any of the attributes that have been set up for people profiles, which are fed from systems or editable by individuals, such as for pronouns or alternative spellings. This also includes fields such as time zone, where Firstup recognises when someone has changed their time zone (due to travel) and will adjust the Orchestration settings accordingly. An individual's activity within Firstup then influences their profile, such as preferred channel (based on actual usage) and how active they are. This in turn influences the Orchestration Engine's targeting of them, and on the roadmap is the introduction of 'cohorts' that will identify people based on similar behaviours.

The power of profiles is also the downside, as it relies on accurate people data to target people correctly; in our experience this is often as big a project as launching a new intranet. However, profiles are easy to set up and for users to edit fields; although we would like to see the introduction of a 'profile completion rate' indicator and notifications to remind people to keep their profile updated. Once the data is in place it will be hugely beneficial, particularly as it is subsequently usable in other business systems too, so is worth spending the time to get it set up properly.

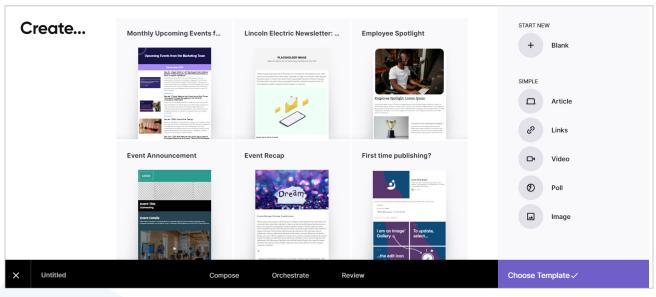


# **PRODUCT HIGHLIGHTS**

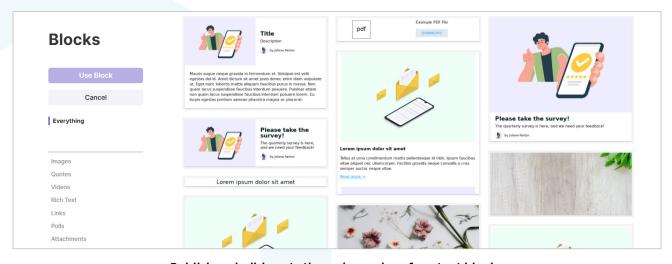
# Creating formal communications

There are a variety of fine-grained features for internal communicators to create impactful comms, such as news articles and email newsletters. First, publishers can choose to start from a pre-configured content-type template, such as a newsletter. Alternatively, they can start from a blank page (to create a longer article) or create a 'simple' post, such as a dedicated poll or an alert.

Publishers then build up an article using content blocks and each block has a variety of separate templates to choose from. These templates give publishers flexibility in the design and it also means different parts of the post can be given different levels of importance. For example, a publisher may want to include a poll in an email about the success of a company event and give it the most prominence; whereas in an article about the introduction of a new company charity an initial poll to gauge reaction might be less important than the message itself.



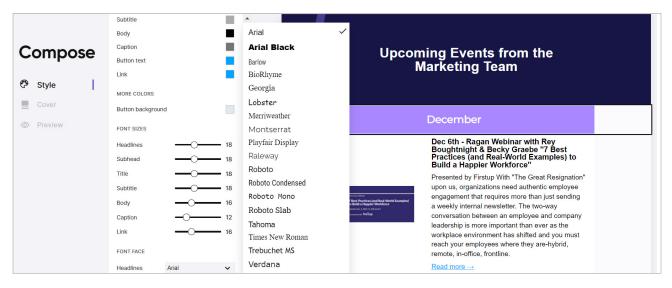
Publishers can start from a pre-configured template, or from a blank page.



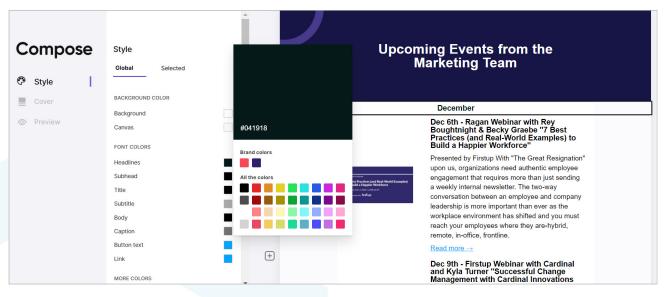
Publishers build posts through a series of content blocks.



Although content blocks are inserted into posts, publishers still have a great deal of control over how each looks and what it contains. For example, drop downs give a variety of choices for fonts across the piece, allowing company header and body text fonts to be accurately reflected. There are also sliding scales to change font sizes of individual sets of fonts, such as captions or links. Choices made can be applied globally to the whole post, or to individual sections if desired. Where individual blocks are edited, publishers can tweak the spacing to balance a page properly.



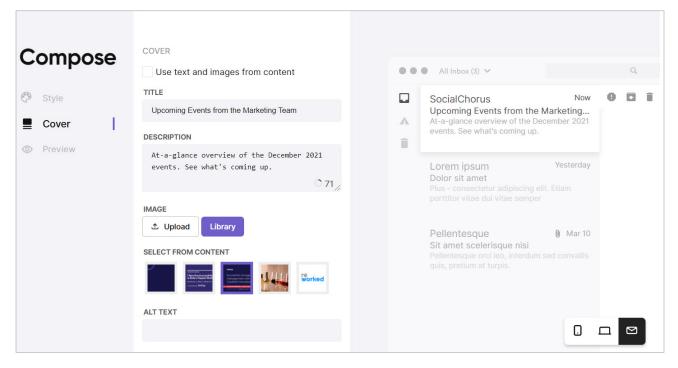
Editing tools are fine-grained and build attractive pages.



Individual blocks can be edited, or changes can be applied to an entire post.



Publishers must add in a title and description for a post, which can be drawn through from the content. A different cover image can be applied to the post, which will be what shows in a Topic or as an email header. Publishers can then preview how the post will display on the chosen device types, before selecting target audiences.



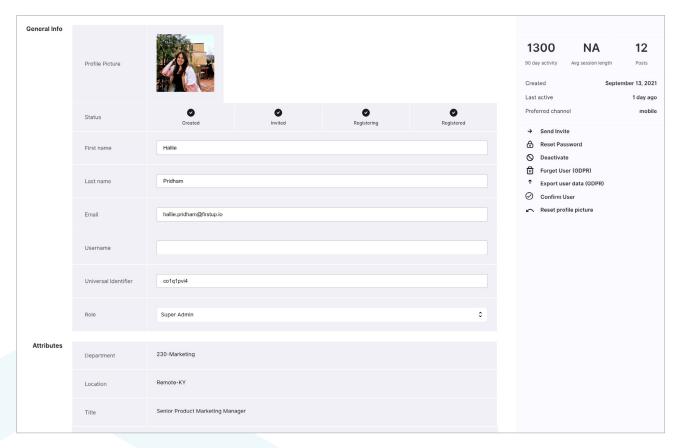
Publishers can preview how the post will look on selected device types.



# Audience creation and targeting

Once a formal post has been created the publisher must add an associated audience. Audiences might be pre-configured (such as drawn in from a tool like Active Directory or created earlier within Firstup) or created on-the-fly by the publisher. To create an audience, it first begins with people's profiles that are populated from as many sources as needed. For example, a training summary could come from an LMS, department information from Active Directory, and personal data from a payroll system. Fields may also be open for people to edit themselves, such as pronouns, names 'known by', and social media accounts.

Alongside the profile information, Firstup tracks user behaviours to improve the experience for the individual and improve communications reach. For example, someone's preferred device channel is identified from actual usage, active times of day and length of time on the platform is also tracked. This all feeds into the Orchestration Engine for audience targeting. Coming soon is the ability to identify similar groups of users based on profile fields and activity.



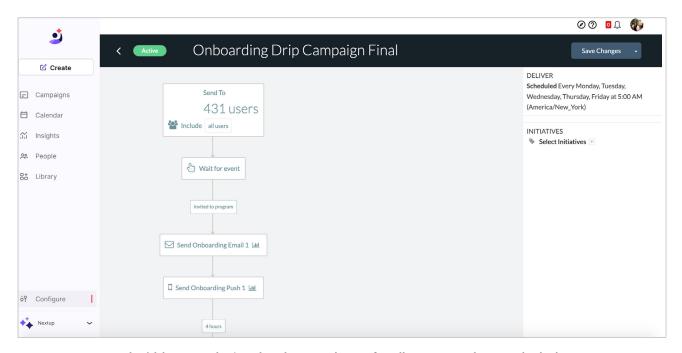
A user's profile page with a range of attributes, plus some initial behavioural information in the top-right.



193

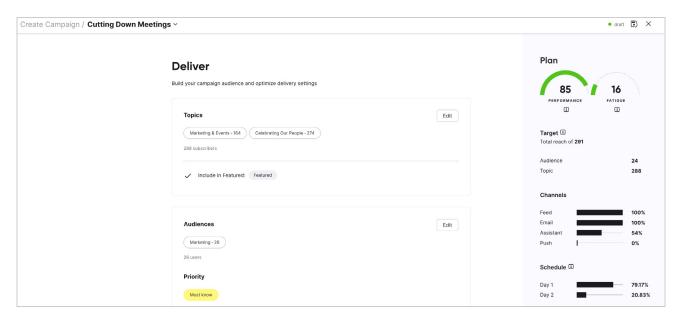
When a publisher comes to create an audience, they are presented with a dropdown to select relevant attributes with applicable Boolean logic where appropriate. This gives publishers the freedom to create audiences as they feel is appropriate, without the need to get help from IT or another admin.

Fields such as starting dates are available to publishers, which is helpful for creating content for new employees. This is even more powerful when combined with a flow tool called 'drip campaign', which triggers cross-channel communications subject to defined conditions. For example, a new employee could receive a welcome email on their first day, a push notification to update their profile on their second day, and a targeted welcome from the CEO a week later.



The 'drip campaign' tool makes good use of audience targeting, particularly start date for an onboarding experience.

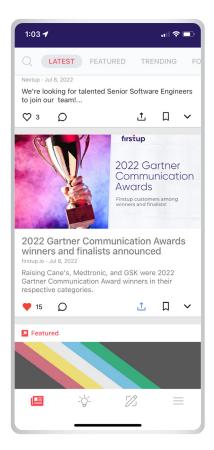
The selected or created audience(s) is visible in the final screen of the Orchestration Engine. A dashboard highlights how many people across which Topics will be targeted, as well as expected performance and audience fatigue. Audience fatigue indicates how much the chosen audience have been, or are due to be, bombarded with content. Publishers can then specify a publication date, can rely on the Orchestration Engine to issue it at the most appropriate time, or go for a hybrid approach.

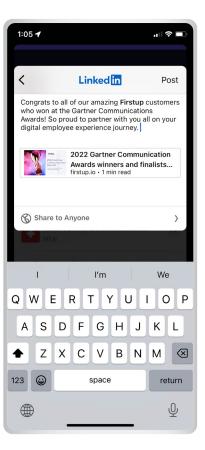


The Orchestration Engine includes a helpful dashboard that includes predicted audience reach and fatigue.

# Communicating outside of Firstup

Firstup does a good job of reaching people with communications, no matter where they are. Firstly, there are some simple employee advocacy features that allow people to share posts into their personal social media accounts. This creates a public version of the page with an editable post to accompany it. Where someone is using a mobile phone, they also have an option to share into WhatsApp and other app products from the same screen.

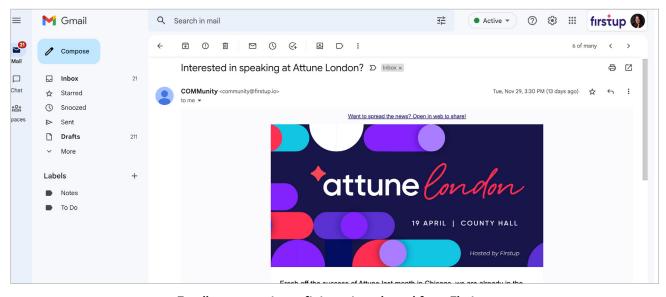




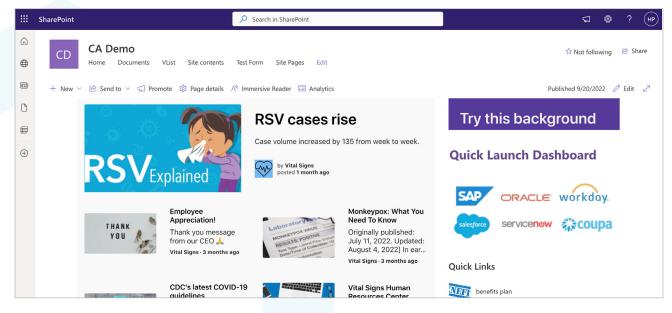
It's easy for someone to share a Firstup post into a public-facing social media feed (from desktop and mobile).

When a publisher creates a page, they may choose to send as an email newsletter, instead or as well as posting onto the platform. It's also possible to have a newsletter as communication type as part of a drip campaign (see the above Highlight). Email addresses are stored in profiles and so publishers simply create desired audiences as they do with any other post. Publishers may test emails before they're released to their audience, then there are reports specifically for emails in the analytics suite.

'Microapps' in the admin tool manage Firstup communications in other systems. This includes digital signage, which can be associated with a defined audience and will reuse content published in Firstup. Microapps also reach into third-party software, such as ServiceNow, Google, Salesforce, and SharePoint. A widget or web part in these tools is configured to show a Firstup Topic; Topics could be 'all company news' or something more specific like 'Sales team' in a Salesforce web part. The web part is essentially an iframe displaying a feed of top posts, but likes and comments are reflected here and so it does a good job of bringing communications wherever someone spends most of their time.



Emails are easy to craft, target, and send from Firstup.

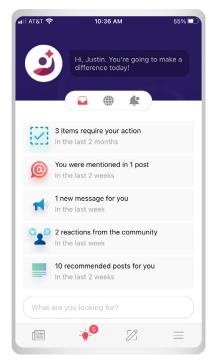


Using microapps people can see Firstup communications in a variety of business tools.

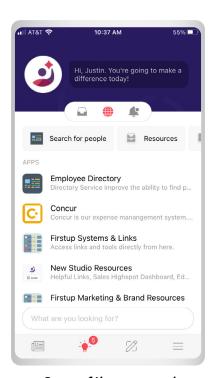


# Digital assistant

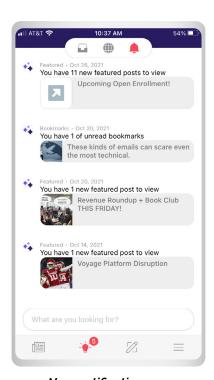
The digital assistant is available on desktop and mobile, providing a consistent experience across both channels. Accessed via a lightbulb button, there are three main menu options for users to pay attention to. First is an in-tray of recommended posts and areas that need attention, which is separate from the second menu that contains all notifications. While it may sound complex to have both, the in-tray allows for important activities to be floated to the surface for users, while notifications will tell them every time a friend has @mentioned them. The third menu is the 'command centre', where links and apps can be found.



The assistant in-tray with important information for the user.



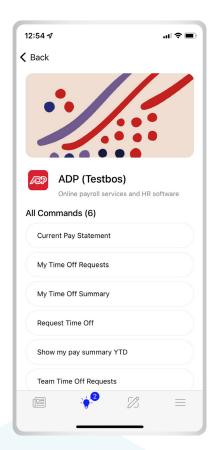
Some of the command centre tools.

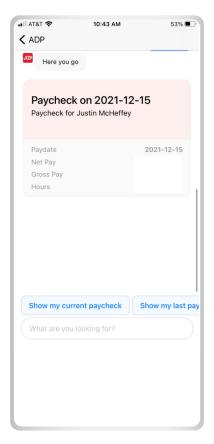


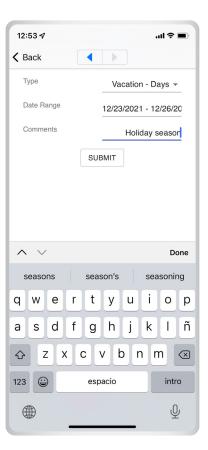
New notifications are highlighted by an icon.

Within the command centre section of the assistant, a user sees a series of buttons defining activities or questions, such as 'current pay statement' or 'password reset'. The command centre will either display information, such as a current payslip, or enter a workflow. Where a workflow is initiated, an approver (such as a line manager), or user who will complete the action (such as an IT colleague) will receive a notification in both Firstup and the source system. Once they have completed their action, such as approving an annual leave request or issuing a replacement phone, the requesting user will receive a notification within Firstup.

Other menu options within the assistant could surface content from Topics or provide links out to other business systems. Topic content can be surfaced via chatbot-style commands, such as 'show most liked posts', which is tailored to the user.





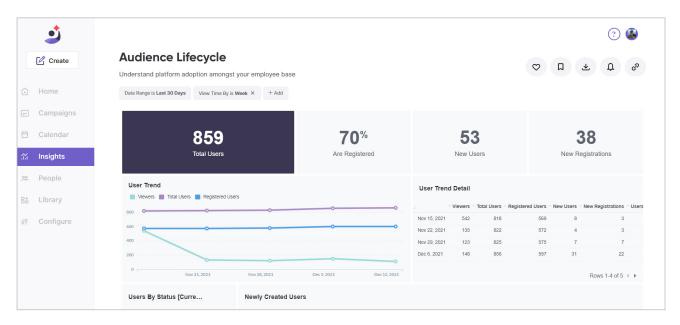


A user can check their latest payslip and request annual leave via integrations.

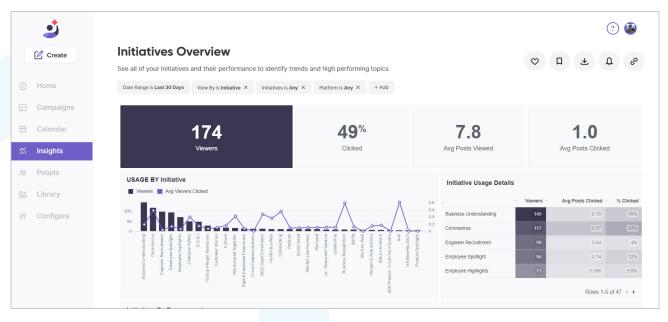
# **Analytics**

The suite of analytics available on Firstup is among the best we've seen. Publishers can first dip into an overview, which lists activities over the past 30 days, like the 'most shared post', or 'top publisher'. Reports are then broken into categories, such as 'audience', with separate dashboards presented in each, such as 'audience lifecycle'. The reports are attractive and detailed, beginning at a higher level which publishers can then drill-down into.

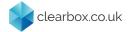
Content can be published and then reported on as an 'Initiative'. This groups content together under one tag, such as 'D&I 2023' or 'Sustainability 2023' and associates the performance of all posts with that tag. Publishers may then review the success of individual elements of the Initiative, plus the success of the Initiative (or communication campaign) overall.



Analytics dashboards are detailed, and publishers can drill down into information to gather more insights.



Publishers can see how individual communication campaigns have performed.



# THINGS TO BEAR IN MIND

Firstup is an excellent communications platform that has among the best tools for internal communicators that we've seen. The assistant adds a layer of practicality to it too, helping people get tasks done across a variety of tools. However, those looking for a way to present reference materials, in the form of document libraries or even just static pages of information, may struggle. Firstup therefore works best as an accompaniment to a reference tool (such as SharePoint or Google), particularly as it's possible for the search to federate external document libraries. However, there are some gaps in the search functionality that need to be addressed to make this a seamless experience.

The Orchestration Engine has been well-developed and introduces an exciting and relevant element of behavioural data to internal communications. However, it depends on reliable and extensive user profile data for publishers to really make the best of it. While that sounds like a simple solution to fix, our experience with clients suggests that poor data is a common issue, and it can be a large project in its own right to get it into a good position.

While the communication features work very well, it's worth noting that it is a platform almost entirely made up of formal and informal messages. For new employees or infrequent users, this may mean it feels overwhelming at times, like walking into a party in full swing when you don't know anyone. Admins will have to carefully consider how they theme posts in web parts, what they label them as, and how they guide people across the site.

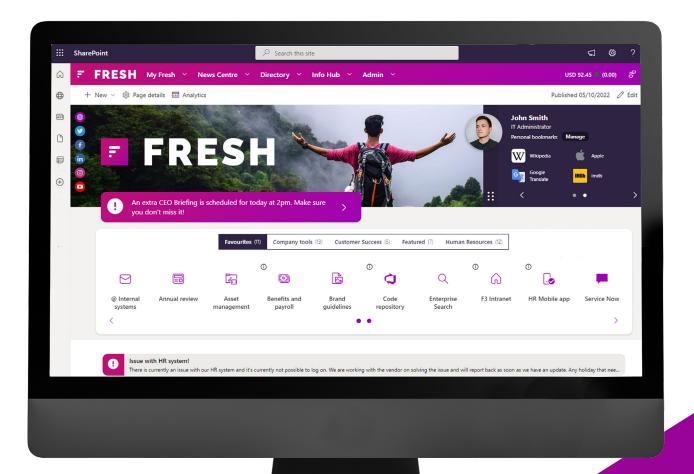
Firstup is one of the higher priced platforms in this report, particularly for smaller businesses, and it could end up being an expensive option where reference needs are met in a separate solution. Larger or more complex businesses, which suit Firstup the most, may also find the lack of accessibility and multi-language features disappointing.

# Why choose this product

Firstup is an excellent communications platform that delivers strong capabilities around content creation, audience targeting, engagement and multi-channel posting (including employee advocacy tools). The Orchestration Engine uses machine learning superbly and helps publishers deliver communications to the right people, at the best time. An assistant also adds a practical layer that helps people complete tasks from across the digital workplace but all within Firstup. Overall, Firstup will suit large or complex businesses that are looking for ways to address employee communication and engagement needs.

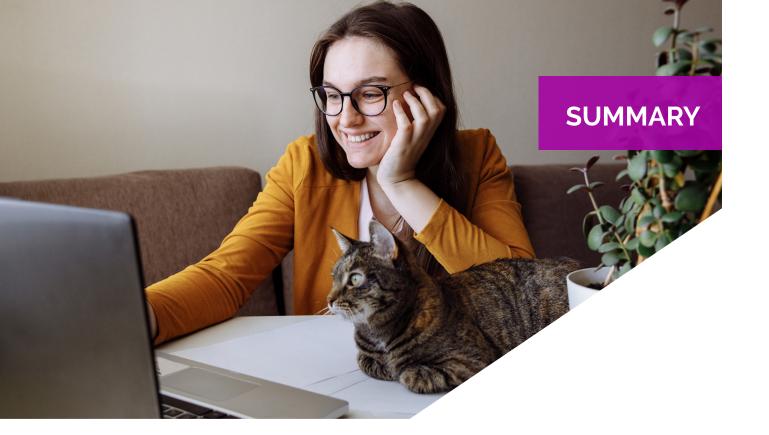


# FRESH



# Our view in one tweet

@Fresh\_Intranet is visually attractive and flexible, makes good use of SharePoint, Teams and Yammer, and integrates well with Viva Connections.



# Fresh, powered by Content + Cloud

Fresh, from Content+Cloud (London and Manchester, UK) is an intuitive, well-designed product that makes full use of modern SharePoint and other products in the Microsoft 365 ecosystem. The product offers plenty of flexibility to create a visually attractive and feature-rich employee experience. End users will appreciate the features around information finding and employee recognition, while internal communicators will be impressed with the many options for creating and delivering news stories.

In some areas, such as analytics and integration with third-party enterprise systems, the product is not so strong. In these areas Fresh relies mainly on third-party solutions like Google Analytics or connectors in Power Platform. There is also no native app to support mobile users. Instead, Fresh leverages the Microsoft Teams app and Viva Connections for delivering mobile content, and includes some innovative functionality within the Viva Connections dashboard.

Fresh will particularly appeal to medium and large organisations that have invested heavily in Microsoft 365 and that already use it extensively, including Teams, Yammer and Viva Connections. For large organisations with more than 20,000 users, the pricing of Fresh becomes very attractive.



# Summary table of scenario scores

# NO. SCENARIO/SCORE 1 User experience and visual appeal Mobile and frontline support 2 Internal communication 3 Community and engagement 4 5 Information finding and knowledge management 6 Admin experience and governance **Analytics** 7 Digital workplace integrations 8 Microsoft 365 integration 10 Wildcard

## **Pricing**

PRICE BAND		
250 users	\$ \$ \$ \$	
1,000 users	\$ \$ \$ \$	
5,000 users	\$ \$ \$ \$	
20,000 users	\$ \$ \$ \$	
PRICING MODEL		
Subscription – price band based on number of users		
DDICING NOTES		

#### **PRICING NOTES**

Discounts available for: Multi-year commitments for businesses over 1,000 users.

Price includes: Project workshops, training for admins, customer success services, maintenance, product support, updates and upgrades, consulting services.

# Key benefits

- The user interface offers plenty of flexibility to fine-tune the visual appearance and create a distinctive look and feel.
- Different mechanisms exist to target and deliver news stories to the right audiences.
- Information finding is handled well through contextual search, filtering, and topics pages.
- Fresh includes an innovative solution to serve mobile users via the Viva Connections dashboard within the Teams app.

# Improvements and considerations

- Analytics relies mainly on Azure Application Insights and Google Analytics.
- There are few out-of-the-box integrations with external business applications; Fresh relies on standard Microsoft capabilities.
- Fresh does not include a native app; mobile users are served via the responsive site and the Teams app.



# **Product type**



# **Branding opportunities**

Good branding, complex options

# Target businesses



**SMALL** less than 1,000 people



MEDIUM

1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems



Fully standalone



Requires SharePoint



Optionally works with SharePoint



Other

# **Sectors**



Accountancy, banking and finance



Engineering and manufacturing



Information technology



Public services, government and administration



Recruitment and HR

# You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



### Company

Fresh, powered by Content+Cloud



### Company founded

2000



### **Company locations**

London and Manchester, UK (HQ), South Africa



ISO 27001 certified

Yes



Typical client size

1,000+ employees



# Largest deployment so far

140,000 employees, 5 countries



#### Partner locations

No implementation partners, direct implementations only.



#### Customers

Clients include: BP, Bristol Airport, CIPD, DLA Piper, Ensono, Hays, KPMG, McCann WorldGroup, M&G, Nomad Foods, Phoenix Group, Tysers, Wawa

# Product and technical details

Name of product	Fresh
Product launched	2015
Current version	V4.3
Accessibility	WCAG 2.1 compliant



### Deployment

Client onpremises Client private cloud Microsoft Azure Amazon Web Services Vendorhosted Microsoft Other

### Data residency

Depends on the M<sub>3</sub>65 tenant location.

### Client data encrypted

In transit only

In transit and at rest

At rest only

### **Authentication supported**

Azure Active Directory ADFS Open ID Oauth G Suite Other

### Search technology

Apache Lucene/ Apache Lucene/ Microsoft Vendor's own Other

## Document library sources integrated

Box Dropbox Google Drive SharePoint OneDrive Other

### SharePoint/0365 versions supported (if applicable)

SP Server 2016 SP Server 2019 SP Server Subscription Edition SP Online Connections

Mobile app deployment

Google Play store Apple store MDM MAM Other\*

\*No native app



### Reverse-out options

All data resides in SharePoint lists and libraries.

### Languages supported

Any supported by Microsoft.

#### Machine translation

Yes - via the product

### Right to left script

Yes

# Set-up and support

### Set-up process for new clients

There are two approaches for Fresh implementations:

- 1. Fresh Go. A fixed scope implementation which provides customers with core workshops and activities typically required to set up an intranet in Microsoft 365. Following a deployment into the client's tenant, Fresh Go projects are typically 2 8 weeks in duration.
- 2. Fresh Explore. A short discovery phase focused on stakeholder and end-user engagement to tweak and adjust a standard implementation model. Fresh Explore projects can include extensive business change and adoption, additional customisations, content migration or Microsoft 365 service enablement. Typically, these projects are upwards from 8 weeks.

### **Product updates**

Quarterly.

### Product update process

Along with supporting documentation (release notes, build guide, step-by-step training guides), updates are made available for subscribers to download from the Client Portal and either install themselves or supported by Content+Cloud.

## Technical support

Typically provided from the UK during business hours (gam-6pm, GMT) but customers can extend coverage using Content+Cloud's managed service packages which can include a fully outsourced support desk all day, every day, for Microsoft 365.

## User community

Not currently.



### In their own words

Content+Cloud says: "Fresh is the enterprise-class intranet solution from Content+Cloud, designed to transform your Digital Workplace. Building on the power of Microsoft 365, SharePoint, Teams and Viva, Fresh reimagines the employee experience and helps your teams thrive in the modern world of hybrid work."

# Their view of the marketplace

Content+Cloud says: "Fresh addresses three key needs for organisations looking to create or modernise an intranet or digital workplace solution within Microsoft 365:

- It accelerates deployment of a SharePoint intranet with a ready-to-go architecture for small, medium or enterprise organisations that can be further tailored or extended.
- It provides additional features and components that close the gap between out-of-the-box SharePoint and third-party, fully custom solutions.
- It delivers ongoing client success orientated services to help run a successful intranet, covering technical support, intranet governance, training, content management and customisations."

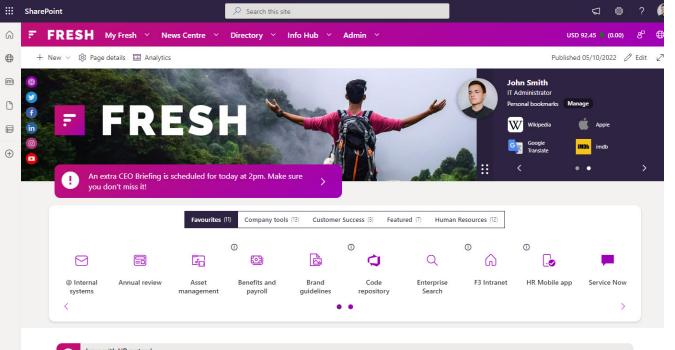
## Voice of the customer

Customers unanimously agree that Fresh is easy to use. They appreciate the templates, the intuitive navigation, and the additional web parts that Fresh provides above and beyond standard SharePoint. As one customer puts it, "the web parts are easy to use and offer relevant functionality to us that SharePoint is missing". The creation of new pages and news articles is straightforward and easy to learn, "the platform is really intuitive and has great UX. It's easy to train other people on the product".

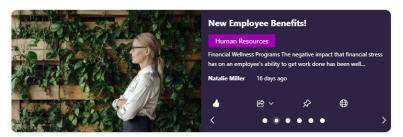
Requests for changes were mostly about more flexibility in the publication process and the layout options. One customer asked for an option to unpublish a page, "sometimes content is published by accident and there is no option to set back to draft or to unpublish". Another customer wants to see more flexibility in the layout of the templates, "to create more of a magazine layout instead of just text-image-text". Another customer wants a wider choice of themes and background colours, and also "an option to customise the configuration panel of the web parts; that will make it even easier to choose my preferred options".

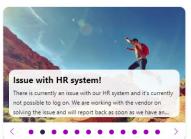
The experience of working together with Content+Cloud is positive across the board. Customers praise the experience and in-depth product knowledge of their contacts at the vendor. According to one customer, "the people are supportive and knowledgeable, they know their product well and are happy to help". This is confirmed by another customer: "We're happy with the support and guidance we get. Our contact points are professional, helpful and a pleasure to work with."

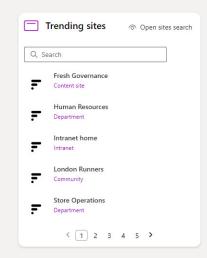


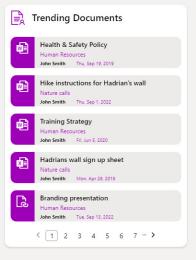


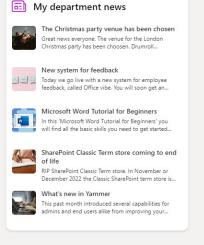
Issue with HR system! There is currently an issue with our HR system and it's currently not possible to log on. We are working with the vendor on solving the issue and will report back as soon as we have an update. Any holiday that nee...

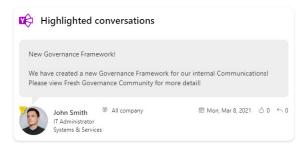














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# **REVIEW**

# 1. User experience and visual appeal

score 4 The user interface of Fresh is thoughtfully designed and visually appealing. The product stays close to the look and feel of modern SharePoint but adds its own capabilities to fine tune the visual appearance. For instance, web parts in Fresh can be customised to appear with round corners instead of straight corners, with or without a container, and with or without shadow. This offers organisations the flexibility to create a distinctive look and feel.

We particularly like the flexibility that Fresh offers when it comes to navigation. The top-level menu can be set up in many different ways, ranging from a simple horizontal navigation with dropdowns, to a rich mega menu with the possibility to integrate bold visual elements. Some examples of what is possible are shown in the Highlights section. Microsoft's own navigation menu is hidden, but can be made available where desired, for instance to add a specific navigation in a departmental section.

There is no central place within the product to bring various notifications and announcements together, but there are some useful web parts to help employees stay on top of things. An 'alert' web part can be configured using Power Automate to display notifications coming from other systems, and a 'What's New' web part gives users a personalised overview of what has happened since their previous visit.

Branding of Fresh is handled through the standard SharePoint mechanisms of creating a custom theme. If a different sub-brand is needed, then this is achieved by applying a different theme to a specific site. The SharePoint branding mechanism has its limitations, but Fresh offers the additional flexibility at the level of each component to override some of the default settings that come with the SharePoint theme.

# 2. Mobile and frontline support

SCORE 2+

Mobile and frontline support are provided through a responsive site and by leveraging Microsoft Viva Connections through the Teams app. Fresh is also accessible from the SharePoint app, but a dedicated intranet app is not part of the product. Content+Cloud says that this is an intentional strategic choice to be aligned with Microsoft's vision and tools for delivering content to mobile users.

Access to the mobile site, just like access to the desktop version, requires a Microsoft licence and credentials. Frontline workers can be equipped with Microsoft's F1 licences that are optimised for frontline usage. No other mechanisms to enrol are supported.

The responsive site displays well on mobile and is fully functional; all web parts adapt in a logical and user-friendly way to the reduced space available. There is a possibility to hide

certain tools or applications from the 'Toolbox' area when viewed on mobile, which is a useful feature for tools that are technically only accessible from the desktop. It would be a nice enhancement to extend this functionality to other areas of the product.

The product does not include any specific features for frontline workers, but it delivers the existing intranet content in an innovative way using custom-built adaptive cards within the Viva Connections dashboard. For instance, there is a card that gives an overview of relevant news stories, and another card that shows status information coming from various Microsoft 365 applications. Details are described in Scenario 10 and in the Highlights section. The product also includes various ways to segment content and to target it to specific audiences – more about this in Scenario 3 – which makes it possible to create a tailored experience for mobile users.

# 3. Internal communication

score 4

Fresh includes rich functionality to create and target news stories and other content, and to manage how news gets distributed across the organisation. Two different approaches are supported in the product. The first one follows the Microsoft model where news is created in a decentralised way and then rolled up into a central place on the home page. The second model, traditionally more popular among internal communication managers, uses a

central Communication Centre where news is created and then dispersed across locations and channels.

Creating a news story or a static reference page uses the standard modern SharePoint environment, which is intuitive and feature rich. Fresh makes use of the SharePoint functionality for scheduling and approval of news articles and adds additional properties such as review date or expiration date. A range of tags can be set up in the term store and applied to the page. There is a mechanism for end users to subscribe to news based on their interests and skills, and audience targeting based on Azure AD groups is also available. There are features to pin top news and to promote curated stories; details are in the Highlights section. A news hub is available that offers a contextual search and a range of refiners, but the product does not include any other tools for managing the editorial process.

Crisis and urgent communication are handled in different ways in the product. The simplest solution is to add a static alert message to a banner that is integrated into the header on the home page. Other, more powerful options include the usage of a SharePoint list where alert information is picked up and displayed within an alert card. Alerts can be targeted just like news stories, so different audiences see different alert messages.

Once published, news stories can be shared into a Teams channel or into a Yammer group and can also be aggregated into a newsletter digest. Other options, such as integration with a digital signage system, are not part of the product.



## 4. Community and engagement

# SCORE 3.5

Fresh relies heavily on standard features in SharePoint and Yammer, but it also adds some useful enhancements, especially around engagement and recognition.

Collaboration in communities is based on Yammer, which has been neatly integrated within Fresh. As part of the implementation process, a 'Communities Hub' can be provisioned, where Yammer communities are grouped together.

From here, users go to any of the Yammer groups and participate in the discussion without leaving the Fresh intranet. Yammer groups are seamlessly integrated into a Fresh page, and other web parts are added to this page to enhance the overall functionality. For instance, the Fresh events web part could be added to the page of a sports club, to show upcoming events.

Social interaction with news stories and other content uses the standard SharePoint functionality for liking and commenting, which is fairly basic. If a broader discussion about a news post is needed, it is easily shared into a Yammer group. Polls and surveys rely on standard functionality from Yammer and Microsoft Forms. Feedback can be given on each page within Fresh, if enabled, through a simple feedback form. Feedback will end up in a SharePoint list, where it is consulted manually or processed through Power Automate based on the client's preference. A nice addition would be to have a notification mechanism built in as a standard feature.

The product includes a few well-executed features around praise and recognition. There is a 'Kudos' feature allowing any employee to praise or say thanks to a colleague, and there is also a system of badges that are used for giving awards or for highlighting fire wardens or first aiders. Find out more about these features in the Highlights section.

Onboarding is supported through an induction checklist. This allows newcomers to see a list of actions that they need to take, and to check their progress. An HR administrator sets up the list and monitors overall progress. There is also an exportable report for further analysis. There is no specific functionality around employee wellbeing, but standard Yammer groups can be used to create relevant communities.

# 5. Information finding and knowledge management

SCORE

4

Given that Fresh is tightly linked to the Microsoft 365 ecosystem, it makes sense that the search experience within the product relies mainly on Microsoft Search. The standard search window is available at the top of the screen, so intranet users have direct access to all the features that come with Microsoft Search. This includes a configurable search results page, the possibility to create promoted results – now called 'bookmarks' by Microsoft

– and many other options. Management and configuration are done through the Microsoft tools. Where Fresh provides added value is in several overview pages, such as the News Hub and the Documents Hub, where a contextual search box and a useful set of refiners will help users to find what they are looking for within the scope of the page.

Finding people across the organisation follows the same approach. On the central people directory page, a contextual search box is available next to a range of relevant refiners, such as department, job title, skills, and badges. Clicking on a person will open a card with more

details. This card has a similar look and feel as the standard one from Microsoft, but there are some additional fields that end users can update on their personal profile page. There is currently no organisation chart included in the product, other than the standard Microsoft view, which is quite limited.

Information finding within Fresh is supported by a mechanism of topics and topics pages, and by a well-designed Documents Hub. Topics are created using the extensive tagging system within Fresh. For each topic, a dedicated page can be created, similar to Viva Topics. These pages bring a number of different Fresh web parts together in an intelligent way, to show latest news on a topic, related documents, and experts to ask additional questions. We also like the Documents Hub, which includes a list of trending documents and templates. A screenshot is included in the Highlights section.

# 6. Admin experience and governance



Access control to the various sites in the intranet is based on Microsoft's system of site permissions. During the implementation process, Content+Cloud will advise customers on a suitable architecture for the intranet and on sensible practices about who will have read, edit or admin permissions for various parts of the intranet. There is no admin functionality as such within Fresh; everything is managed using the Microsoft admin tools.

At the level of a departmental landing page or an individual content page, duly authorised editors will have full flexibility to create attractive layouts. The intuitive approach of modern SharePoint makes it easy to move web parts around and configure them in a consistent way. Fresh adds an extensive set of its own web parts, also with intuitive and consistent configuration panels. An interesting feature is that Fresh uses the site templates functionality in SharePoint to apply a custom site template to an existing SharePoint communication site. This is a quick and easy way to bring a pre-existing site into a Fresh-powered intranet.

Fresh includes a few useful reports to manage the content life cycle including a list of all pages coming up for review, with a similar report for documents. Both reports will be useful for intranet managers to do a regular health check of the content. A workflow to notify content owners is not included as standard in the product but can be set up by Content+Cloud upon request. There is also an individual report available to each content owner, where they see only the content that they own and when it's coming up for review.

Two approaches to offering multilingual content are available. Automated translation, using the Azure and Bing services, is possible in some areas such as news articles. Fresh also supports the standard Microsoft multi-language set up.



# 7. Analytics

Fresh offers a few basic reports around analytics and relies on Google Analytics and Azure Application Insights for more in-depth analysis. Fresh supports the standard SharePoint analytics that are available on every page; the information is well presented but basic. Fresh also includes an intranet content report that gives an overview of views, likes and comments on all pages and news articles. This report is useful but also fairly basic; there are no insights into activity by department, location or other relevant factors.

Another solution is to use Google Analytics, which will be a familiar product in many organisations. Fresh can send page information and user metadata to Google Analytics, and this can be transformed into reports and dashboards. Fresh does not include any off-theshelf dashboards as part of the product though, so clients will have to rely on their in-house knowledge to transform the data into useful reports.

For those organisations that prefer not to use Google Analytics, another solution is to use Azure Application Insights. During the implementation stage, Fresh sets up Application Insights by adding the relevant content types and metadata, so that these can be used as filters or to drill down deeper in the various reports that are available. This gives some interesting views of the number of page visits by department or office location, and the data can also be exported and processed in PowerBI. All of this is useful but it falls short of offering internal communicators real insight into the engagement with their news stories or campaigns.

Mandatory reads are supported by adding a checklist web part to a page or news article. This web part asks users to confirm that they have read the content, and reporting is available for a content owner to follow up, although it's not integrated with any of the other analytics options. The same is the case for search analytics: Microsoft offers useful reports to manage the search function, but they are again not integrated with other analytics.

# 8. Digital workplace integrations

SCORE

Out-of-the-box integration with external business systems is not an area of focus in Fresh. Some integrations are possible if they have an open API, such as integration with Transport for London or an RSS feed from The Guardian, to display information. There is also the ability for an integration with Workable for example, to show a list of open positions on the intranet, but integration with major business platforms is not part of the offering.

Content+Cloud says that Fresh offers the flexibility to easily set up additional integrations based on an open API upon request and that it is a strategic choice not to implement bespoke solutions, but rather stay aligned with Microsoft's integration mechanisms, such as third-party connectors in Power Platform and adaptive cards in Viva. We see the benefits of leveraging these new but promising technologies, although additional costs and effort may be involved.

When it comes to other collaboration tools, Fresh provides an integration with Workplace by Meta, in a way that is similar to the Yammer integration. Selected conversations happening in a Workplace group can be highlighted on a news article or any other content page within Fresh.

Clicking on the post will lead users into Workplace to participate in the discussion. No other integrations with platforms such as Slack or Box are provided.

In the area of federated search, Fresh has no functionality beyond the standard Microsoft Search capabilities. In this area there are also connectors on the market that make it possible to link into major business applications or EIM (enterprise information management) tools, typically at an additional cost.

# 9. Microsoft 365 integration

score 4.5

Fresh offers a broad range of integrations with the various applications in the Microsoft 365 ecosystem. Being built on SharePoint, the product makes extensive use of lists and document libraries for storing content. It's straightforward to pull news from other SharePoint sites into Fresh, or to reuse Fresh web parts on standard communication sites. Security in Fresh is fully based on SharePoint site permissions, and there is also a feature in

Fresh to show end users an overview of all SharePoint sites to which they have access.

Integration with MS Teams is also extensive. When Viva Connections is enabled, Fresh is accessed directly as an app within MS Teams. Sharing a news article into a Teams channel is straightforward, using the share button below each story in the news hub. The same button also allows users to post the article in a Yammer group. Just like for SharePoint sites, there is also a feature to show users an overview of all their Teams groups. This all works well, and a nice addition would be to bring notifications from Teams into Fresh, in some sensible place like this overview web part.

Yammer is integrated thoughtfully in a number of ways, as described earlier in Scenario 4. The integration with Viva Connections is further discussed in Scenario 10. Other elements in the Viva family such as Learning or Topics are not integrated into Fresh.

Fresh also has a number of useful overview web parts that combine information coming from different applications across Microsoft 365. A web part called 'My Workplace' aggregates information such as upcoming events, pending tasks and unread emails. The 'Launchpad' web part is another well-executed feature that brings together recent documents, email, and tasks from Planner. Worth mentioning is also the Fresh video web part that works with YouTube, Vimeo and Stream.

# 10. Wildcard

SCORE

Fresh has integrated extensively with MS Teams and Viva Connections, with a special focus on the mobile experience. The product builds on Microsoft's technology to create so-called 'adaptive cards' that are especially useful for displaying information on mobile devices.

When Viva Connections is enabled, Fresh will be accessible from the Teams app, and by clicking the Fresh icon, end users will land on the Viva Connections dashboard. By default, this dashboard offers only limited information and does not include any of the typical content that organisations want to push to frontline workers, such as relevant news



articles. We believe that Fresh fills this gap nicely by adding this content to the dashboard view. They have customised the dashboard experience by including four custom-built adaptive cards, as well as a link to the full intranet as a responsive site. The available adaptive cards include a card for news stories, one for announcements, another called 'My Microsoft 365' and a tools card. Details and screenshots are in the Highlights section.

We were impressed to see how Fresh is building on recent Microsoft technology to deliver an attractive mobile experience that can be targeted to specific audiences such as frontline workers. Content+Cloud says that they are part of a Microsoft partner program that gives them early access to new technologies such as the Viva adaptive cards, and therefore can be quick to deliver novel features. The Teams app plays a central role in Microsoft's strategy for delivering content to mobile users, and Fresh is an example of how that strategy is put into practice. Although some organisations will still prefer to have a dedicated intranet app, we believe that the approach taken in Fresh will appeal to organisations that follow Microsoft's roadmap closely and want to benefit from their investment into Microsoft 365 licenses.

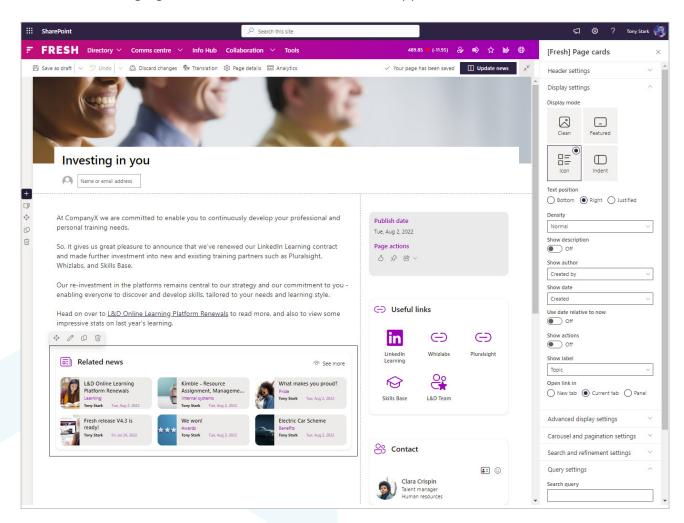


# **PRODUCT HIGHLIGHTS**

### Rich and flexible user interface

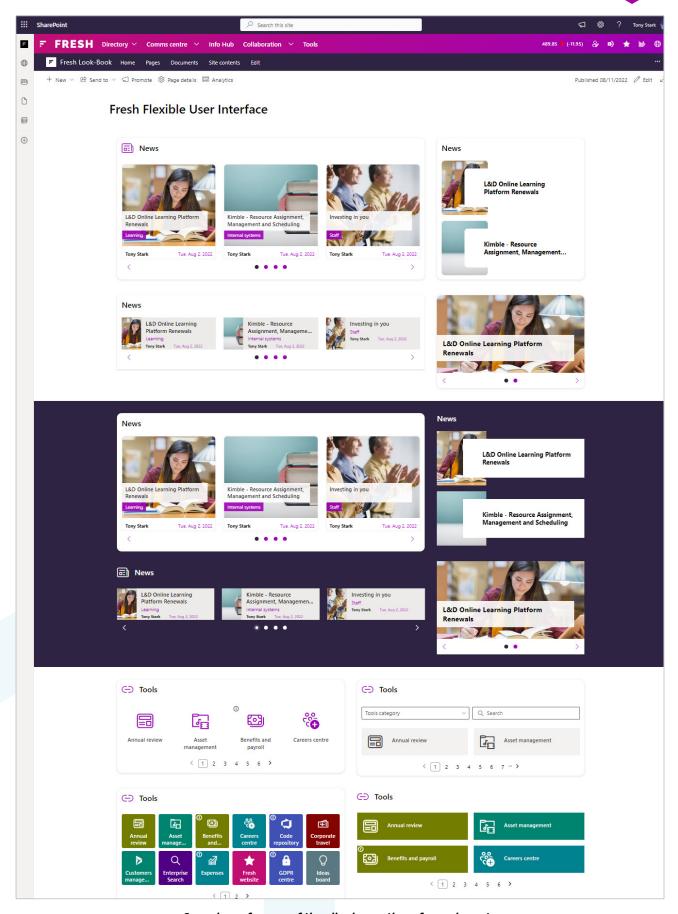
The user interface of Fresh has been thoughtfully designed. We especially like the eye for detail and the flexibility to fine-tune individual web parts.

A first illustration of this is how Fresh allows the appearance of its web parts to be customised. A range of options are available, some of them are illustrated in the two screenshots below. Web parts can have rounded or straight corners, sit in a container or not, have shadow applied or not, etc. This gives a lot of flexibility to organisations that have the appetite to adapt Fresh to their internal design guidelines or to create a distinctive appearance that stands out.



Setting the display options of the web part.

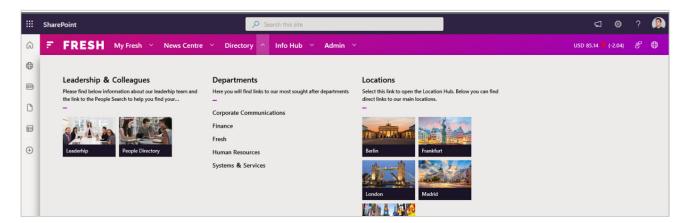




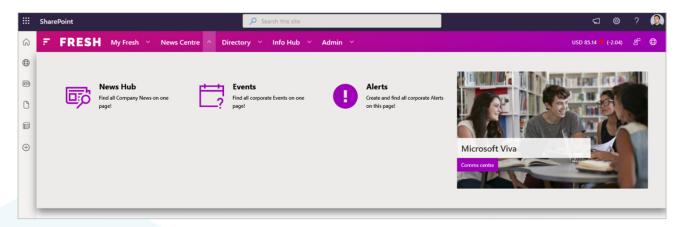
Overview of some of the display options for web parts.



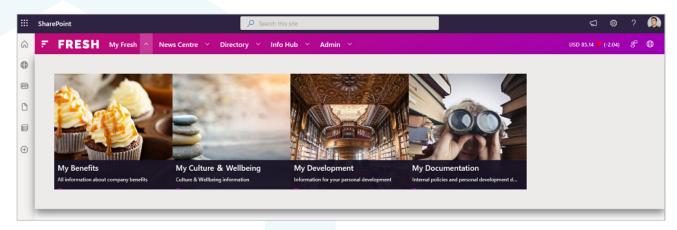
One area where Fresh stands out is in its implementation of a rich top-level navigation with visually bold mega menus. Intranet managers have a choice between many different layouts for the mega menu: a card-based layout with images, the use of branded icons, the possibility to promote any page or news article into the navigation, and a more traditional text-based layout. The screenshots below illustrate some of the options. Next to these visually bold options, more traditional dropdown menus are also supported. The standard SharePoint navigation is hidden by default but can be activated where needed, for instance on the site of a particular department or branch office.



Mega menu with a combination of text and images.



Mega menu with icons and with a highlighted page included.



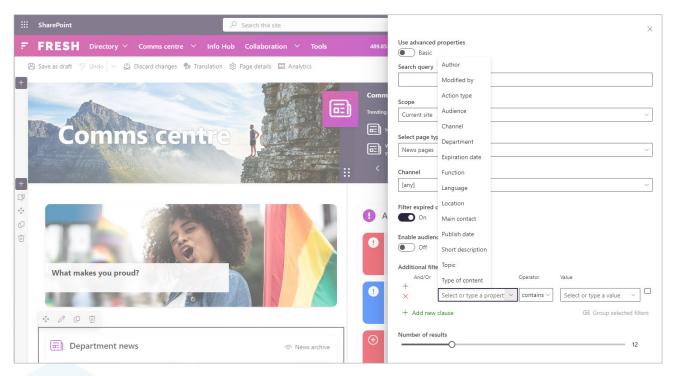
Mega menu with a card-based layout with large images.



### News

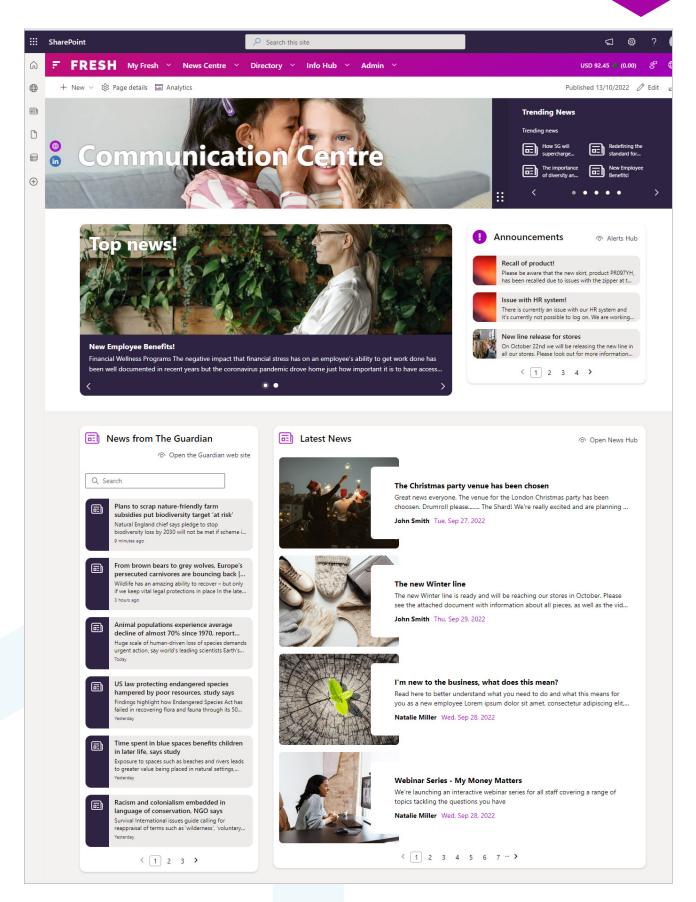
The functionality around news is extensive in Fresh. News articles are displayed in different ways, and some of the options are shown in the screenshot below. Important corporate news can be tagged as top news and shown in a dedicated area. The content is then either populated automatically or curated manually. Announcements form a separate category and are displayed accordingly. Other layouts can be applied to other types of news, and the web parts have a lot of flexibility built in to fit the taste of any internal communicator.

Tagging of news and audience targeting are an area of strength, where a rich set of metadata is set up and applied at creation time. A powerful feature is the possibility to create rule-based queries in the configuration panel. This query builder tool allows for a very precise selection of news articles to be displayed.



Rule-based queries are defined in the configuration panel.





Different layouts and flexible targeting are available.

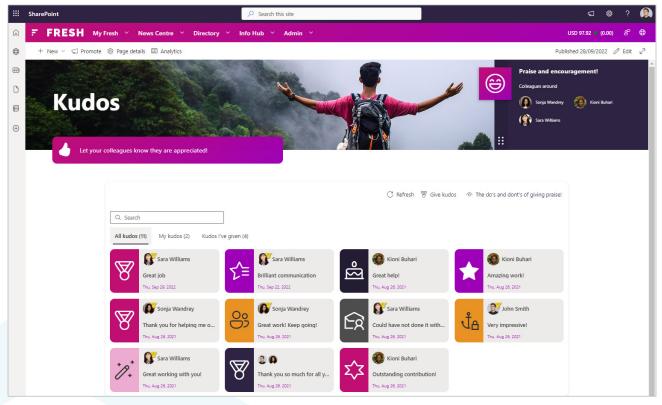


# Praise and recognition

Fresh includes a number of features for employee recognition and engagement that are well executed. Helpfully these features are also independent from Yammer, which is of benefit to those organisations who don't use Yammer as a social tool.

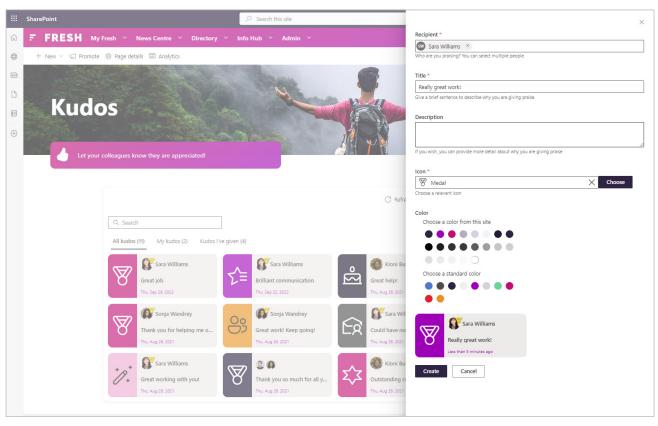
There is a central location on the intranet where all kudos can be viewed. From here, a simple form can be opened to create a new item, add some personalised text, choose an icon and a colour from a configurable set of options, and send it. People receiving kudos will see the message as it appears in their 'My profile' page. Optionally an email notification can also be generated.

A related feature is the possibility to assign badges to employees. The creation mechanism is similar to the kudos functionality, and badges will appear on people's profile page in the people directory. The search function in the people directory has a specific refiner for badges, so it is straightforward to find all people with a particular badge in the organisation. Badges can be assigned for different purposes. In the screenshot below, an award 'star of the month' has been given to an employee who is also a fire warden and a first aider.

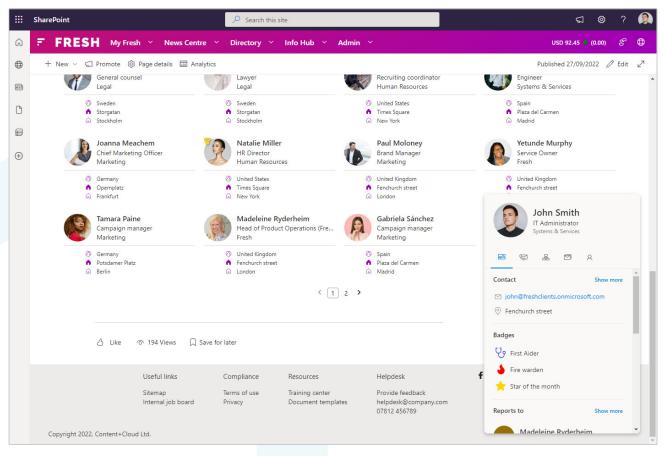


An overview page groups all kudos given within the organisation.





A simple form to create a new kudos.



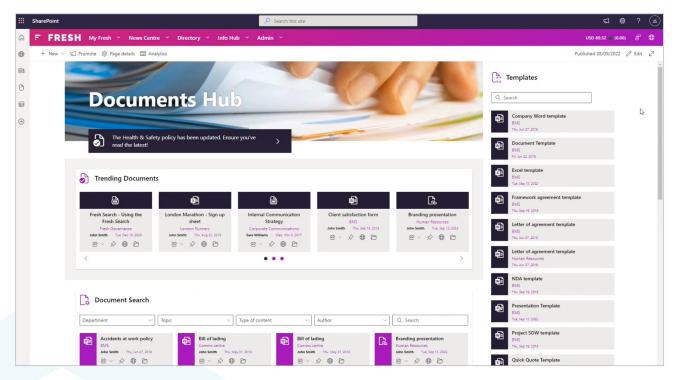
An employee's badges are shown in the people directory.



# Contextual search and topic pages

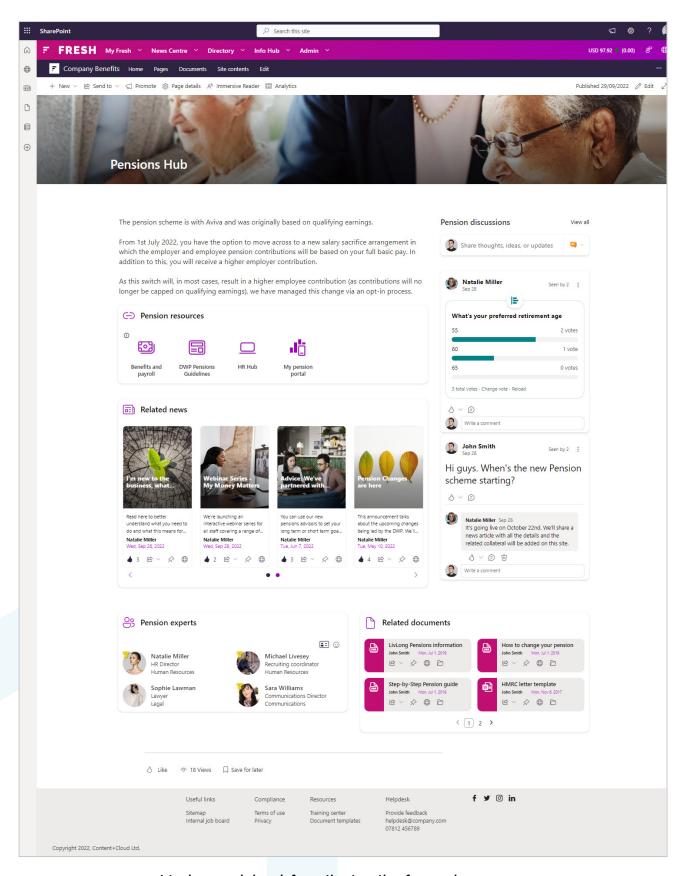
Fresh includes some well-designed features that support information finding by leveraging their extensive system of tagging and rich set of flexible web parts. Even though the global Microsoft search box is always available, Fresh includes a scoped-down contextual search box in several areas of the product. This goes hand in hand with specific refiners to narrow down the search results, or as an alternative to search. The screenshot below shows how this is implemented in the Documents Hub.

We particularly like the way Fresh has implemented the concept of topics and topic pages. Similar to what Microsoft offers in Viva Topics, Fresh includes the possibility to create rich content pages around a specific subject. Many of its web parts are brought together in a smart way to put a highly useful page together that includes news about a particular topic, related documents, experts on the subject, a conversation in Yammer, etc. As with Viva Topics, people can click on topic tags in associated pages to be brought to the topic page. However, unlike in Viva Topics there is no AI involved, so topics need to be created manually, but the result is equally compelling.



Documents Hub with contextual search and relevant refiners.





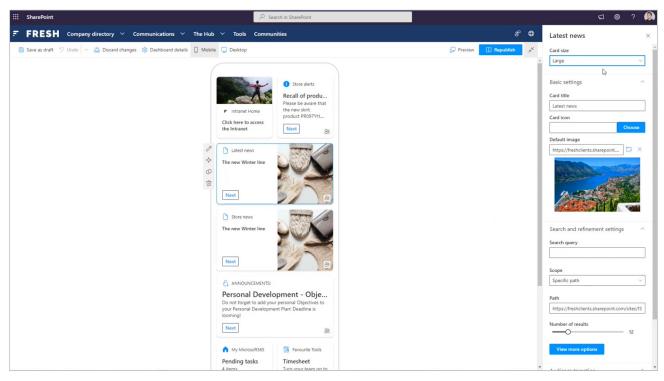
A topics page brings information together from various sources.



# Integration with Teams and Viva Connections

Fresh integrates well with MS Teams and Viva Connections, especially when it comes to delivering content on mobile devices. The highlight of their integration are four distinct adaptive cards that will appear in the Viva Connections dashboard within the Teams app.

A first card focuses on delivering news to mobile users. We especially like the flexibility that Fresh offers to configure this card so that only relevant news gets displayed to the right target audience. Setting up the configuration on the card is done in a dashboard in the desktop version of Fresh, as illustrated below.

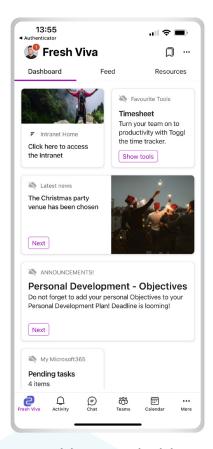


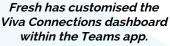
Configuring the adaptive cards within the desktop version of Fresh.

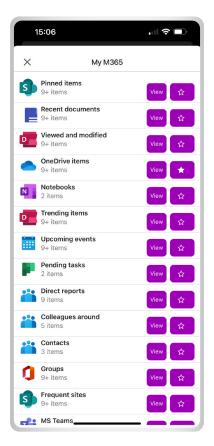


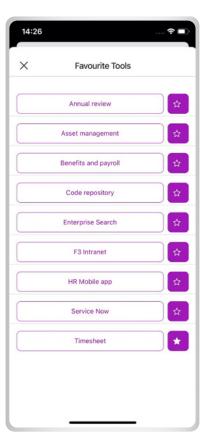
A second card brings relevant announcements into the dashboard. The third card is called 'My Microsoft 365' and shows information status coming from various Microsoft applications. A final card gives mobile users an overview of all relevant tools.

When used together, the four cards bring a sizeable subset of information from the desktop version of Fresh into the mobile experience This is a welcome improvement over the standard behaviour of Viva within the Teams app, which by default opens onto a dashboard view that contains little or none of the traditional intranet content. Fresh addresses this gap in the Microsoft offering in a thoughtful way, while staying aligned with Microsoft's vision to deliver mobile content via the Teams app rather than via a dedicated app.









Content of the Microsoft 365 and tools cards.

# THINGS TO BEAR IN MIND

Fresh is an attractive product that makes full use of SharePoint and other products in the Microsoft 365 ecosystem, such as Teams and Yammer. The product addresses some, but not all, of the gaps in Microsoft's intranet offering and in some areas, such as integration with third-party enterprise systems, the product is not so strong. Content+Cloud say that it is a conscious decision not to invest in areas where Microsoft has a separate offering or is planning to have one in the near future. This means that companies who want to integrate with business applications will have to rely on other solutions such as connectors in Power Platform, potentially at an additional cost.

Analytics is an area where the out-of-the-box offering is limited. The reports from Azure Application Insights are useful but will not be rich enough for most internal communicators. Google Analytics is supported but there are no off-the-shelf reports or dashboards included in Fresh, so clients are on their own. This is fine for larger organisations that have Google Analytics knowledge in house, but will be an issue for smaller companies who are looking for something built-in.

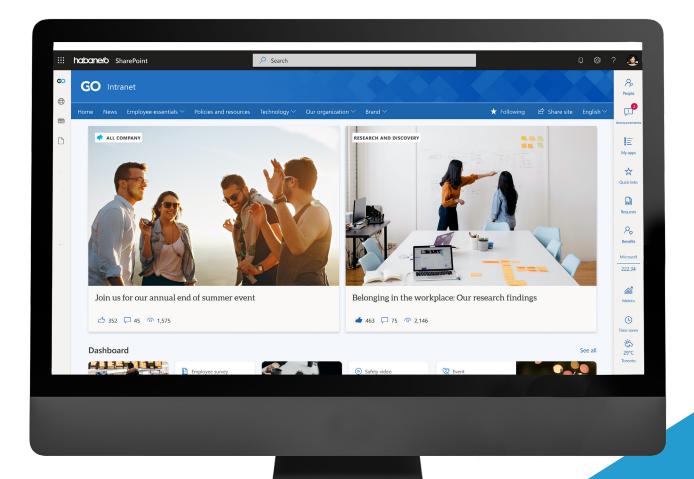
Mobile users are served through the Teams app and the responsive site. The lack of a dedicated mobile app will be an issue for some organisations, but Fresh compensates for that by offering some innovative functionality in the Viva Connections dashboard within the Teams app. This works well but is only useful in organisations that have Viva Connections enabled and where the Teams app is widely deployed.

# Why choose this product

Fresh will particularly appeal to organisations that have invested heavily in Microsoft 365 and that follow the Microsoft roadmap closely. Fresh is designed such that it nicely fills some of the gaps in the current Microsoft offering, while avoiding areas where the product could potentially stray from Microsoft's vision and roadmap. We believe that medium and large organisations that have the internal resources to stay on top of Microsoft's fast-moving offering, will benefit from a product like Fresh and will appreciate the innovations that it includes. For large organisations with more than 20,000 users, the pricing of Fresh becomes very attractive.







# Our view in one tweet

@GoIntranet is well designed, attractive, and stays close to modern SharePoint and M365.Comes with great analytics dashboards.



# GO Intranet owned by Habanero Consulting Inc.

GO Intranet, owned by Habanero (Vancouver, Canada) is a modern-looking, easy to use product. GO Intranet stays close to modern SharePoint and leverages other products in the Microsoft 365 ecosystem such as Teams and Yammer. The product addresses some of the gaps in Microsoft's intranet offering, most notably in the area of analytics, where a rich set of dashboards will appeal especially to internal communication managers. Other areas of strength include features around employee engagement and recognition, flexibility to manage news across the organisation, and a noteworthy digital asset portal that makes the product stand out.

In some areas we still see room for improvement. Out-of-thebox integration with third-party enterprise systems is limited; GO Intranet relies mainly on separate solutions like connectors in Power Platform. There is also no native app to support mobile users; GO Intranet addresses this concern by bringing intranet content into the Microsoft Teams app, either directly or through Viva Connections. Given the high price point, especially for smaller organisations up to 1,000 users, we would like to see more gaps in the current Microsoft offering addressed.

GO Intranet will be of interest to organisations that have invested heavily in Microsoft 365 and that use its various applications extensively. Corporate and internal communicators are especially likely to be enthused by some of GO Intranet's key features.



# Summary table of scenario scores

# NO. SCENARIO/SCORE 1 User experience and visual appeal 2 Mobile and frontline support Internal communication 3 Community and engagement 4 Information finding and knowledge management 6 Admin experience and governance Analytics 7 Digital workplace integrations 8 Microsoft 365 integration 10 Wildcard

## **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### PRICING MODEL

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, government / public sector, healthcare, frontline users, businesses over 20.000 users. Price includes: Project workshops, training for admins, training for end users, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / addons, access to a community & webinars, consulting services, employee research and insights, measurement and analytics planning and coaching, governance strategy and coaching, content strategy and coaching, classic to modern SharePoint content migration, usability testing with employees.

# Key benefits

- The user interface design is attractive and closely follows the Microsoft design guidelines, so web parts from GO Intranet mix well with standard SharePoint web parts.
- News management is flexible and can be adapted to an organisation's centralised or distributed approach to news publishing.
- There are several thoughtful features around employee engagement and recognition.
- A range of analytics dashboards are available and will be useful especially for internal communications managers.

# Improvements and considerations

- There are very few out-of-the-box integrations with external business applications.
- Top level navigation and branding rely on standard SharePoint features and are less flexible than in other products in this report.
- Go Intranet does not include a native app; mobile users are served via the responsive site and by bringing intranet content into the Teams app, either directly or through Viva Connections.



# **Product type**

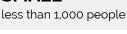


# **Branding opportunities**



# Target businesses







MEDIUM 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems



Fully standalone



Requires SharePoint



Optionally works with SharePoint



Other

# **Sectors**





Energy and utilities



Property and construction



Transport and logistics



Public services, government and administration

# You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



#### Company

Habanero Consulting Inc.



#### Company founded

1996



#### **Company locations**

Vancouver, Canada. All other offices are in Canada.



#### ISO 27001 certified

No



#### Typical client size

GO clients typically have 5,000 to 20,000 employees.



# Largest deployment so far

80,000 employees (please see their website for details).



#### Partner locations

All implementations are completed by Habanero.



#### Customers

Clients include: APOTEX, Barton Malow, Coast Capital Credit Union, Flight Centre, Greater Toronto Airports Authority, Sleep Number, TC Energy, Toll Brothers, QuadReal, Wawanesa Insurance

# Product and technical details

Name of product	GO Intranet
Product launched	2016
Current version	8
Accessibility	WCAG 2.1 compliant



# Deployment

#### Data residency

N/A

#### Client data encrypted

In transit only	In transit and at rest	At rest only
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### **Authentication supported**

Azure Active Directory	ADFS	Open ID	Oauth	G Suite	Other*
* Okta					

## Search technology

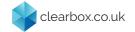
Apache Lucene/ Solr Elastic	Microsoft	Vendor's own	Other
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## Document library sources integrated

# SharePoint/0365 versions supported (if applicable)

SP Server 2016	SP Server 2019	SP Server Subscription Edition	SP Online	Viva Connections
Mobile app deployment				
Google Play store	Apple store	MDM	МАМ	Other*

 $<sup>^{\</sup>star}$  GO intranet is accessed via the MS Teams app.



#### Reverse-out options

Habanero do not store client data. GO is deployed into each client's Microsoft 365 tenant and all intranet data is stored in SharePoint Online using native SharePoint objects including Lists, libraries, and pages. If a client no longer wishes to use GO, they simply remove GO and all data would continue to be available and accessible in their SharePoint Online tenant.

#### Languages supported

All languages supported by Microsoft 365 and SharePoint Online.

#### Machine translation

Not via the product – it's whatever the browser / base system does.

#### Right to left script

Yes

# Set-up and support

#### Set-up process for new clients

Each GO subscription is packaged with a Quick Start implementation engagement that includes everything a client needs to create a thriving intranet. A Quick Start typically requires 11 to 14 weeks and includes research, information architecture, design, usability testing, measurement planning, training, and governance.

#### **Product updates**

There are three major GO releases per year.

#### Product update process

GO clients receive one or two upgrades per year based on their subscription level. Habanero work closely with each client to determine the best timing for their upgrade and respect each client's specific change policies and procedures. All new features are demoed to the client before any upgrade begins, and a client-specific test environment is first upgraded to support additional testing and change management activities before the upgrade is deployed into production.

#### Technical support

All GO subscription clients receive unlimited support from the Habanero in-house Intranet Success and Support team. Support is provided during North American business hours and extended international support is available upon request.

#### User community

Each GO subscription includes access to a community site. Habanero also host webinars and roundtables for clients and publish a monthly newsletter with helpful information on how organisations can create a better workplace.



#### In their own words

Habanero says: "GO Intranet is a feature-rich, customizable intranet product built for Microsoft 365 and Microsoft Viva. Using a human-centered design approach, GO creates connected, collaborative employee experiences that transform the way people work. Every GO intranet comes with unlimited support, worry-free upgrades and deep measurement and analytics to help you uncover actionable insights."

# Their view of the marketplace

Habanero says: "To solve today's toughest challenges your employees need digital workplace experiences that support them wherever they're working, whether it's remotely, in the office or in the field. Information overload, noisy digital workplaces and disconnected experiences decrease employee wellbeing and productivity. GO provides a foundation for a great employee experience within Microsoft 365 that is personalized and precise, brings together tools and digital experiences and creates a culture of connection and recognition."

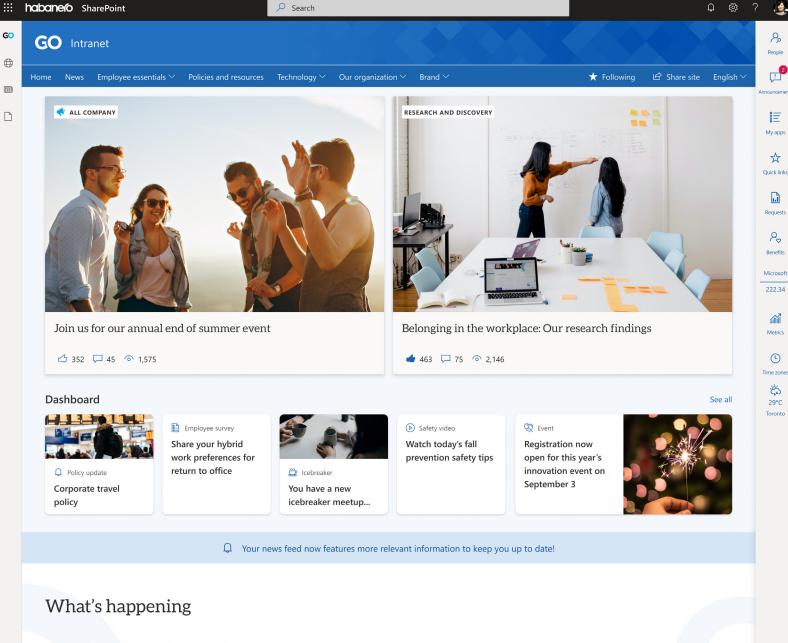
## Voice of the customer

When asked what they like about the product, customers mention most often the intuitive design and the seamless integration with SharePoint. As one customer puts it: "Sleek and modern responsive design, coupled with multiple social features that employees can engage with." Another customer praises "the seamless integration with SharePoint – they complement each other well and end users have a cool experience". Some customers are in the process of migrating from Classic GO (based on classic SharePoint) to the current, modern GO Intranet product, and they have similar comments: "We are moving to modern GO so that our intranet connects more seamlessly to our other modern SharePoint sites. The user experience is better and it's easier to edit content."

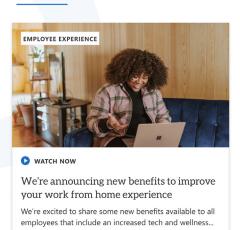
We did not receive many improvement suggestions, although some customers want more flexibility around the use of photos in some of the GO Intranet web parts: "We would like an easier solution to add photos to accordions and tab switchers, to events pages, etc." says one customer, while another requests "better control and options for site images". Some customers also want more flexibility to go beyond the standard features of modern SharePoint, for instance "more options for fonts and access to HTML code for authors".

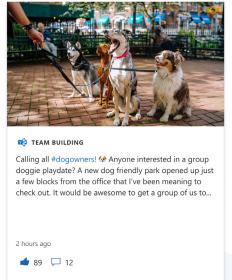
Working together with Habanero is universally praised. "They are knowledgeable and keep up to date on changes in the industry" and "we truly enjoyed partnering with them to design and launch our intranet" are some of the comments we received. The expertise and work culture of the people at Habanero is often highlighted in the feedback: "The expertise of everyone and the willingness to solve problems is wonderful." Or as one customer sums it up: "Everyone clearly loves working there and is an expert in their field."

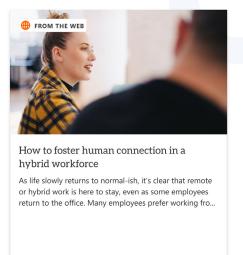


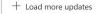












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占 LONDON
5 minutes ago

# **REVIEW**

# 1. User experience and visual appeal

SCORE 3.5

The user interface of GO Intranet is attractive and modern-looking. The product stays very close to the look and feel of modern SharePoint, and adheres to Microsoft's standards and guidelines such as the 'fluent design' principles. As a result, web parts from GO Intranet can sit side by side with standard SharePoint web parts to form coherent, visually appealing pages. An intelligent additional UI element is a persistent right-hand toolbar called 'Springboard'. This compact

interface gives direct access to often-used functionality, including notifications, links to external systems, people search, and configurable widgets for stock prices and weather.

Navigation relies mainly on standard SharePoint features but GO Intranet complements these with additional elements. Top-level menus reuse the standard functionality from SharePoint communication sites and hub sites, which means that there is a certain level of complexity for end users to deal with. Habanero realise this and have introduced their own navigational guidance within the pages themselves, such as a right-hand side navigation widget that leads users to subpages of the current page. We like the design of this widget and believe it complements the standard SharePoint top-level menus well.

Notifications are handled as part of Springboard, where time-critical announcements are grouped. There are also other types of notifications within the product, such as alert messages that appear as a banner on the top of the screen, or notifications within the Viva Connections dashboard, which is easy to integrate within the product. Another feature is that SharePoint's common email notifications can optionally be turned into notifications in Teams, so that they are less likely to be overlooked. Overall, several notification mechanisms coexist but we believe that the product would benefit from a more coherent approach.

Branding of GO Intranet is handled through the standard SharePoint feature of creating a custom theme and applying it to the hub site. If a different sub-brand is needed, then this is achieved by setting up an associated hub site that has its own logo, banner image, colour scheme, and fonts applied. Branding options in standard SharePoint are limited, but Habanero say that most of their customers accept these limitations and are happy to stay within the SharePoint framework.



# 2. Mobile and frontline support

SCORE 2+

Mobile and frontline support are provided through a responsive site and by leveraging the Microsoft Teams app; a dedicated intranet app is not part of the offering. Habanero say that it is their strategy to leverage the well-established MS Teams app, rather than develop their own.

Access to the mobile site, just like access to the desktop version, requires a Microsoft licence and credentials. Any licence that includes access to SharePoint online is fine, so frontline workers can be equipped with Microsoft's F1 licences that are optimised for frontline usage. No other methods to enrol are supported.

The responsive site displays well on mobile, as one would expect from a product that closely follows the Microsoft design guidelines. All web parts adapt in a logical and user-friendly way to the reduced available space. Administration is done at the level of each web part, in a way that is very similar to configuring a standard SharePoint web part. A Springboard button is integrated at the bottom of the screen, above the standard Microsoft menu; pressing the button opens up the various elements integrated in Springboard. This works fine, but an improvement would be to hide the standard Microsoft icons, which are not very useful in this context, and replace them with the icons in Springboard.

The product does not include any specific features for frontline workers, but it is possible to target content and web parts to a frontline audience. Also, the Viva Connections dashboard is supported, which can include relevant information for frontline workers such as shift schedules or tasks assigned. Please see Scenario 4 for community features that work well on mobile too.

Another way to reach frontline audiences is through Microsoft's Teams app. GO Intranet does this in different ways: the full intranet is available as an app in MS Teams, the product supports Viva Connections, and individual web parts such as the news web part can also be integrated as a Teams app and appear within the Teams navigation. We like this modular approach, rather than presenting frontline workers a monolithic intranet, GO Intranet has the flexibility to integrate only those building blocks that make sense.

# 3. Internal communication

score 3+ GO Intranet stays very close to the standard SharePoint functionality again in this scenario, addressing the needs of internal communicators with a few nice additions to make the experience more user-friendly.

The starting point for creating a news story is the intuitive 'Add content' wizard which is part of Springboard. From there, the news author is brought into the standard modern SharePoint environment for creating a news story page,

which is intuitive and feature rich. GO Intranet adds a few nice touches, such as a widget with helper text that gives guidance to the content creator. Approval workflows and scheduling use SharePoint's out-of-the-box functionality. Other useful features, such as archiving, are not part of the product but can be added using Power Automate.

GO Intranet comes with a choice of two web parts to display news. There is a rather traditional news web part that displays up to three articles, and there is a richer 'What's Happening' web part where news is aggregated from different sources, including Teams and Yammer. Metadata is easy to set up, and end users have a choice of categories of news they want to subscribe to.



There is also a mechanism to securely target content to specific audiences such as managers. A news centre is available that offers extensive search and filtering options, but the product does not include any other tools for managing the editorial process.

The process for creating static reference pages is the same as for news stories. Templates for content pages and news articles are routinely set up by Habanero in line with client needs during the implementation process; admins can add further templates later.

Crisis communication is handled well through alert messages that appear at the top of the screen. These can be categorised and colour-coded, and their behaviour adapted to the urgency level. For instance, it's possible to dismiss regular alerts, but not critical ones.

News can also be sent out as a newsletter digest, will appear in the SharePoint app, and also be made available in the Teams app by integrating a GO Intranet web part into Teams, as discussed in Scenario 2. Other options, such as integration with a digital signage system, are not part of the product.

# 4. Community and engagement

SCORE 3.5

GO Intranet relies heavily on the standard features of SharePoint and especially of Yammer, but it also adds some useful enhancements, particularly around engagement and recognition.

Collaboration in communities is based on Yammer, which has been integrated into GO Intranet in a couple of ways. Content from Yammer can be pulled into GO Intranet through a 'What's Happening' web part as discussed in Scenario 3.

Yammer commenting can replace SharePoint commenting if desired, which allows for richer social reactions. There is also a possibility to pull in the comments from a particular Yammer thread onto a static content page within GO Intranet. Overall, we find the Yammer integration well executed and helpful for employees who may otherwise not bother with 'yet another tool'. Still, relying on Yammer means that administrators will have work to do in both systems, for instance setting up an innovation community in Yammer and then pulling it into GO Intranet in a logical place.

GO Intranet includes simple functionality to run a survey or a quick poll, or to collect feedback. The feedback mechanism is also integrated into the help section of Springboard and into the search functionality, all in a consistent way.

An engagement feature that we particularly like is 'Our culture in pictures'. More than just a traditional photo gallery, this web part allows users to upload and browse photos, and has integrated liking and commenting capabilities. Uploading a photo is straightforward, also on a smartphone, so it's easy for frontline workers to use this in various scenarios, for instance to share progress on a construction site or show the opening of a new store. There is also a feature to report inappropriate photos.

Several other engagement-related features are also available, such as events template for team building or other group activities, and a recognition feature that allows recognised employees to print out a physical certificate. Details and screenshots are in the Highlights section.



# 5. Information finding and knowledge management

SCORE 3.5

GO Intranet is tightly linked to the Microsoft 365 ecosystem, so Microsoft Search is the logical choice for the main search experience. The standard search window is available at the top of the screen, so intranet users have direct access to all the features that come with Microsoft Search, such as promoted results on the search results page. Management and configuration are done through the Microsoft tools. GO Intranet provides additional

customised search experiences in a number of areas such as the news archive or the policies and resources area. A contextual search box in combination with faceted filtering make it easy and intuitive to find the right information.

Finding people is possible via the standard search window, but GO Intranet includes a dedicated interface as part of Springboard. The top icon is called 'People' that opens a contextual search window and a search results area, all neatly integrated into the toolbar. People cards with customised information can be viewed here. There is no organisation chart in the product, other than what Microsoft includes out of the box, which is basic.

Knowledge finding in GO Intranet benefits from a well-designed 'policies and resources' area. Apart from offering a contextual search, this template includes many other ways to discover and manage content. Documents are grouped by type and by topic in a way that can be customised for each client, and then browsed by end users. Users can pin often-consulted policies to the top of the page, and there is an area where frequently viewed documents and recently modified documents are pulled together. There is also a useful accordion web part in the product that is used to divide lengthy content into sections, or for an FAQ.

# 6. Admin experience and governance

SCORE 3.5

Site-level administration of GO Intranet is handled using the various Microsoft 365 and SharePoint admin tools. For instance, taxonomy and the metadata used in the product are managed in the term store, while site permissions are based on the standard mechanism of groups stored in Azure AD. To help administrators find their way around, the product conveniently includes a 'GO Administration' page, where links to all the various admin areas are nicely

brought together.

Managing the home page or a departmental landing page is straightforward. The intuitive approach of modern SharePoint makes it easy to move web parts around and configure them in a consistent way. Content creators can mix and match web parts from GO Intranet with standard SharePoint web parts. All GO Intranet web parts are configured through intuitive and consistent configuration panels. A nice feature is that departmental or section pages can be setup with an automatically created area for navigation to lower-level pages, as an alternative to Microsoft's top-level navigation.

To help with managing the content life cycle, the product includes a report that lists outdated content. Like in many other areas in the product, filtering options allow this report to be further refined, for instance by focusing on content owned by a particular person. The report works with standard SharePoint metadata, such as the last modified date, but there is no feature in GO Intranet to set an explicit expiry date. There are also no workflows to facilitate the review



process, but these can be created using Power Automate.

Multiple languages are mainly supported through standard SharePoint features, which work well for most types of content. GO Intranet extends the SharePoint translation mechanism to its own web parts. Content that is stored by GO Intranet in SharePoint Lists, such as alerts and announcements, is also translated and displayed based on the selected language. Automatic translation is not foreseen within the product.

# 7. Analytics

SCORE

Analytics is an area of strength in GO Intranet; the reports and dashboards that are available are some of the most extensive and valuable among the products in this report.

Apart from the built-in SharePoint analytics, which are limited, GO Intranet is fully integrated with Google Analytics and Google Tag Manager. To turn the collected data into useful insights, GO Intranet includes an impressive set of

dashboards built in Google Data Studio. There are various metrics about usage adoption and interaction with the content, including news articles. Analytics on search are nicely integrated as well, and there is also a report about the usage of Springboard. Details and screenshots are in the Highlights section. The standard dashboards are typically fine-tuned and adapted to the client's needs during the implementation process.

In parallel with these Google-based dashboards, GO Intranet includes an additional module for content engagement analytics. These reports focus exclusively on news articles and will be of interest mainly to internal communicators to track the success of their campaigns. Included are reach and engagement numbers, and also some innovative features for language and sentiment analysis. Details are again in the Highlights section. Unlike the Google dashboards, this module does not rely on Google Analytics being activated, so organisations that prefer not to use Google Analytics will still benefit from these engagement reports.

Mandatory reads are not part of the product; Habanero say that this is on their product roadmap.

Search analytics are integrated into the Google Data Studio dashboard and are extensive. There are reports about search volume over time, top queries, queries with a promoted result and queries with no results.

# 8. Digital workplace integrations

2.5+

Out-of-the-box integrations with external business systems are limited in GO Intranet. There is an integration included with ServiceNow, and this is nicely presented within Springboard. New tickets, as well as items in progress, are listed in the Springboard area. The information is not actionable within GO Intranet though; clicking on an item takes the user into ServiceNow. There is a similar integration with Tenrox from Upland, which displays HR-related

information, such as available vacation days, in Springboard. Habanero say that a similar integration with Workday is on the product roadmap. Springboard also includes widgets with



external information such as stock prices or current weather.

As a generic mechanism, the Viva Connections dashboard is easy to integrate into the product, so the dashboard cards provided by Microsoft and third parties will be fully supported. GO Intranet does not include any cards within the product, so customers will have to rely on products from third-party providers.

GO Intranet does not include any integrations with non-Microsoft communication or collaboration tools such as Slack or Workplace by Meta.

In the area of federated search, GO Intranet does not offer any functionality beyond the standard Microsoft Search capabilities. Habanero say that they will work with clients during the implementation process to configure the scope of Microsoft Search. Connectors are on the market to link into major business applications or EIM (enterprise information management) tools, typically at an additional cost.

# 9. Microsoft 365 integration

score 4.5

GO Intranet offers a broad range of integrations with the various applications in the Microsoft 365 suite. Being built on SharePoint, the product makes extensive use of the platform. Content is stored in document libraries and Lists, and web parts from GO Intranet mix seamlessly with standard SharePoint web parts. It's also straightforward to pull content from other SharePoint communication sites into GO Intranet, or use GO Intranet web

parts elsewhere within the Microsoft 365 tenant. In areas where the standard user interface of SharePoint is not so strong, GO Intranet complements it with additional functionality such as a content creation wizard and the Springboard.

Integration with Teams is possible through Viva Connections, which brings the full intranet into the Teams environment. Another option, as discussed in Scenario 2, is to integrate individual web parts, such as the news web part, as an app into Teams. This works well, but an additional feature that we would like to see is an option to share an individual news article published on the intranet straight into a selected Teams channel.

The product integrates in different ways with Yammer, as discussed in Scenario 4. The integration with Viva Connections makes it possible to bring GO Intranet into Teams and to bring the Viva Connections dashboard onto an intranet page. Power Automate is used in a number of places within the product, for instance to bring email notifications generated by SharePoint into Teams. Worth mentioning is also an integration with Stream for news articles; when a video is embedded in a news story, the story automatically appears with a label 'Watch Now' in the news web part. This makes it immediately clear to employees that a video is included. Finally, there is also an interesting integration with PowerPoint, which is discussed in Scenario 10.



# 10. Wildcard

SCORE

GO Intranet includes an attractive feature called 'GO Brandmate', which is at additional cost but included in the pricing submitted for this review. It is designed to help corporate communications and branding teams promote the correct usage of corporate brand elements, and to help users apply the brand elements in their PowerPoint presentations.

The solution consists of two parts. The first element is an online brand guide, which has a set of templates and libraries included in the product that will be used by the corporate communications or brand team. Based on the templates they can create an area on the intranet where all brand-related information is stored, similar to what you would expect in a fully-fledged DAM (Digital Asset Management) system. Information and resources stored include company logos, colours, icons, photography, and more. Details and screenshots are in the Highlights section.

The second element of the solution is a PowerPoint plug-in that connects to the libraries of the brand guide and displays the content as a right-hand side panel in PowerPoint. When creating a new presentation, employees can easily select appropriate images, icons, and other visual elements from the panel. Search and filtering options are available in the panel, so users can drill down and find appropriate imagery that is company-approved, rather than resorting to a search on the internet. We like this integration with PowerPoint but we believe that even more value could be generated if a similar integration were available on the intranet itself, especially in light of some customer requests (in the Voice of the Customer section) to have more flexibility to insert images.

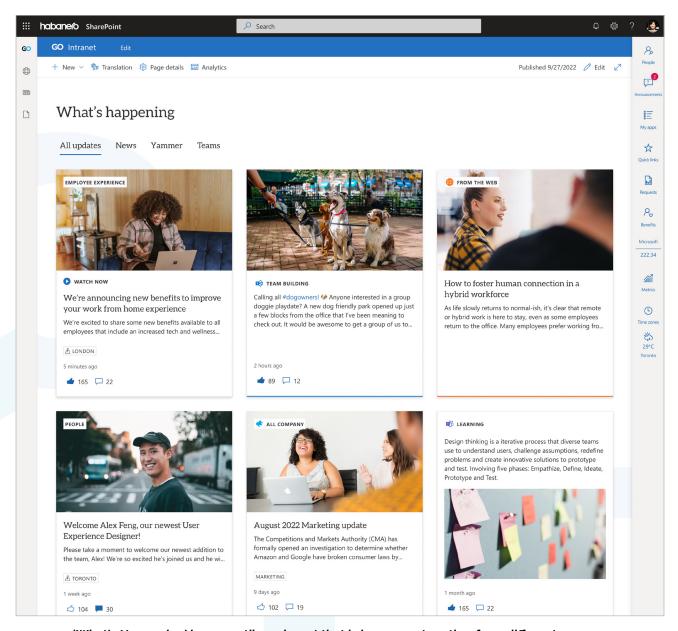
We can see how corporate communication managers will be enthused by the features of the brand guide and the PowerPoint plug-in. It's an opportunity to bring corporate branding rules, often stored on an intranet as a dull PDF, fully to life. While it does not offer all the functionality of a fully featured DAM system, GO Intranet does provide an attractive solution for a specific use case.



# **PRODUCT HIGHLIGHTS**

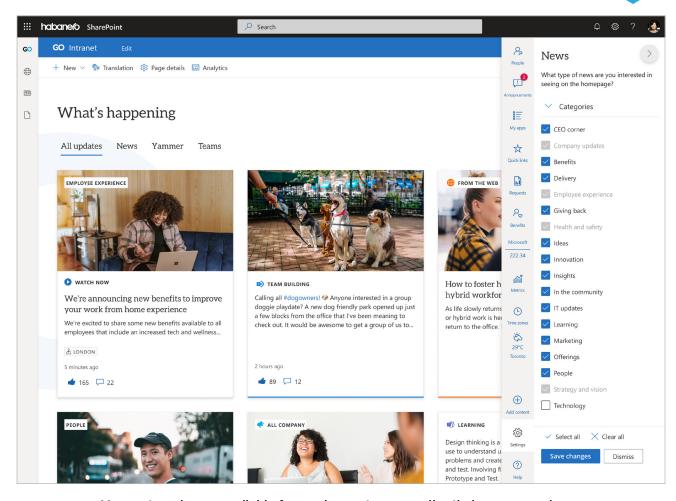
#### News

GO Intranet stays close to standard SharePoint functionality to create, target and display news articles, with some additional web parts and features to make the experience more user-friendly. We like the flexibility of the 'What's Happening' web part to display news from different sources in a way that is both targeted and personalised. Audience targeting based on Azure AD groups is possible, and there is also a mechanism for users to set preferences about the categories of news that they are interested in. The web part also rolls up items from Teams and Yammer, making it the central go-to place for employees to get up to date on news from across the organisation.



'What's Happening' is a versatile web part that brings news together from different sources.

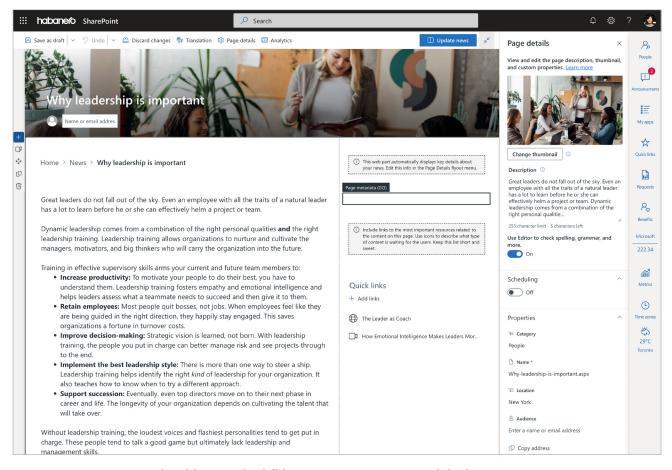




Many categories are available for employees to personalise their news experience.



To create a news article, GO intranet relies heavily on the standard SharePoint user interface and adds a few useful touches. The page layout includes a number of help widgets, only visible to content creators. These widgets explain the purpose and the functionality of the web parts on the page; the screenshot below shows help text for the 'About this page' and 'Quick links' web parts.

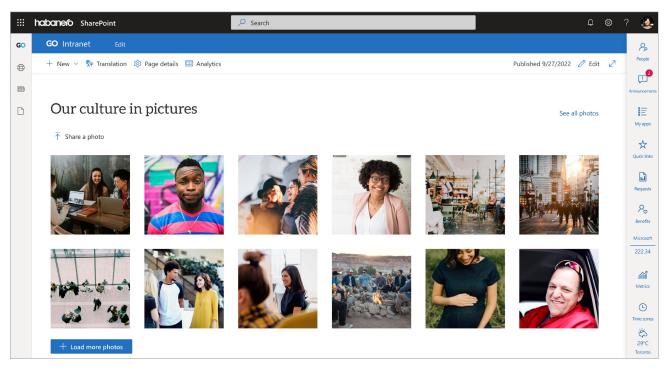


Help widgets, only visible to content creators, explain the purpose and features of the web parts on the news creation page.

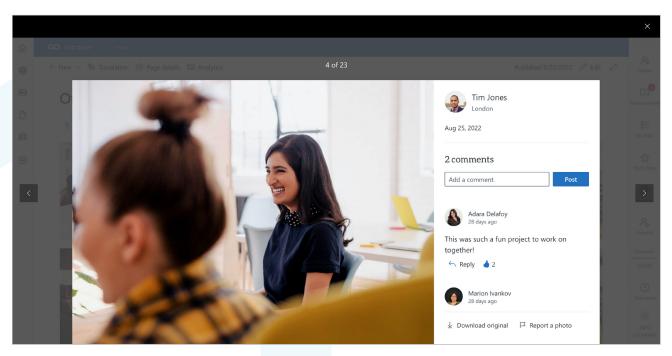


# Engagement

GO Intranet includes various features around engagement and recognition of employees. A feature that we particularly like and that was described in Scenario 4 is 'Our culture in pictures'. It enables employees to post photos on a variety of topics, with a possibility to like and comment on the pictures.



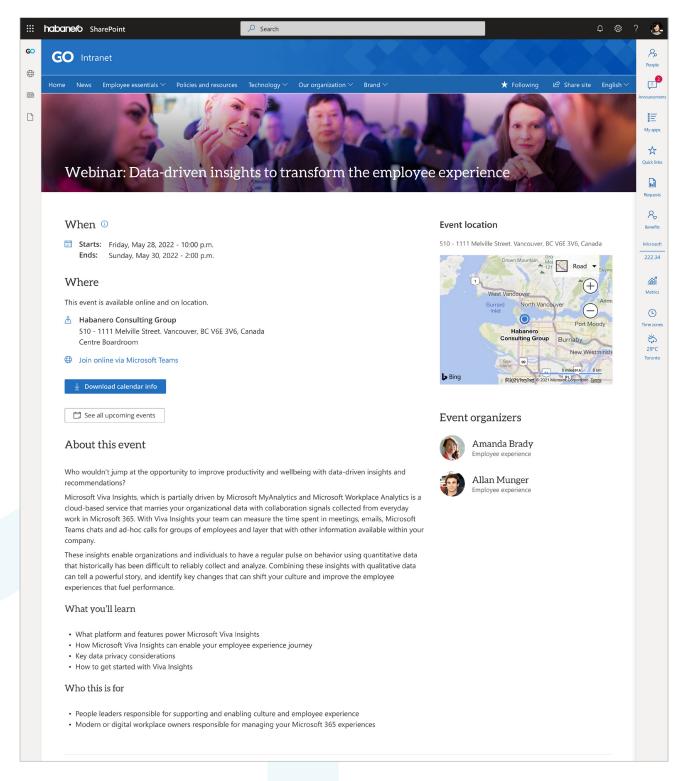
'Our culture in pictures' is an interactive photo gallery that allows employees to upload pictures for others to see, like and comment.



Pictures are shown in an attractive lightbox view and have an area for likes and comments.



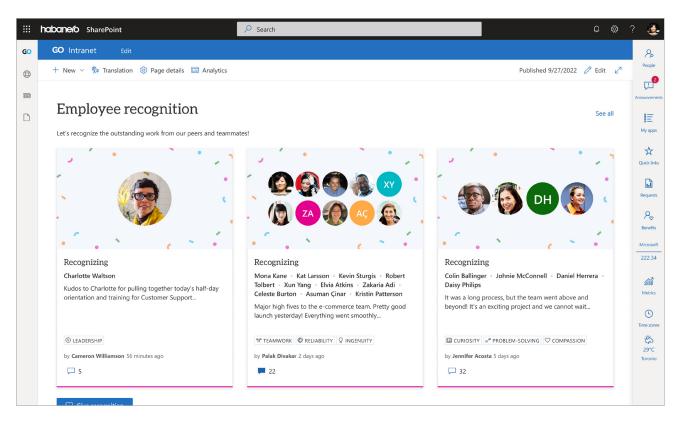
GO Intranet's event pages are designed to increase employee participation and engagement. Events are often handled as entries in a standard Outlook calendar, but GO Intranet takes them to a higher level by adding additional capabilities. The basic calendar info is enriched with a description of the event, information about the location (including a map), an event category, and a possibility to like and comment.



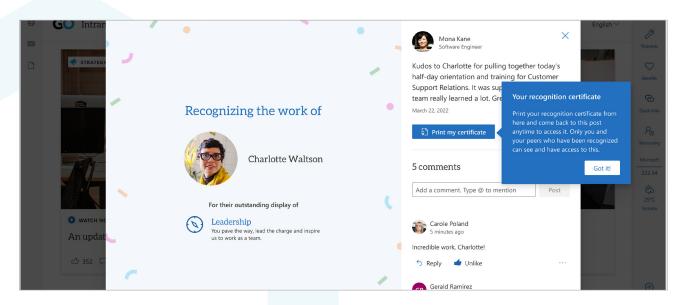
Event pages bring information about an event together on a single page and include the possibility to comment.



The product also includes some thoughtfully executed features around employee recognition. Any employee can recognise one or more colleagues by going through a simple step-by-step wizard. Results are displayed in a web part that can be placed anywhere on the intranet, including the home page, for other employees to see and comment. As part of the wizard, recognitions are optionally associated with categories, which can represent the key corporate values that the organisation is promoting. There is also the possibility for an employee to print out their certificate on paper.



The Recognition web part shows the latest recognitions given, with the option to comment.

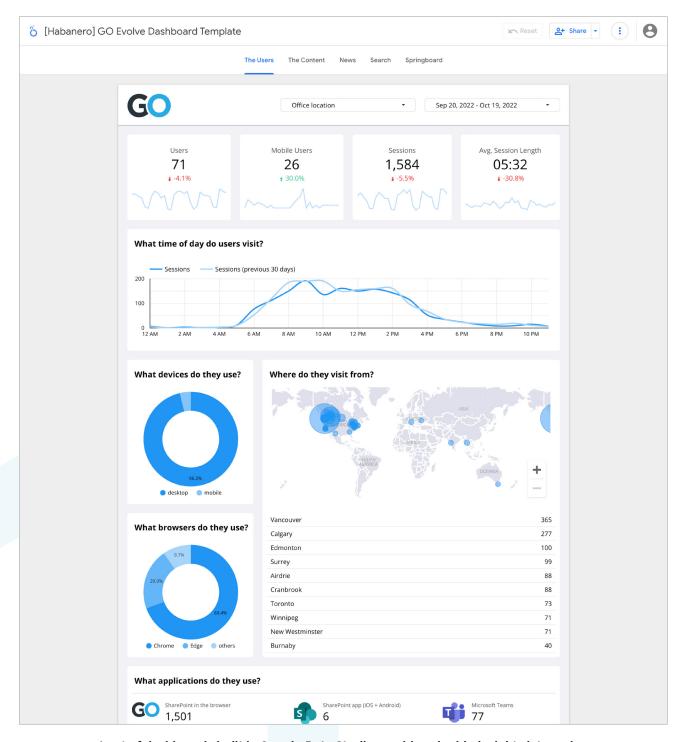


Recognised employees can print out their certificate.



# **Analytics**

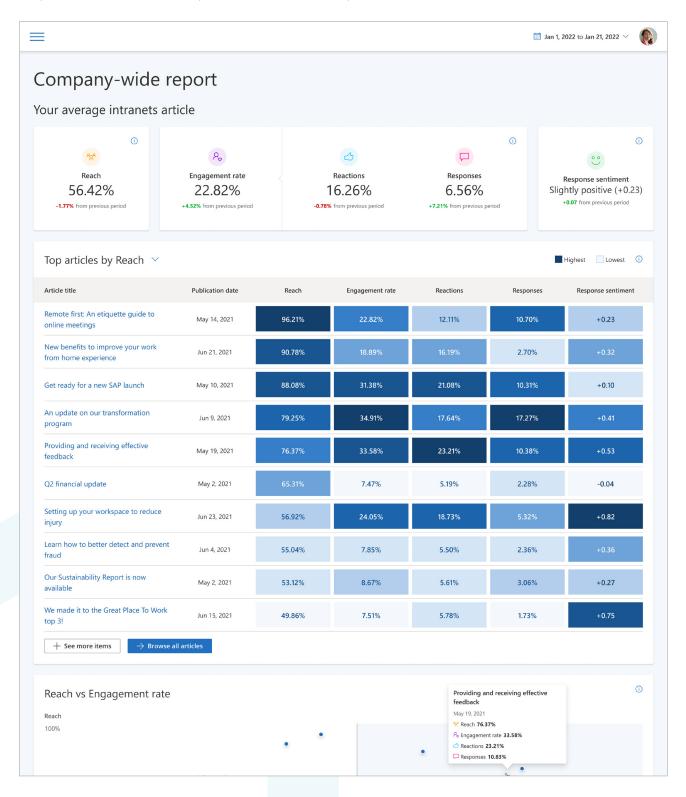
Analytics in GO Intranet go well beyond the standard offering of SharePoint. The product includes a rich set of dashboards that are built in Google Data Studio and rely on data coming from Google Analytics and Tag Manager. There are various metrics about usage adoption, interaction with the content, news, search and Springboard. The screenshot below shows the Users dashboard, containing information about users' location, devices and browsers used, and the most popular time of day to visit the site.



A set of dashboards built in Google Data Studio provide valuable insights into various areas of the product; the users dashboard is shown here.



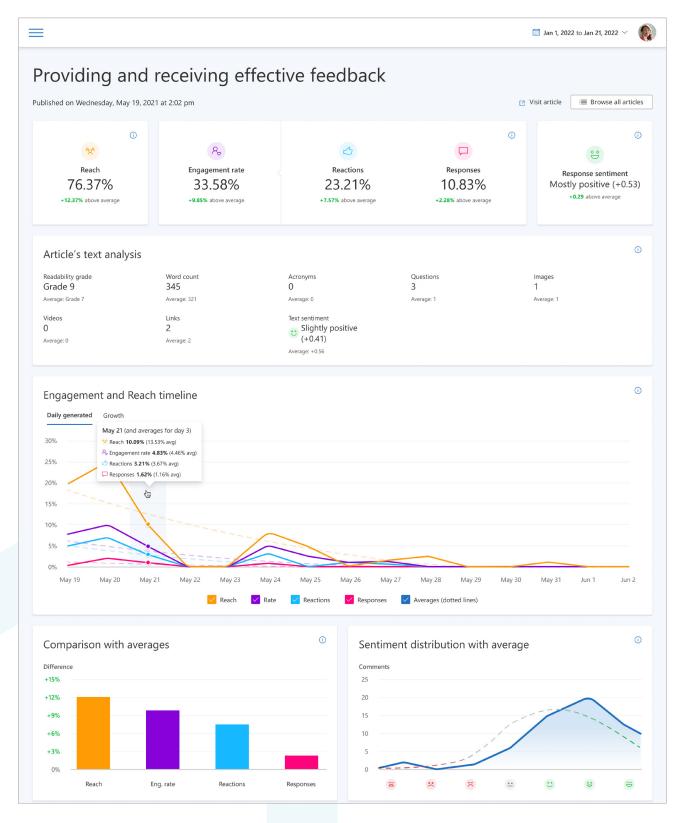
GO Intranet also includes an additional module for content engagement analytics. These reports focus exclusively on news articles and will be of interest to internal communicators. The screenshot below shows the overview page which includes engagement trends across all news articles, as well as a list of top articles by reach. Concepts such as reach, engagement rate and response sentiment are explained in useful tooltips.



The content analytics dashboard provides intranet-wide engagement numbers and a list of top articles by reach.



Communicators can also drill down into the details of a particular article and see an in-depth analysis. This includes a timeline of engagement with the article, a text analysis of the article and a sentiment analysis of the responses.



Rich information on individual articles is available and includes an engagement timeline and sentiment analysis.

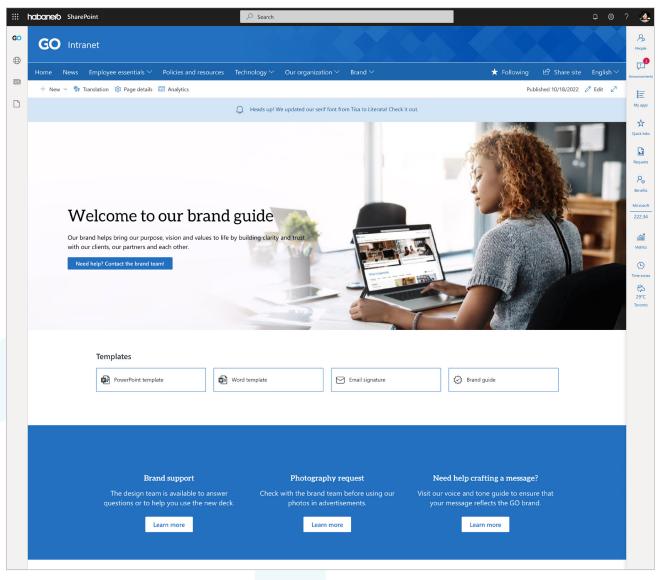


#### **GO Brandmate**

'GO Brandmate' is a module that's designed to address the needs of corporate communications and brand teams. It helps them to bring the corporate brand alive and ensure that employees across the organisation have access to company-approved visuals when they create a PowerPoint presentation.

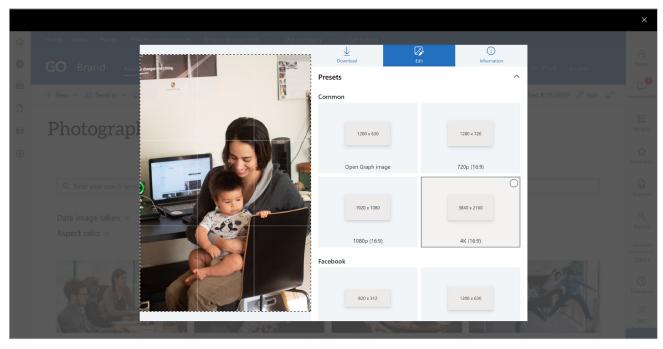
The first part of the solution is the brand guide, which is an area on the intranet that groups all branding information together in an easily digestible way. It includes the latest corporate templates, an overview of the corporate logos, colour schemes and fonts, as well as approved assets for icons and photography.

We especially like the built-in features for managing photos, which are intuitive and easy to use by any employee. Photos can be searched and filtered based on various metadata and can also be edited on the spot before downloading. An intuitive cropping tool is available, and predefined sizes for use on popular social media platforms are included.



The brand guide is a section on the intranet that brings all branding elements together.

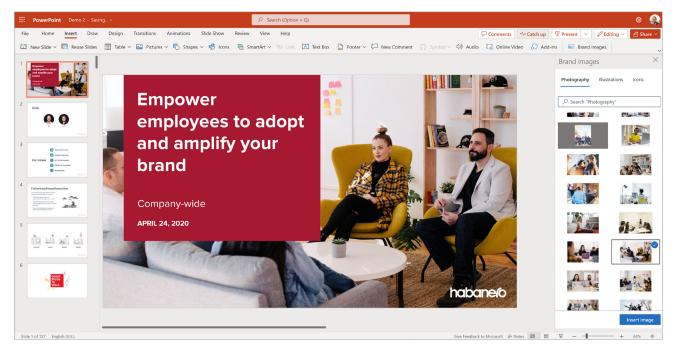




An intuitive tool allows users to crop images to size or to select from a list of predefined sizes for use on social media.



The integration between the brand guide and PowerPoint, via a plug-in, is also powerful. End users don't have to leave PowerPoint and go into the brand guide; they have access to the libraries of the brand guide directly from an integrated right-hand side panel. From here, they can insert approved photography, icons, and other visuals directly into their presentation.



Users have direct access to the libraries of the brand guide and can insert corporate-approved visuals via a PowerPoint plug-in.



# THINGS TO BEAR IN MIND

GO Intranet is a modern-looking, easy to use product that stays close to SharePoint and leverages other products in the Microsoft 365 ecosystem such as Teams and Yammer. The product addresses some of the gaps in Microsoft's intranet offering, for instance in the area of analytics, where a rich set of dashboards are available. Some of these require Google Analytics and Google Tag Manager and will not be available to organisations that prefer not to use Google products.

In some areas we still see room for improvement. As an example, the top-level navigation and the branding of the product rely on the standard SharePoint features, while other products in this report have extended the basic capabilities or replaced them with their own. Given the high price point, especially for smaller organisations up to 1,000 users, we would like to see more gaps addressed.

In the area of integration with third-party enterprise systems, the product's out-of-the-box offering is limited. More can be achieved by using third-party solutions such as connectors in Power Platform, but these will come with an additional cost and effort.

Mobile users are served through the Teams app and the responsive site. The lack of a dedicated mobile app will be an issue for some organisations, but GO Intranet addresses this concern at least partially by making the full intranet available as an app in MS Teams, by supporting Viva Connections, and by bringing news content into the Teams app. This works fine but assumes that clients have the Teams app widely deployed, which is not always the case.

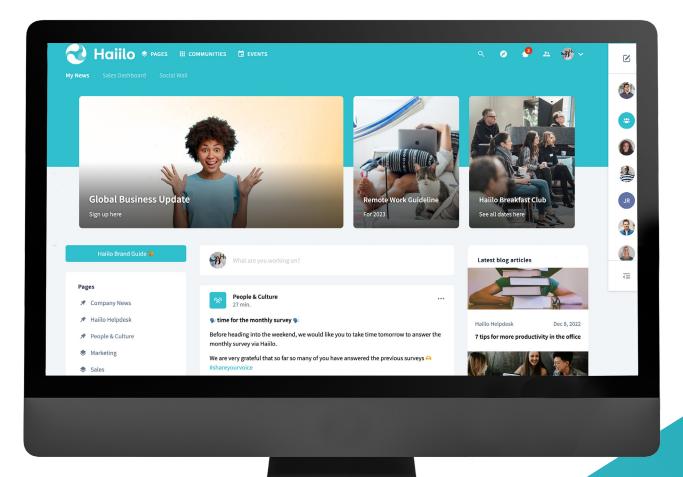
Also worth pointing out is that Habanero have offices across Canada but no physical presence, neither directly nor through partners, in other parts of the world.

# Why choose this product

GO Intranet will be of interest to organisations that have invested heavily in Microsoft 365 and use its various applications extensively, especially Teams and Yammer. GO Intranet fills a number of gaps in the current Microsoft offering, while at the same time staying very close to the standard functionality. Corporate and internal communicators will certainly be impressed by the rich analytics around communication campaigns and the corporate brand portal functionality. Organisations that have the internal resources to follow Microsoft's offering and roadmap closely, and want to stay fully aligned, will benefit most from a product like GO Intranet.







# Our view in one tweet

Haiilo from @haiilo\_company is a delightfully simple-to-use social intranet that encourages employee participation.



# Haiilo owned by Haiilo

Haiilo, owned by Germany-based Haiilo, was released in 2012 as a social intranet product (under the name COYO), and this focus on communication, engagement and collaboration has continued through to today. Haiilo is very straightforward to use for employees and admins alike. It has simple content creation capabilities that produce nice looking pages and encourage participation and engagement. Social features are particularly good, with plenty of opportunities to build a community feel through the platform. An optional module helps to promote and encourage employee advocacy via the intranet.

The product feature set is focused on communication, collaboration and engagement; broader digital workplace capabilities are not as strong as other offerings. Integrations with third-party systems and Microsoft 365 are fairly limited, but improving thanks to an integrations marketplace.

There are gaps in some of the published content features as well. Targeting is not as flexible as some complex organisations might need and the content life cycle management features planned for 2023 will certainly be a welcome addition.

Overall, Haiilo is an attractive product that could appeal to a wide range of organisations; Haiilo currently has some very large customers with hundreds of thousands of employees, so it certainly scales. We think it will be a good match for organisations that are looking to encourage employee contributions and participation with a focus on informal and engaging content. It is one of the lower-priced offerings in this report too, despite the price including some optional extras that not all organisations will need. Finally, it's worth mentioning that Haiilo's voice of the customer feedback was overwhelmingly positive, with customers echoing many of the sentiments expressed above.

# Summary table of scenario scores

# NO. SCENARIO/SCORE User experience and visual appeal 1 Mobile and frontline support 2 Internal communication 3 Community and engagement 4 5 Information finding and knowledge management 6 Admin experience and governance **Analytics** 7 8 Digital workplace integrations Microsoft 365 integration 10 Wildcard

# **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and nonprofit organisations, frontline users, multiyear commitments, businesses over 20,000 users.

Price includes: Training for admins, customer success services, maintenance, product support, editor manuals, updates and upgrades, choice of modules / add-ons, Microsoft 365 set-up, hosting, onboarding user data, access to a community & webinars

# Key benefits

- The overall user experience of Haiilo is excellent it's easy to use, but without impacting on functionality.
- News and content creation is simple, flexible, and effective, with advanced features that make use of a variety of engaging widgets and content layouts.
- Collaboration and social tools are very strong and are really the beating heart of the product.
- · Search works well, with useful filters and the option to include content from outside of Haiilo.

# Improvements and considerations

- Audience targeting for published content relies on subscription to pages and it's not possible to create dynamic audiences for targeting.
- Content owners will miss the ability to easily keep track of their content and when it is due for review – there is no automated content life cycle management.
- There are few integrations with business services or Microsoft 365 applications, but what is there is done well.
- Although the paid-for Haiilo Analytics module adds in more detail that intranet managers and publishers will appreciate, the analytics are still guite basic and one-size-fits-all.
- Haiilo is one of the lower priced offerings, even with paid-for optional extras included, so the
  product could work out cheaper for organisations that don't need everything we've included here.



# **Product type**



# **Branding opportunities**

All branding, complex options

SharePoint

# Target businesses



**SMALL** less than 1,000 people



**MEDIUM** 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

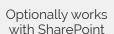
# Base systems



standalone









Other

# **Sectors**



Healthcare



**Energy and utilities** 



Public services, government and administration



Retail



Business, consulting and management

# You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



Company Haiilo



Company founded

2010



Company locations

Hamburg, Germany (HQ), USA, UK, Finland, France



ISO 27001 certified

Yes



Typical client size

1,000 to over 15,000 employees



Largest deployment so far

300,000 employees across 130 countries



#### Partner locations

Germany, Austria, Switzerland, France, Japan, USA, UK, Nordics



#### Customers

Clients include: Deutsche Telekom, Deutsche Bahn, Asklepios, E.ON, uniper, comdirect, CHRIST, Vorwerk, please see their website for details.

# Product and technical details

Name of product

Product launched

2012 (as COYO)

Current version

45

Accessibility

WCAG 2.1 compliant



#### Deployment

Client onpremises Client private cloud Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant Other\*

#### Data residency

Germany

#### Client data encrypted

In transit only

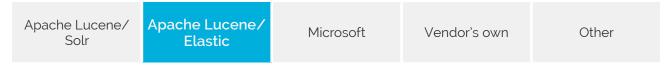
In transit and at rest

At rest only

#### **Authentication supported**

Azure Active Directory	ADFS	Open ID	Oauth	G Suite	Other
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#### Search technology



#### Document library sources integrated

Box Dropbox Google Drive SharePoint OneDrive Other	Вох	Dropbox	Google Drive	SharePoint	OneDrive	Other
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### SharePoint/0365 versions supported (if applicable)

SP Server 2016	SP Server 2019	SP Server Subscription Edition	SP Online	Viva Connections
Mobile app dep	loyment			
Google Play store	Apple store	MDM	МАМ	Other



<sup>\*</sup>T-Systems Sovereign Cloud & Google Cloud Platform

#### Reverse-out options

For cloud customers, Haiilo can provide their data as an export at the end of the term if they wish. If they do not want to export their data, Haiilo will completely delete their instance with all data after 30 days.

#### Languages supported

Albanian, Chinese, Croatian, Czech, Danish, Dutch, English, Finnish, French, German, Greek, Hungarian, Italian, Japanese, Korean, Macedonian, Norwegian, Polish, Portuguese, Romanian, Russian, Serbian (Cyrillic), Slovak, Spanish (Spain), Swedish, Thai

#### Machine translation

Yes - via the product

#### Right to left script

No

# Set-up and support

#### Set-up process for new clients

Deployment of the out-of-the-box product in client's instances within hours; user sync together with the client and / or partner; standard configuration set-up within a few weeks (design, information architecture, rights and roles, contents); further individualisation depends on integrations / plug-ins and company size.

#### Product updates

Continuous deployment

#### Product update process

Haiilo Cloud: automatically, all customers updated at once.

Private Cloud: customer decides timing, customer can opt out.

#### Technical support

Support depends on the SLA packages, partners provide additional support in geographic regions DACH, EMEA, and US.

#### **User community**

Haiilo Summit (event for customers in the Haiilo office), Haiilo Campus (online knowledge base), Digital Hours (webinars for news and new products), Customer Community in a Haiilo environment including Roadmap Ideation.



#### In their own words

Haiilo says: "Haiilo is an easy-to-use Social Intranet for greater involvement and engagement where everyone in your company comes together and feels at home. It offers a desktop and app version to make sure everyone in the company gets access. The focus of Haiilo is to build a digital place where official communication takes place, company culture can be strengthened and communities can grow."

# Their view of the marketplace

Haiilo says: "Haiilo offers a company-wide digital home, also in distancing times. Colleague lists, user profiles, communities and the messenger make connecting with peers easier than ever. With access through all devices, every employee can actively be part of communities, and discussions, and regardless of time and place access to the most relevant information, wikis, and documents."

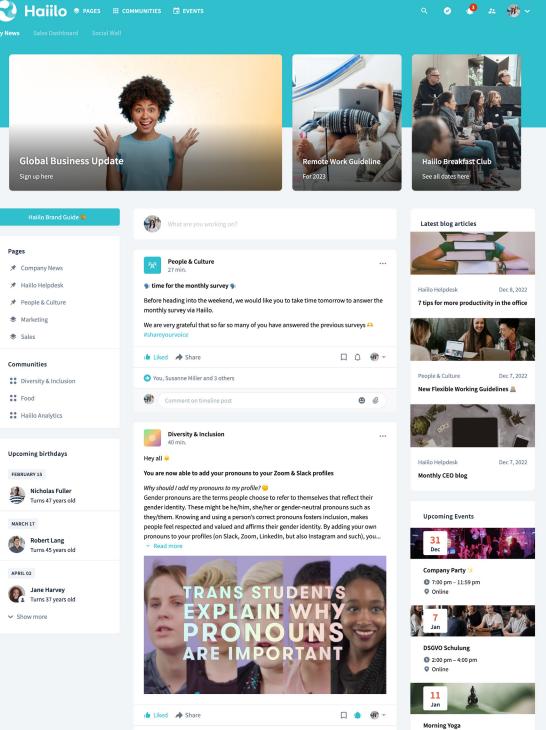
#### Voice of the customer

Customers were highly complimentary about Haiilo, with most citing the best aspects of the product being its ease of use and the close links between publishing and social features. One customer said there is a "high level of user-friendliness and intuitive operation". Another explained, "the easy administration of the platform is a big plus" adding it can also, "be used intuitively by our employees and enables them to work more independently". Another enthused that Haiilo is, "absolutely outstanding in terms of user-friendliness and intuitiveness of the system". Customers also value the social and engaging nature of the platform with one advising that, "team spirit is strengthened, the flow of information is tangible for everyone". Others simply stated that for them the best thing about the product is, "the mixture of classic intranet and a socializing platform". Or "the connection between social media and intranet".

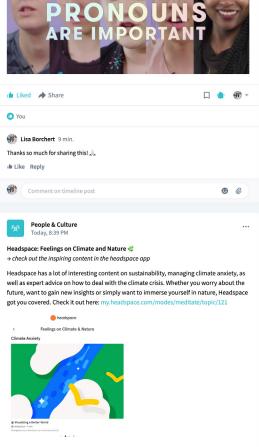
Changes customers would like to see were themed around search, image handling and the mobile app. Improved search is a typical comment for intranet products and customers did not expand upon where they saw shortcomings. For image handling they were more specific, with one requesting the ability to, "upload multiple images at once and edit the size of the images within the [desktop publishing] app itself". Another was a little confused that news images "have to be uploaded multiple times in different croppings (e.g. square and horizontal teaser image)" adding that they felt this was, "likely to quickly lead to chaos without a thumbnail view in the file library". For the app, customers would like to see further development and stability improvements at the same time, with one advising, "the app doesn't always run smoothly". For app development, one customer asked for a "teaser widget in the app's timeline", while another simply stated, "keep improving the mobile app".

Customers were unanimous in their praise for Haiilo as a vendor with typical responses being "very good", "very positive" and "absolutely great", with some saying they were, "very satisfied". In particular, customers appreciate the speed of response with one explaining, "if you have any questions, you will be helped quickly". Another, recently onboarded customer, said they were "extremely impressed by the very personal and fast support from our sales manager". One otherwise happy customer cautioned, "a phone number for support would be nice". While another one enthused, "the support before, during and after the introduction was great", adding that, "Haiilo colleagues can be reached at any time and quickly come up with the right solutions".





₹



7:00 am – 8:00 am

# **REVIEW**

# 1. User experience and visual appeal

score 4+ Haiilo has a pleasant, uncluttered user experience similar to consumerorientated social media sites, which reduces the time to feel comfortable using it. Nonetheless there is a helpful guided tour of features that begins automatically when an employee first uses the site. Home page content can be targeted at the item level such as individual news articles. The home page includes a timeline of news and activity alongside other client configurable

widgets, such as company events, useful pages or latest wiki articles. Multiple home pages can coexist and be targeted to groups of users. This means someone in sales could have a suite of 'home pages' available to them: one that is news-focused, another is a dashboard of sales information, while a third is focused on social community activity. This approach is a little unusual but we like the way it has been implemented.

Haiilo doesn't use a mega menu or tree-structure for navigation as standard, instead it offers 'Pages', 'Communities', and 'Events'; these labels are client-configurable. 'Pages' are really subsites for news and reference information, while Communities are for social and collaboration activities. Employees are automatically granted access or can request access to sites within these spaces, if it is restricted. When visiting Pages or Communities, employees see tiles of available spaces that they can browse, filter, and search to find what they need. It's easy for someone to see which spaces they have access to or are subscribed to and they can 'favourite' Communities so they appear at the top of the list.

Notifications are displayed via the 'bell' icon, and we liked that they are split into two categories. 'Discussions' highlight when you have been @mentioned or received a comment on content you're responsible for; 'Activity' is where pages or people you're following have something new. Notifications can be marked as read but remain in the menu for future reference.

Branding is managed via client configurable themes that control colours, logos and widget styling. Multiple themes are supported and include audience targeting so multi-brand organisations are well catered for.

#### 2. Mobile and frontline support



Mobile support in Haiilo is good, with features that are particularly useful on small devices, although several customers said they would welcome further development. The product is mobile responsive but most customers take advantage of the native mobile app, which is available via public app stores or for distribution via the client's MDM. Haiilo says most clients go with the MDM option as this allows them to custom brand the app (at extra cost) as well.

Employees log-in with their company SSO credentials such as Active Directory, Google



Workspace or Okta. Haiilo also supports native authentication for frontline workers who don't have company credentials. They are enrolled via a QR code or link and supply a personal email or mobile number as a unique identifier. Biometric authentication is not supported but clients have control over whether employees are automatically logged out when closing the app. We liked that when accessing the app, admins can choose to show some form of agreement (such as a privacy policy) that users must approve before gaining entry.

The social nature of Haiilo translates well to an app, particularly the newsfeed timeline on the home page. Admins have the choice of adapting a desktop home page for mobile by disabling some widgets to optimise the experience, or creating dedicated home pages for mobile users. In either case, navigation and interaction methods that are familiar from consumer-oriented apps makes it easy to get around and find what you're after. Search is nicely implemented on mobile, too and we like that the functionality is not a cut-down version of the desktop, as is the case with some other apps. Alongside search, the bottom navigation bar has icons for home, chat, people directory and a 'more' hamburger that goes to pages, communities and settings.

Some features are particularly welcome on mobile although none are specifically designed for frontline workers. Chat works across desktop and mobile and includes voice messaging from the app, making it a viable alternative to WhatsApp. The employee directory experience is also nicely optimised, making it easy to find and contact colleagues when away from the desk. Finally, there is a simple way to post updates to the timeline including pictures, video and files.

#### 3. Internal communication

3.5+

Internal communication is handled well within Haiilo, with the product offering several options to meet different communication scenarios. Timeline posts are a quick way to add an update or announcement within a community or news area. Formatting and layout are limited but attachments for documents or images are available along with emojis. Everyone following or subscribed to the person, community or page will see the post in their timeline and notifications. There is

the option to 'pin' the post to the top of the timeline for up to 30 days but once people have seen it, they can dismiss it.

Longer form news articles are created using the 'Blog' tool within 'Pages'. Audience targeting of news and reference content is managed through subscription to Pages, which is less flexible than some other approaches that match content with employee profile metadata. Templating isn't available yet (blog articles can be duplicated to provide a basic form of template), but article creation is simple and effective. An 'advanced mode' within the content creator expands the available options, so that editors can drop in widgets and change article layouts. Care would need to be taken that use of the rich text editor does not introduce too many styles. Future publish dates are supported and a simple approval workflow mechanism is in place whereby an 'Author' role can create a draft but only 'Publishers' can publish the article.

A document library app can be added to Pages to show PDF, Word, etc for reference content. These can be previewed and read in full without a user having to download them on the desktop but app users have to download, which is a pity. Alternatively, a 'Content' app enables publishers to create a page of information built using Haiilo widgets, displaying it on-screen and accessed directly from the menu.

Urgent communication is presented in a couple of ways. Notifications are available to be sent via the desktop site, email, and pushed to the app for individual articles too. Alternatively, admins can add a prominent banner on the home page with text or links to a dedicated article, which would remain until manually removed.



Cross-channel communication from Haiilo is fairly limited in the standard product. Employees get an email digest of activity from the platform every week as standard and have options to change the frequency, including opting out altogether. It's possible to build a dedicated home page and have an associated 'digital signage' user for screens but this is not a core strength of the product. An optional employee advocacy module supports sharing stories to external social platforms at additional cost. Please see Scenario 10 and the Highlights for further details.

# 4. Community and engagement

SCORE /

Community and engagement features are core to Haiilo and a prominent part of the experience, with the main timeline view encouraging engagement and interaction from the start.

Like Pages, Communities are a 'container' for different content types including events, tasks lists, wikis and document stores, making them quite flexible and lending them to a range of use cases. At the heart is the timeline

where anyone can start a thread and reply, like, share, @mention etc. Attaching files in the timeline is also supported. Communities can be set up by anyone but some organisations use a simple form to implement a request process. As part of the setup, the community is set as public, protected (request to join) or private (only visible to members). Reporting of inappropriate content and comments is supported along with retrospective moderation. One particularly useful feature of communities is that external users can be invited, facilitating collaboration outside the organisation.

Published content has a similarly social approach with news or blog articles allowing comments and likes by default, although this can be disabled. Pages can include a range of social and interactive widgets such as a simple poll, forms, a display of new colleagues, upcoming birthdays, and 'do you know?' which displays members at random and links through to their profile pages. These are nice features for encouraging people to get to know each other, especially where colleagues are not together physically. There are no other specific employee wellbeing features at the moment.

#### 5. Information finding and knowledge management

score 3

Search in Haiilo is accessed via a persistent search that is part of the top menu bar. Results appear in a drop-down and refine as you type, highlighting the matched terms in the result and showing what type of content the result is, such as a page, event, or person. Hitting enter brings up the search centre where results are grouped by content type and there are filters to refine results by content type, date, and Page / Community. Results from Google

Drive and OneDrive / SharePoint are included if these tools are connected. Results are presented well, with abstracts for native content and thumbnail images along with published dates.

Fuzzy matching is included to help with mis-spellings but there is no support for synonyms, stemming or promoted results, which is a pity. There is a simple search feedback mechanism



but the results are not collated in analytics.

People search and employee profiles are well featured. People are included in the global search results with all profile information indexed, and the employee directory is accessed via a people icon in the top menu bar. Filters enable results to be refined by organisational information such as department or whether a person is part of your network. People results are presented as attractive cards or tiles that show pictures and profile information. This view also allows you to make contact via the built-in chat capability or follow and add people to your network. Clicking on a card shows the full profile information and their activity from blog or timeline posts. There is also a simple org chart showing the person's manager and team members.

Haiilo supports knowledge finding via Pages and Communities where easy-to-use wikis can be added as a content type. Content pages support hashtags and these can be aggregated from across the intranet via search, or within a widget.

### 6. Admin experience and governance

SCORE 3.5

Haiilo has a powerful yet easy-to-use suite of administration tools. There is a clearly labelled menu to navigate through and options are grouped logically, using tabs to expand on the tasks within areas such as user management, security and features.

There is a high level of granularity around user roles and permissions with very detailed control over which features and capabilities each role can access.

An 'administrator' and a 'user' role are set up by default and configured to client needs, but then other roles can be created as desired by admins or pre-configured by Haiilo. It would be nice to see some workflows for changes to the site, such as the creation of a new site ('Page' in Haiilo) or community, but Haiilo says customers create simple forms for this purpose.

Home page administration is similarly powerful and easy to use. We really like that home pages can be targeted to groups of users and that these groups can have a 'set' of home pages defined for them that provide different overviews of what's going on. For example, a sales team could have a set of home pages that include the typical news and timeline view alongside a sales dashboard. Configuring home page layouts, components and audiences is very straightforward via a drag and drop edit mode that allows admins to add, remove and reorganise widgets.

Content lifecycle management features are sadly lacking in Haiilo at the moment although they are working on this for 2023. Currently there is no review or expiry for published content nor an easy way for content owners to get an overview of what they are responsible for within the CMS (this can be seen via the optional analytics module). Out-of-date content can be reported to the owner but we would like to see more robust provision in this area. However, we do like that publishers can replace files from within search results without having to navigate to where it 'lives'.

Multi-language support is an optional extra but included in our price comparison. Support in this area is good with client-configurable translation for the CMS / Admin interface along with content. Published content is machine translated into additional languages using Azure Cognitive Services or Deepl for editors to check before publishing. Haiilo then uses the language preferences in the employee's profile to show content in their preferred language if available. Where the original language version is amended, the translator will receive a notification. On-the-fly machine translation is also available for content that has not been translated, which includes comments, again using Azure or Deepl.



# 7. Analytics

# score 2.5

Analytics is an optional extra in Haiilo but included in our price comparison. The suite provides site overview and detailed content engagement information that admins and content owners will find useful, if a little basic. Analytics is accessible to all roles with administration privileges for either the site, Pages or Communities. There is a standard suite of dashboards and reports, some of which have filtering options. All reports can be exported to

Excel but admins cannot build their own reports, which is a pity.

A global dashboard view shows overall metrics such as adoption rate, how many licenses are being used, how many unique users there are and how many pages and communities there are. Overall traffic can be viewed over time as well and there is a useful breakdown of passive users versus those who have created or engaged with content in some way. Another useful overview at this level is a user activity map that shows the peak traffic times across the days of the week, which can help with scheduling content.

At a more detailed level, the dashboard shows top performing articles by different content types with number of views, likes and shares, and a calculated engagement rate. Filters for date range, company, location, and department enable admins to find the data they need. Clicking on one of the top performing articles shows the data over time via a graph. Pages and Communities have similar overviews and details. Where multiple home pages are in use, basic traffic information is available as well.

The closest thing Haiilo has to mandatory reads is a 'terms of use' pop-up that people have to acknowledge before they can use the site but who has done this is not tracked. Search reporting is rudimentary, too. Top search terms and phrases are shown but there's no more detail unfortunately.

# 8. Digital workplace integrations

1.5+

Haiilo has a relatively new marketplace for third-party 'plug-in' widgets. These enable information from external services to be shown alongside other Haiilo content. There are a mix of free and paid for plug-ins. Currently the range available is fairly limited but there are free plugins for Facebook and Twitter and a podcasting plug-in called Hypecast. Other paid-for plugins provide support for ideation, polls and quizzes and there is one for the shift planning

tool, Staffomatic. The experience across these plug-ins varies with some looking entirely native while others look more like an embedded iframe. Haiilo has an open, well-documented, API so clients are able to develop integrations themselves or via a partner.

The 'launchpad' in the top menu shows admin configured, targeted links to key company tools (and Microsoft 365 apps if connected – see scenario 9). This means that a tool that's only applicable for ten users isn't applied across a ten thousand user intranet. We like that employees can also add their own choices to 'your links' within this feature. One slightly disorientating aspect of the launchpad is that it is a full screen overlay that substitutes intranet branding for a plain white background, but it's a minor complaint.



Non-Microsoft communication and collaboration tool integration is limited, although see Scenario 3 for details about the optional advocacy module. Haiilo has an optional integration with Google Workspace which is included in our price comparison information. This enables documents to be attached to content directly from Google Drive and for search to display Google Workspace results alongside native content in search. However, it does not include the ability to surface Google Drive document repositories. There is no integration with Slack.

# 9. Microsoft 365 integration

SCORE 2.5

Microsoft 365 integration is another optional extra that is included in our price comparison. This option provides several integrations with SharePoint, Viva Connections, Teams and search but not Yammer.

SharePoint documents can be attached to posts as a file or a link. SharePoint documents are also included in search results although only the document title is shown in the result listing; there is no metadata,

summary, or thumbnail. Clicking the result opens it in the relevant Office App. There is a 'see all' option in the result listing which then runs the search in SharePoint. It's not possible to show a whole SharePoint document library in Haiilo but we do like the widget that shows employees a personalised listing of their recent documents. Admins configure how many documents to show and the widget resizes based on the content.

Haiilo's employee profile page includes the ability to initiate a Teams chat or audio / video call. There is an app for Teams that displays the employee's personalised home page content. They can interact with posts and post new updates to the timeline from here. Clicking on an article opens it in the intranet itself, rather than within Teams. Finally, Haiilo can be configured to send a Teams chat message to employees every time a new blog is posted to one of their subscribed Pages or Communities.

Haiilo has used Microsoft's Adaptive Cards framework to enable unread Haiilo notifications to be shown in SharePoint communication sites and Viva Connections. As with the Teams app, clicking on the link takes you to the intranet to view the related content. We particularly like the 'latest M365 files' widget that can be added to Haiilo Home. This shows a small number of documents the user had last accessed and could be positioned somewhere more accessible than having to navigate to Delve. A 'launch pad' widget can also be added, which replicates the M365 waffle menu within Haiilo Home for quick-launching applications. We like that the Outlook launcher shows a blue dot when new mail has been received. Events can integrate into an Outlook calendar, and Stream videos can be embedded in content (such as a timeline post).



#### 10. Wildcard



Haiilo's wildcard scenario is an integration with Haiilo's employee advocacy module, which is an optional extra component at additional cost. We weren't shown the full functionality of the module, so it is not part of this review, instead we have reviewed how content from the employee advocacy module can be accessed via the main intranet. The plug-in integration enables organisations to pull sharable content from the advocacy module into the

context of the Haiilo intranet so that employees can share it with their external networks via LinkedIn, Facebook etc.

The employee advocacy widget can be added to Haiilo's home page or a specific Community for employee advocacy, depending on how this activity is managed in the client organisation. When set up, the widget shows shareable content employees have access to in a newsfeed format, along with icons for each one of the configured social networks. Sharing the content is then a simple matter of clicking the relevant icon which brings up a box with some suggested text to promote the article. This is easy for employees to do from both the desktop and mobile app. There is a gamification option so shares can earn the employee points. Please see the Highlights section for more on how this works.

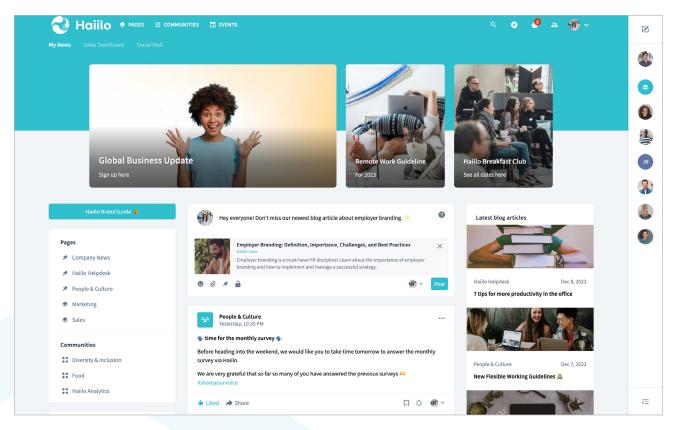
Overall, for organisations with a formal employee advocacy programme, we can see the benefit of promoting shareable content to your most engaged employees. Unlike many aspects of intranet content, the ROI of employee advocacy can be measured by comparing these posts with the cost per click for paid for advertising on the different social networks.



# **PRODUCT HIGHLIGHTS**

# **News posting**

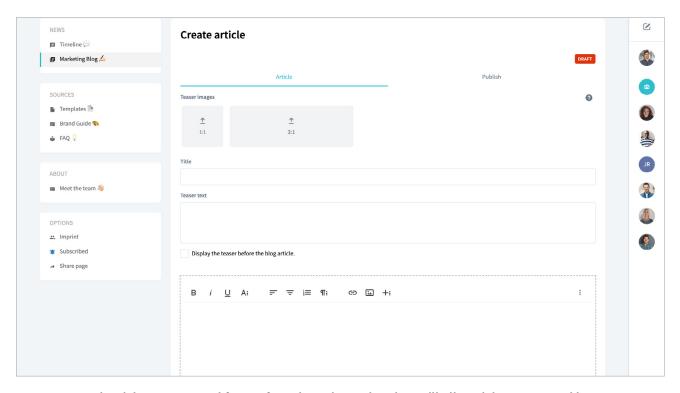
Internal communications is well supported in Haiilo and will particularly suit organisations that want to encourage engagement and contributions from the wider employee community. The timeline is a central feature of the product and from here employees can post quick updates about their work or team. These short updates still support file and image attachments along with emoji. Everyone who is following that employee will see the update in their timeline and engage with the post with the usual likes, comments, and shares. Communications people can also use this facility to post on behalf of a 'Global News' page for example and, in this case, everyone who is subscribed to the Page will see the update. Posts can also be 'pinned' to the top of the timeline for up to 30 days to increase their visibility.



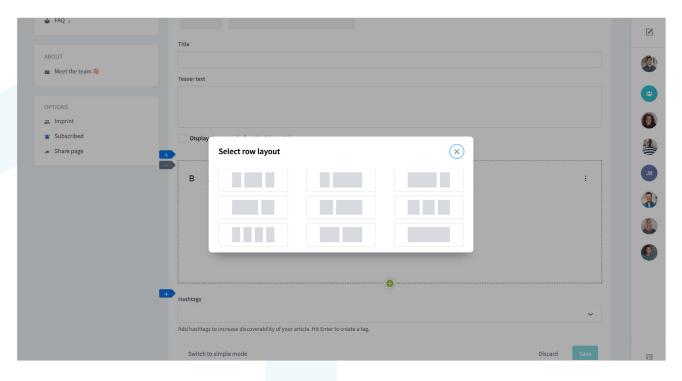
The timeline is used for quick updates from individual employees and communications teams.



More formal news articles are created using a 'blog' content type, again indicating the product's leaning towards encouraging engagement. This content type uses a form-based template for information such as title, introduction, and images, with a rich text editor for the main text body. The rich text editor allows the creation of tables, quotes, lists and control over font sizes. It supports more complex layouts if needed with editors able to add new sections with multiple columns.



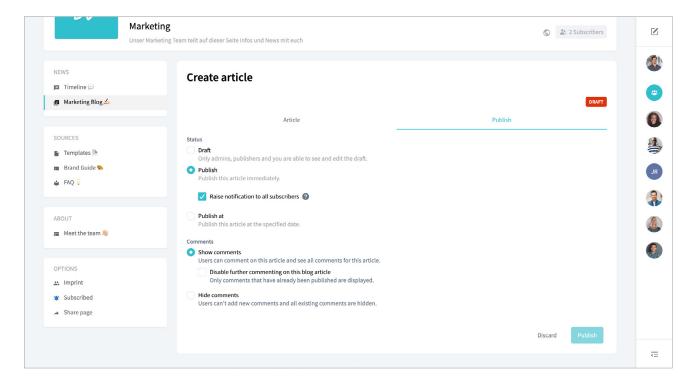
Formal articles are created from a form-based template but still allow rich content and layouts.



The editor allows the selection of a range of column-based layouts for content sections.



Once the copy has been created, the editor then chooses from a range of publishing options. The article can be published immediately or later. There are also options to send notifications via the desktop and mobile app for important communications. Finally, there are options to allow or disallow commenting on the article. Overall, the process is very straightforward and, as the customer feedback attests, requires very little training for people to be able to contribute content.



Editors choose from a range of options about how their content will be published and promoted.



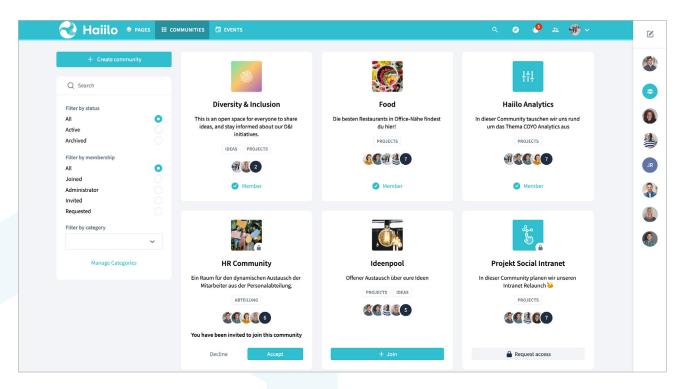
#### **Communities**

Communities are the social heart of Haiilo and are a flexible way to support a variety of use cases, such as team collaboration, communities of practice, and knowledge sharing. By default, anyone is able to create a community but there is the option to restrict this to particular roles and some companies have used a request form to control creation. Communities have the option to be public, protected (request to join) or private (invite only and hidden).

One particularly useful feature is the ability to add external users to a Community to facilitate collaboration with partners, suppliers, and customers. External users only have access to that community and the information shared within it; they do not have access to the wider intranet.

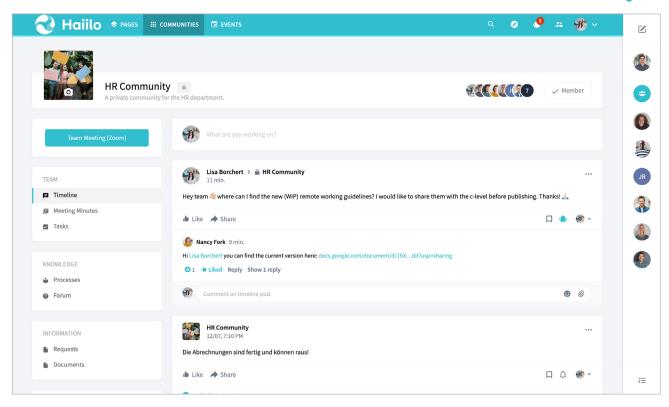
In most cases, the timeline will be the main activity in the Community and, as with the main site, posts here support the usual addition of files and images along with reactions and comments from other community members. These posts will also be shown in the home page timeline for members of the Community as well.

Part of what makes Communities so adaptable to different use cases is the variety of content type 'Apps' that can be added to them. Optional Apps include discussion forums, blogs, events, task lists, document stores, wikis, and forms. For example, task lists are a central way of coordinating and allocating tasks to Community team members. We like the flexible options for using these. They can be used for one or multiple projects, and they can be configured so that anyone or only admins can manage task items and lists. When a task is created it can be assigned to colleagues and have due dates set, with the assigned colleague getting a notification.

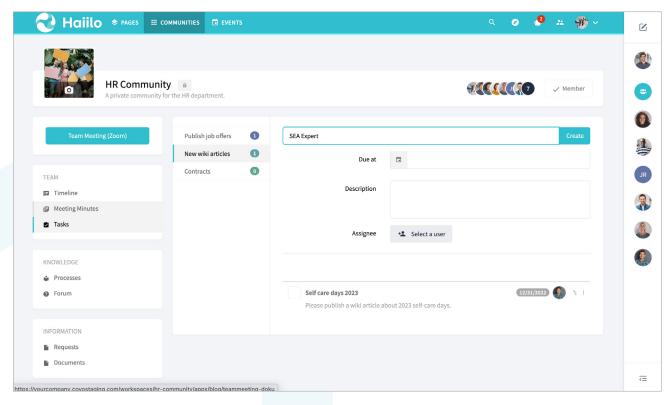


The Communities home page shows groups that an employee has access to or can request to join.





Posts to the community will also show up in the home page timeline for community members.

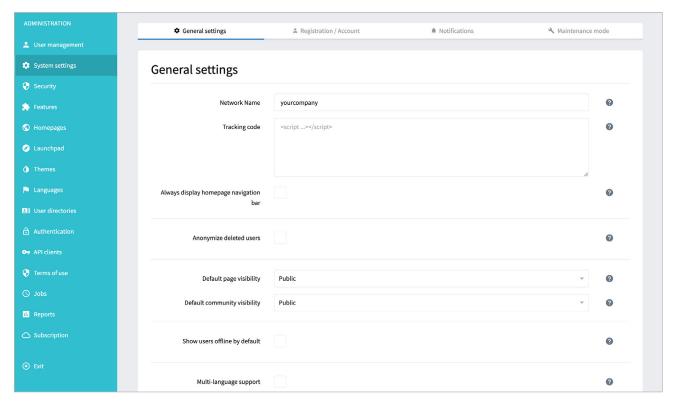


Community task lists are a way of managing shared tasks and due dates within a team.



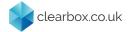
# Simple administration tools

Haiilo says that it aims to make the intranet easy to administer and for customers to be as self-sufficient as possible. The easy-to use and intuitive administration interface seems to fit the bill, if customer feedback is anything to go by. Administration options are accessed via a dedicated interface that lays the various options out clearly and groups together related features logically, using tabs. Company admins have control over every aspect of the product from user management and roles through to branding. Most settings have a tool tip that explains more about what it does and links through to a page of further information if needed.

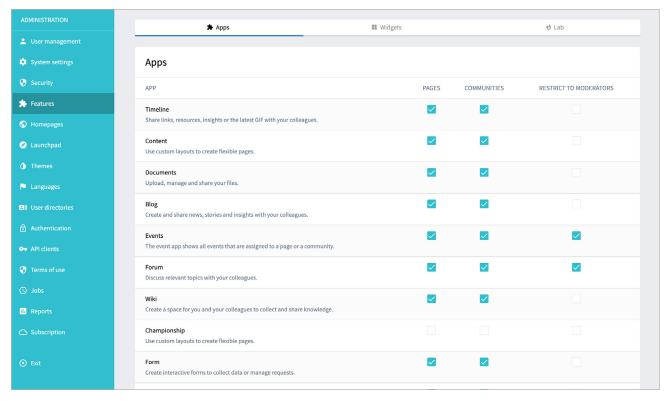


Haiilo's administration interface is laid out clearly and logically.

Tooltips (the ? icon) help explain options in more detail.



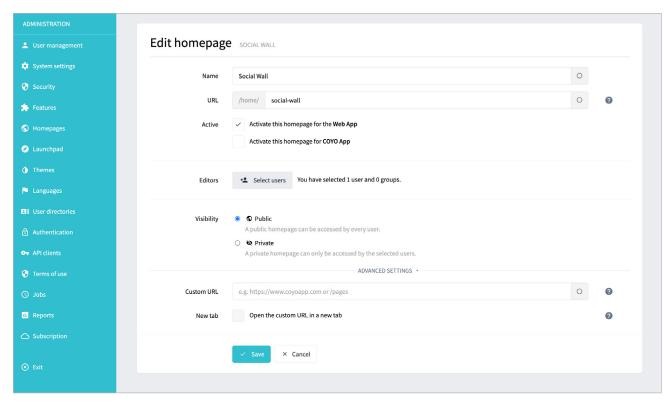
There is a very fine level of granularity of control over many aspects of the product. Multiple user roles are definable and every aspect of what they can and can't do within the platform is controllable via simple check boxes. The global admin also has controls to define what content types (Apps) are available in what parts of the intranet and whether their use is restricted to admins for that part of the site. There is an increasing trend for intranet product vendors to put this type of control in the hands of non-technical roles which we think is a good thing, and Haiilo has done this very well.



Content types can be enabled, disabled and restricted within different parts of the intranet.



One of Haiilo's more unusual features is the ability to define multiple targeted home pages that can show entirely different content to different groups of employees. Within this there is the further ability to create sets of home pages for these employees as well. For example, a sales team might have a set of home pages that shows a sales dashboard as well as a typical news and timeline view. Haiilo demonstrated a set for senior managers that showed a dashboard of company KPIs alongside one for news. These can be used to produce different sets for business units or countries as needed.



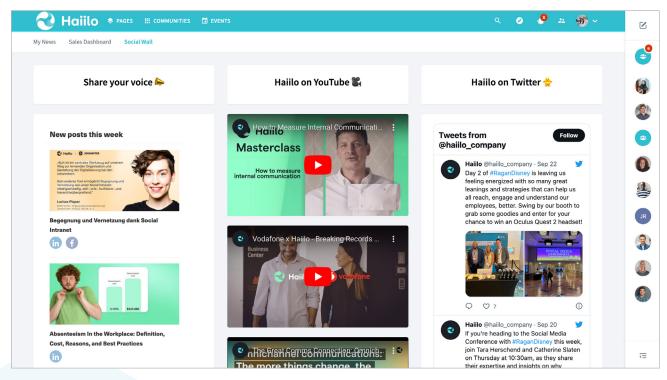
Different home pages and home page sets can be created for different groups of users.



# **Employee advocacy**

An increasing number of intranet products are introducing employee advocacy features into their offerings. Haiilo has something of an advantage, thanks to its advocacy module (formerly Smarp). For clients that have the advocacy module, Haiilo now has a dedicated optional extra plug-in that pulls shareable content into the intranet. This nicely combines the employee engagement aspects of the intranet (bringing people together, informing and providing document access, sharing best practice etc.) with the ability to share approved content outside the intranet.

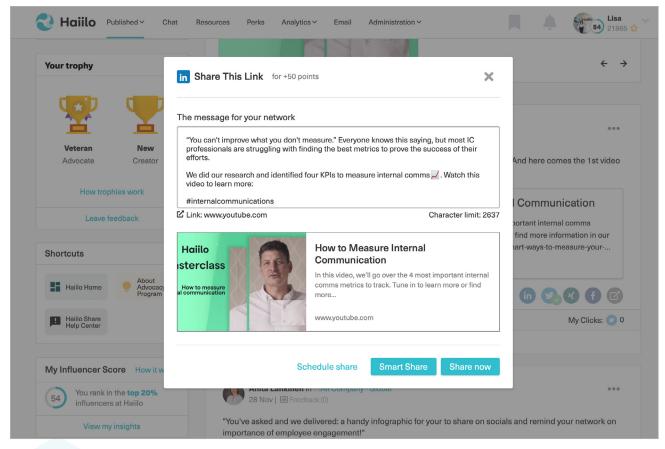
The plug-in widget can be used anywhere within Haiilo; such as part of a 'social wall' page within the site (see example below) or it can be used within a Community for employee ambassadors who come together to make shareable content. This means it is adaptable to the employee advocacy model used within the organisation.



The employee advocacy widget (left column) in use as part of a social wall.



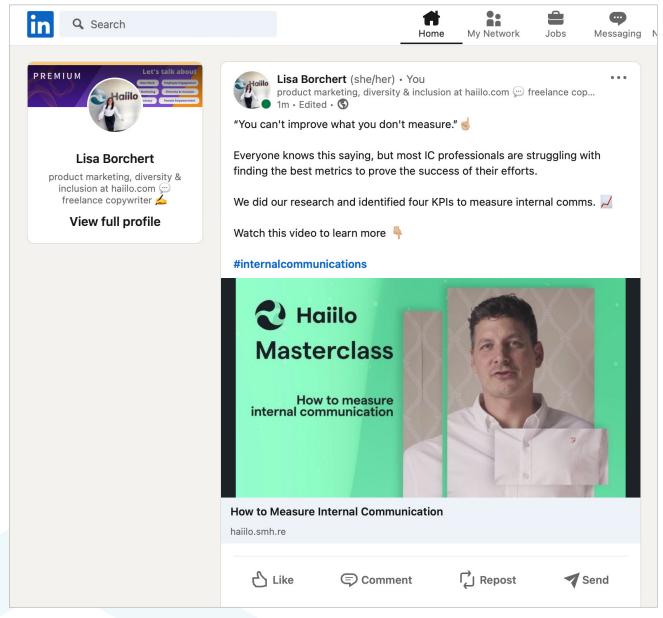
Each item of shareable content shows icons for the networks it is shareable to. Clicking on one of these brings up a dialogue box where the employee can use, adapt, or replace the suggested message for their network. We like that the advocacy module can provide a selection of messages to add a bit of variety and potentially enable different messages to be tested for effectiveness (although note it's not sophisticated enough to do full A/B testing). The employee also has options to share now, schedule the share for a particular time, or use smart share to send it at a time when it thinks it will be most effective.



Employees have the option of using suggested text, adapting, or replacing it altogether with their own message.



The tool has a gamification element as well. Employees can earn points for sharing messages to different social networks and, depending on the employee advocacy model, these can be used to achieve targets, earn rewards or simply bragging rights on a leaderboard.



The resulting article shared to LinkedIn.

# The mobile experience

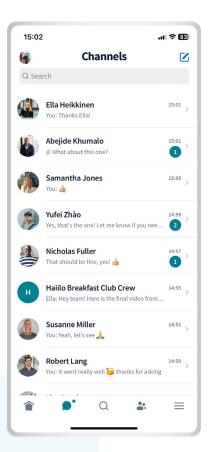
Haiilo translates very well to mobile, with a clean and contemporary experience for employees. Admins choose which widgets display in every space, including the home page (which could also vary between frontline and desk workers) and individual content Apps. Haiilo recommends that a personalised timeline is the default widget that employees see, particularly on mobile, which gives a tailored and easily understood experience for employees when they first access the app.

The chat feature would be a simple replacement for shadow tech such as WhatsApp, as it's available via both the Haiilo app and via the desktop environment too. Employees contact anyone else who is on Haiilo via a one-to-one message or group chat. There is the option to send attachments, such as voice messages, documents, or images, and reply using emojis. Employees see when a message has been sent, but not read. There is the option to mute conversations if they need to focus on another task.

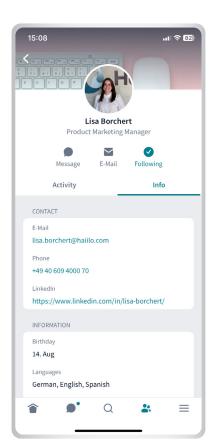
Employees search for colleagues within the people directory, found in the bottom menu, which returns attractive cards detailing information about the individual, and also their recent (public) activity on the site. Employees message, call, and email colleagues directly from these people cards using buttons along the top of the profile.



The home page shows different news threads.



The chat tool is simple but useful for frontline teams.



People cards are attractive and work well on small screens.

# THINGS TO BEAR IN MIND

Haiilo is one of the lower priced offerings in this report, even with a number of optional extras for Google Workspace, Microsoft 365 and analytics modules included. For organisations that don't need some or all of these, the price could be even more attractive.

While content can be targeted to different audiences, it is not as flexible as some other products in this report. The targeting mechanism relies on subscription to Pages and membership of Communities. Memberships and subscriptions can be controlled centrally in addition to being optional and under employee control, but it means that audiences cannot be built dynamically from rules.

Content governance features, particularly life cycle management, are not an area of strength for the product. We understand that Haiilo is working on this for 2023 but at the moment there is no easy way for intranet managers or content owners to keep track of content and when it is due for review.

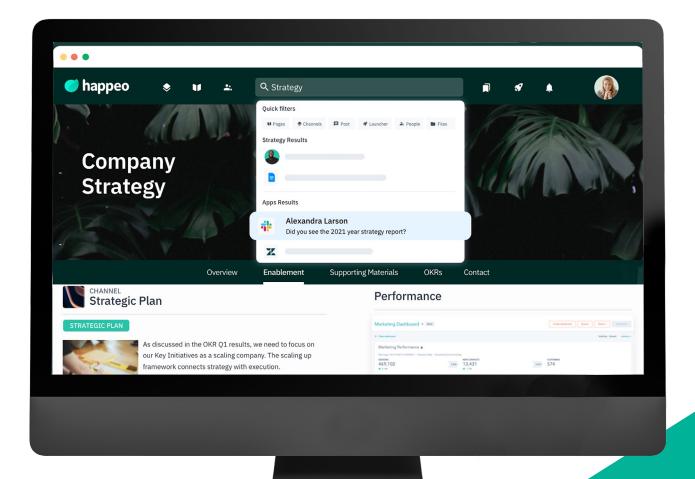
Haiilo has a strong German client base, many of whom will be attracted by the cloud platform's German data residency. Organisations based outside Germany will need to consider any implications for their deployment.

# Why choose this product

Haiilo is an easy to use and well-featured socially-enabled intranet that its customers love. It would suit a range of organisations from small to large, although it would probably appeal most to those that are looking to focus on employee engagement and content. The features are comparable for desktop and mobile users and the user experience is good on both. Administration features are powerful and simple to use, too.



# happeo



# Our view in one tweet

A bright, easy-to-use social intranet from @HappeoHQ with strong integrations and a powerful federated search that helps people connect with each other and find info wherever it's stored.



# Happeo owned by Happeo

Happeo was released in 2017 and is owned by a Finnish company of the same name, with offices in Europe and America as well as global partners. The Happeo platform offers a pleasant interface with a social intranet, top-down communications, and a powerful federated search experience. The platform uses feeds, widgets and integrations to display content from a range of sources. The activity feed interface makes it easy for users and communications professionals alike to share content, and there are post and article-level analytics available. The broader analytics package shows a good range of statistics in easy-to-read dashboards, which can be drilled down into further.

Happeo's search indexes document content and can be connected to tools like Slack, Jira and Confluence, which we can see would be a real benefit for product and project teams. There are deep integrations with Google

Workspace and it's now possible to connect to SharePoint and OneDrive, although Happeo integrates well with tools outside the Microsoft universe too. Some of the integrations have limitations, however.

Happeo offers intranet managers lots of widgets to present information. The interface is fairly straightforward but there are many options to get to grips with. There's training available as part of the onboarding process and Happeo also offers access to a customer community channel.

The product has a relatively high price-point, although larger organisations might be attracted by a lower price per user. Additionally, it does not aim to replicate the document management functionality of Google or Microsoft. However, we can see the powerful search and integrations could add a lot of value, particularly for technology-led companies and those looking for two-way communication with frontline employees.



# Summary table of scenario scores

# NO. SCENARIO/SCORE User experience and visual appeal 1 Mobile and frontline support 2 Internal communication 3 Community and engagement 4 Information finding and knowledge management 6 Admin experience and governance Analytics 7 Digital workplace integrations 8 Microsoft 365 integration 10 Wildcard

## **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription - price per user per month

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, multi-year commitments, businesses over 20,000 users. Price includes: Training for admins, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, hosting, onboarding user data, access to a community & webinars.

# Key benefits

- Happeo offers a strong federated search experience, with a recently enhanced user interface, that helps users find people and content across multiple systems.
- It's one of the few products that offers deep integrations with Google Workspace, as well as tools like Slack, Jira and Confluence.
- It offers user-generated content feeds, which we could see being valuable for organisations wanting to encourage frontline worker contributions.
- Happeo has created a suite of templates to make provisioning a new site easy, which we
  expect would be of real benefit to smaller organisations who need to set up a site quickly.

# Improvements and considerations

- The search user interface (UI) is strong and offers indexing across multiple sources, although search management options are limited.
- Happeo's Microsoft integrations are fairly basic, although improvements are on the roadmap.
- There are limited options to share communications outside of Happeo.
- Life cycle management features and multi-language tools aren't as extensive as other products in this report.



# **Product type**



# **Branding opportunities**

Good branding, complex options

# Target businesses





# Base systems



<sup>\*</sup>Optionally works with Google Workspace.

# **Sectors**



# You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



Company Happeo



Company founded

2017



Company locations

Helsinki, Finland (HQ), USA, UK, Romania, The Netherlands



ISO 27001 certified



Typical client size 300 - 5,000 employees

1

Largest deployment so far

38,000 employees, 39 countries



Partner locations
Global



#### Customers

Clients include: Pinterest, Decathlon, Marqeta, Algolia, Trimble, Randstad, Doctolib, Visma, Truepill, Vineyard Vines. Please <u>see their website</u> for details.

# Product and technical details

Name of product

Product launched

2017

Current version

N/A - continuously updated

Accessibility

WCAG 2.1 compliant



### Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant

Other

### Data residency

EEA region only, primarily in Belgium.

### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active Directory

**ADFS** 

Open ID

Oauth

**G** Suite

Other\*

\*SAML and OKTA

## Search technology

Apache Lucene/ Solr Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

## Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

## SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

### Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other

#### **Reverse-out options**

Happeo offers the option for an export of data from the application. Data is deleted within 6 months after ending the contract, to stay in line with their Data Processing Agreement, as well as GDPR.

#### Languages supported

Chinese simplified, Dutch, English US, English UK, Finnish, French, German, Italian, Japanese, Norwegian, Polish, Portuguese, Spanish, Swedish, Welsh. Content (Pages and automatic-content translations) language settings are available in 68 languages.

#### Machine translation

Yes - via the product

#### Right to left script

Nc

# Set-up and support

#### Set-up process for new clients

The technical set up is approximately a 2-hour workshop to complete user provisioning and integration enablement. Content set up is variable, depending on the customer's Minimum Viable Product (MVP) that they want to launch internally with.

## Product updates

Every 6 weeks for features, twice a week for improvements, and bugs can be fixed on a daily basis if needed.

## Product update process

Every 6 weeks, customers can decide timing if required. Smaller improvements come out on a weekly basis, and bug fixes daily as needed.

## Technical support

All day, every day support.

#### User community

Yearly customer summit events and online customer community.



## In their own words

Happeo says: "Happeo helps fast-moving companies control their information chaos by bringing together the knowledge, news and tools they need to keep growing. The outcome: less time spent on searching, more alignment on goals and progress, and better performing teams."

# Their view of the marketplace

Happeo says: "We aim to:

- Create a central source of truth for information and knowledge so every employee has access to the information they need to get their job done (without reinventing the wheel)
- Structure internal communications to reduce noise at the workplace, so employees can focus on what creates value
- Create a sense of culture and connection so employees are engaged and motivated to do their best work."

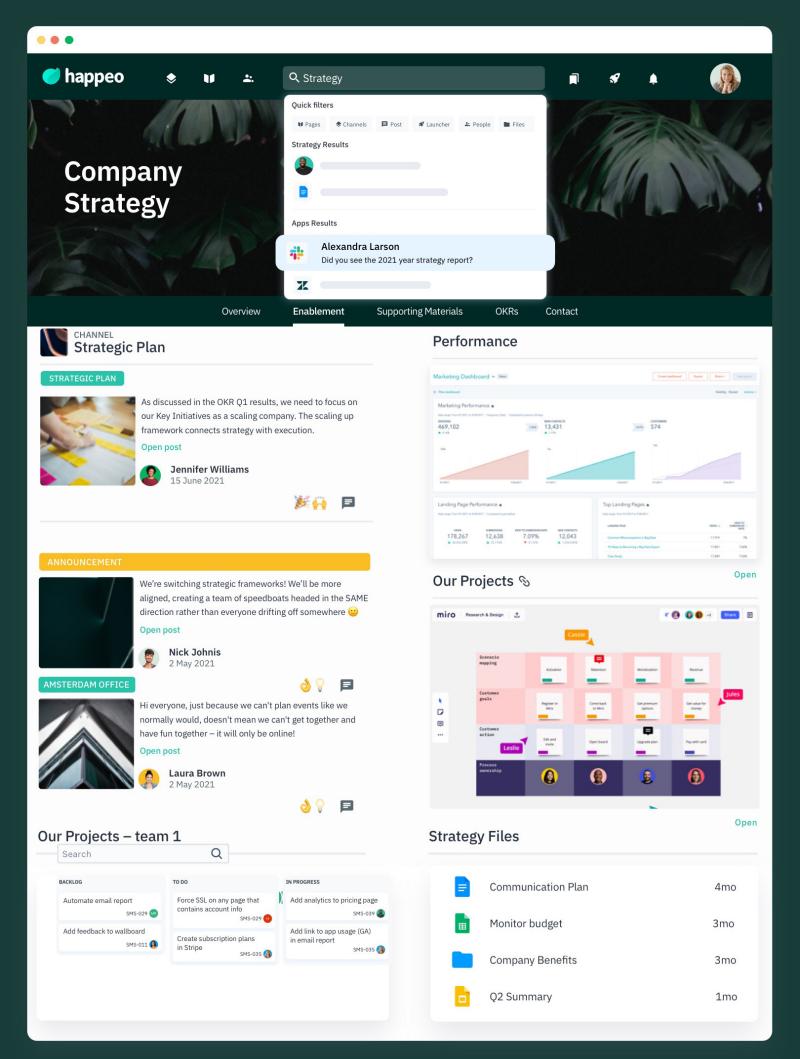
## Voice of the customer

We received a high volume of feedback about Happeo and all customers highlighted its ease of use as a big positive. One customer summarised well by saying, "you don't need specific technical skills to build content on Happeo because it has a modern design, a user-friendly interface, and is easy to use". The integration with Google was another highlight, where one customer added "the fact the UI has a very similar feel [to Google] is really helpful for helping drive adoption and usage". The admin tools were also described as "simple and intuitive" where one customer said it was "one of the best" CMS tools they had used. The search and branding options were also highlighted by some customers, and another added, "I appreciate the fact that it isn't just an Intranet you are getting, but also a community of people in the world of internal communications that are able to connect, exchange ideas etc."

Feedback about desired improvements were mixed, with a couple of people saying they were either happy with it or that "the changes we would like to see are already on the roadmap". More granular permissions, more third-party integrations, and an improved search were flagged by individual customers. "Enhancements to some of the modules already in place" was raised a few times, such as "message scheduling", and the relationship to "how these sit in the product roadmap / timeline" was also raised. More concerningly, a couple of customers mentioned that "it can be quite a glitchy platform" and there is a feeling that it's "scrappy'... (breakdowns, glitches, loose product release timelines)" that is then difficult for admins to manage. Lastly, the modular approach to pricing was also raised where it came across as "hey look at this cool thing – but you have to pay more for it".

When asked about the experience of working with Happeo as a vendor, the response was unanimously positive. One person said, "their team is always available for the customers, active listeners, approachable and pleasant to work with". Their transparent way of working was praised, with one person saying, "they have an authentic approach, and feel like I can really be open and honest with them". Another customer summarised well when they said, "Happeo's support is one of the best I have ever dealt with, and their Product Team is always open to customer suggestions".





# **REVIEW**

# 1. User experience and visual appeal

Happeo offers a pared back, clean user experience, with a feed-based home page that feels engaging, with plenty of white space. The feed-based presentation feels fresh and dynamic and is a nice way to incorporate corporate news with user-generated content.

The top navigation bar includes labelled icons to display channels, pages and people, along with a search bar, bookmarks and notifications, and a launcher to show shortcuts to frequently accessed systems and content. At first glance it may not be entirely clear to users about the difference between channels and pages. Pages are where static content is displayed, grouped by topic, theme or department, whereas channels are more community-oriented, with user-generated content. There are options to provide descriptions for content, which are displayed if someone hovers over a menu item and help signpost users to the correct destination.

Access is controlled by permissions, so users only see the content they're entitled to. Users may rearrange the order of pages and channels in their menu, or change the order of applications in the launcher menu.

The notifications menu includes an unread number, and users can set items as unread if there's something they'd like to return to. Channels can also be set so that users can't switch off notifications, something that should be used sparingly but could be useful for global news. There's an option to accept browser-notifications if users would like it, although we often see users pushing back on additional pop-ups, we know they are sometimes desired. There are also mobile push-notifications and email reminders.

Admins are given the tools they need to brand their site, with a range of settings available to provide clear branding options that can be applied to subsidiary companies. We particularly like the option to brand the various notification emails and automated round-up emails that are sent. There's also a wizard to help copy external branding into a site (see more in Scenario 10).

# 2. Mobile and frontline support

The Happeo app can be rolled out to users via MDM deployment, or users can download from the appropriate app store. Happeo don't help with user-provisioning; it's up to an organisation's IT department to onboard users. While it's possible to send an email link to invite new or external users onto the platform, this isn't auto-generated.

The mobile app has a clean navigation and user experience, which focuses on news feeds rather than the widgets displayed on the desktop home page. The default home page is 'My Stream', ahead of 'My news', although admins can amend the primary tab displayed



SCORE

to users. Search works broadly like it does on desktop, which is an improvement from previous versions featured in this report, although it's limited to searching content within Happeo and content within the connected Google or Microsoft ecosystems; it doesn't yet search across third party systems on mobile.

Even on a small screen device, it's easy to upload images, or attach documents stored locally as well as from Google Drive or SharePoint, and we can see that the app would be useful for people on the move. Users can access important links and documents via channels, and permissions are retained from the desktop application. The pages content displays cleanly and responsively, although not all integrated embedded content can display via the mobile app as many rely on iframes. A fallback option is to access content via a mobile browser.

There's limited admin functionality from mobile, it's possible to create, edit or delete posts within channels, but not currently articles or pages. Although admins may prefer to edit the site from a desktop device, other products reviewed offer mobile approaches too. Finally, although the site is responsive and adaptive, we would like to see the ability for admins to have the control over what widgets and other content is viewable between the desktop and mobile view, beyond the security settings.

## 3. Internal communication

score 3+

Happeo offers some nice options for internal communications. Communicators can choose between a regular post, a more detailed article, or an announcement. News is shared via channels then surfaced in feeds, and there are widgets available to display featured news articles and posts on the home page. There aren't any content scheduling or planning tools, and there's no built-in approval workflow; colleagues need to set their content to 'review' if it needs to be signed

off by someone else. We would like to see some automated processes to help here. Users can assign others to post on their behalf however, giving comms teams the flexibility to post for senior managers.

Channels can be invite-only, or discoverable to allow users to opt in. Channel membership is the way Happeo provides audience targeting, although it's possible to cross-post content in multiple channels. We can see value in setting up granular channels as part of the site provisioning process to provide future targeting opportunities, although this relies on accurate user profile data. Some businesses may choose to set up multiple sites to accommodate more complex content and organisational structures, particularly as the current page structure feels slightly limited for larger organisations.

Announcements stand out in the feed and include 'must-read' functionality (see more in the Highlights). Reminders stop once a user has confirmed they've read it, or once the announcement expiry date has passed, and this allows communicators to track readership. A helpful feature we'd like to see here is the ability to exclude certain people from reminders.

Pages are grouped thematically and it's easy to add hashtags to content to help users find related information and provide additional context. There are a number of optional page widgets that bring in helpful content like calendars or a card to show a page owner, see more in Scenario 6. Happeo has recently launched a set of page templates, which we can see being really useful when content managers have to create new sections.

There are limited options for communicating outside of Happeo. One is an auto-post option from selected channels into Slack or Google chat spaces. It's also possible to post into digital screens or for newsletters to be created from Happeo content, but this is completed through available APIs in other systems.



# 4. Community and engagement

SCORE 3+

Happeo offers a social intranet feed with options for users to post, comment and react to content, using @mentions, emojis, and gifs. It's easy for users to share content, from desktop or mobile, and Happeo encourages organisations to allow everyone to be able to post content somewhere on the site, to drive a community feel and genuine user engagement.

The content feed of each channel is displayed by publication date, unless posts have been pinned, and there is no collation of content such as 'most popular posts'. Users can comment on posts, but there is no moderation available, beyond manual deletion by an editor. We like the reactions that are available though, which go beyond simple thumbs up and hearts.

Channels can be used to post surveys and there are widgets to display Typeform and Google forms inline. MS Forms can be linked to or embedded into pages, but not displayed within widgets in the same way Google Forms can. There aren't any specific features for employee wellbeing or onboarding, although some clients use channels to present and curate information for new starters or employee recognition. Happeo are considering integrating wellbeing tools in future, but nothing is available now.

Pages can be used for projects with widgets such as project dashboards, aggregated calendars from the project team, and wikis that could be updated by anyone within the team. Given the search integrations with other collaborative tools, like Jira and Confluence, and the ability to surface content in widgets from tools, like SharePoint and Salesforce, Happeo can support simple project collaboration.

Generally, Happeo can support businesses' community needs by providing flexible shells in the form of channels and pages. There is a low barrier to publishing content too, so it encourages blogging and other forms of informal sharing. Those looking for dedicated tools, such as ideation or pulse surveys, may not find Happeo's tools as extensive as desired.

# 5. Information finding and knowledge management

SCORE 3.5

Happeo offers a clean search interface, with a type-ahead quick results box that starts to show frequently accessed content, and leads into a full results page where required. The UI (launched in late-2022) makes it easy to find and filter information from multiple sources. All content, both native and integrated, is indexed by the search, including the contents of attachments such as PDFs. See more in the Highlights.

However, there aren't currently any ways to indicate best bets or add additional weighting to key content and admins can't control the layout of the search results. Given the number of sources the search can index, a challenge we can see is that content needs to be tagged and structured appropriately to make it clear which pages or documents are the one version of the truth. Hashtags do come into play here to help somewhat, but we think further search management features would be beneficial. The current version of the Elasticsearch used within Happeo hasn't got fuzzy search, so it won't be able to retrieve misspellings or partially written words, although this is on the imminent roadmap.



There's an attractive people-finder that allows users to search by skill or any keyword within a profile, and the results cards allow users to chat or meet directly. Core profile data is surfaced from the user directory, although people are able to update their own skills list and bio. There's a nice feature in the results that promotes people you're more likely to be in contact with, for example showing people in the same division or team.

Files and folders are presented on pages or in channels within widgets. These are displayed either as a Google / SharePoint folder iframe, or by embedding a document directly on a page for a user to browse through. Interestingly, the breadcrumb information provided by SharePoint and OneDrive documents is clearer than that of Google Drive. An accordion widget is available to help present long lists or complex information. We can see the ability to add hashtags to content is useful as it helps users find relevant associated content, and the tags help provide additional context.

# 6. Admin experience and governance

score 3

Happeo offers two ways to administer the platform. First, there's a menu for site-level admin, where activities such as branding and user management take place. There aren't any granular permissions for different types of admin user, only one level can affect the site structure, so clients should agree a good governance process for this across comms and IT teams. There is a nice feature to make it easy for sites to match external branding (see Scenario 10 for more).

Owners and editors can be set up to manage pages and channels, which can be done insitu where new content is desired. The page-level admin has a relatively simple, easy-to-use interface with a good range of templates, although we'd like to see permissions set against templates to make sure content editors only have access to the appropriate ones for their part of the site.

Pages have widgets which can be used to display various content sources. We feel the range of configurable options could be overwhelming to a novice or occasional content manager but are more straightforward to use than many SharePoint web parts. However, we'd like to see a hashtag widget which displays all content tagged with a particular term.

There's no way out of the box for users to flag content is out of date, but it is possible to add a card to each page to show the page owner and contact details. Alternatively, Happeo says that some clients build a Google form or similar and pin it to the launcher menu to manage feedback. We like that there are analytics that monitor whether channels and pages are 'stale', as defined by admins, which will send a notification to the owner to propose it is archived. It's up to the owner to make that decision however, then the whole channel or page is archived.

There's a nice feature which allows users to translate user-generated content on the fly. Alternatively, content owners can provide manual translations for articles to ensure that important messages and key terms don't get mis-translated. We would like to see an option for page content to also be auto-translated like the posts; we can see value with providing 'official' translations, but there's no link however between different language versions of pages so any updates would need to be completed manually.



# 7. Analytics

# SCORE

Happeo offers built-in analytics across the platform, both on-page and via the analytics menu. We particularly like the post and article-level analytics. These give in-context stats for communicators to see how popular content is, with statistics around impressions and reactions, along with a percentage of how many members of a channel have seen that content. See more in the Highlights.

The analytics menu offers an overview dashboard, along with views for 'channels', 'pages', 'people' and 'search', each of which can be drilled down into to get more details. We'd like to see a filter to be able to drill down by hashtag, particularly given how much the site relies on tags to help find content. This would also be a valuable addition for communicators tracking engagement across campaigns or content themes. It would also be great to see viewing statistics vs the size of the potential audience within the analytics menu. Given the platform relies on channels to target users, communicators will have to extrapolate the data themselves to see which groups have the highest percentage of an engaged audience.

'Announcement posts' offer tracking, so communicators can see who has read the article, along with an option to send a follow-up reminder to those who have not confirmed receipt. It's also possible to export the list of users who haven't read the content.

We can see a lot of value in the search analysis provided, particularly given the lack of ability to manage search itself. Admins can use the data to see which terms caused users to give up and be able to update the content accordingly. It's also possible to extract the search data as a CSV to conduct further analysis.

There are no analytics available to track communication campaigns or testing, although this is on the roadmap and publishers can see analytics on their posts. Additionally, as Happeo doesn't offer in-built services such as polls or surveys (but also on their roadmap), analytics are understandably missing for those features. The platform analytics work well, however.

# 8. Digital workplace integrations

# 1.5+

Happeo offers a 'launcher' icon on the main navigation, which is a little like a 'quick links' menu. It is often used by clients to offer shortcuts to other applications, along with widgets to bring content into the platform. Many applications can be accessed via Single Sign-On (SSO) where they support SAML; app integrations available include Zoom, Jabber, Webex, M365 along with Google Workspace.

Happeo offers an App Marketplace, via the admin menu, where administrators are able to install additional apps and widgets. Admins can also submit an application to add their own developed app to the Marketplace. Available widgets include ones to show users their Outlook / Google calendar and email inbox, Slack DMs, along with Jira boards, a ticket overview for Zendesk and more. We can see digital agencies and organisations who make use of a lot of developer tools finding the enterprise search a real asset, although integrations aren't yet as deep with M365 (see Scenario 9).

However, many of the integrations rely on iframes, which isn't always ideal from an end user perspective. Mobile-first users may have to use the mobile browser version or get access to



a desktop if they want to see certain content, particularly data-heavy displays. Happeo says they are investigating options as part of their ongoing improvement work to see what could be done to improve this experience.

The search can also help cut down the time to find and respond to comments sent across applications, as the content of these is federated. The Happeo search will index content in attachments as it goes too. We can see this being really valuable for tech-forward organisations. However, the flipside of this search experience (see Scenario 5) is that it's not always that clear where documents originate from, particularly if stored in Google Drive, and it indexes everything, so clear signposting and labelling of content is key.

# 9. Microsoft 365 integration

# score 2

Happeo launched its integrations with M365 in early 2022, and continues to improve and deepen the connections. However, options are not as in-depth as those available for Google Workspace and other business systems mentioned above. While there are currently fewer integrations than other products in the report, the speed of development and smooth user experience suggests that future development will be speedy and well executed too.

Happeo integrates with content from SharePoint and OneDrive, and the signposting information which indicates where documents are stored is clearer for Microsoft documents than that displayed for Google. Document libraries can be displayed within widgets and provide document previews via an iframe. SharePoint and OneDrive are also available as a source of content attachments for posts.

It's now possible to message or start calls from people cards into MS Teams, although it opens in the separate application. There aren't any other integrations yet available for MS Teams.

Happeo is used instead of Yammer for existing clients so understandably there's no integration, particularly as there's a lot of overlapping functionality.

The federated search works well and only displays the content users have permission to access. Documents are presented in quick results, full search results, and also via the appropriate filter, which is now presented along with the app-related icon to make it easier to differentiate. See more in the Highlights.

Finally, Microsoft Forms and Power BI dashboards can be integrated via iframes into Happeo.

## 10. Wildcard



In mid-2022 Happeo launched a wizard which makes it easy to set up a brandnew intranet, with demo content available with a just few clicks. There's a process for smaller organisations and one which takes larger organisational needs into consideration. We can see scenarios where the wizard can dramatically reduce the time it takes to create and structure a new intranet. Please see the Highlights for details.

The wizard can detect branding based on an existing website, which we can see offering a



lot of value to clients who want to get started quickly, although many organisations may choose to brand their intranets differently. There are a number of templates available to help admins create a clear home page, along with suggested menus, navigation and placeholder content. However, while there are features and content found on many intranets, we think it would be remiss of organisations to create a new site without having a clear idea of their user needs first, as one size rarely fits all.

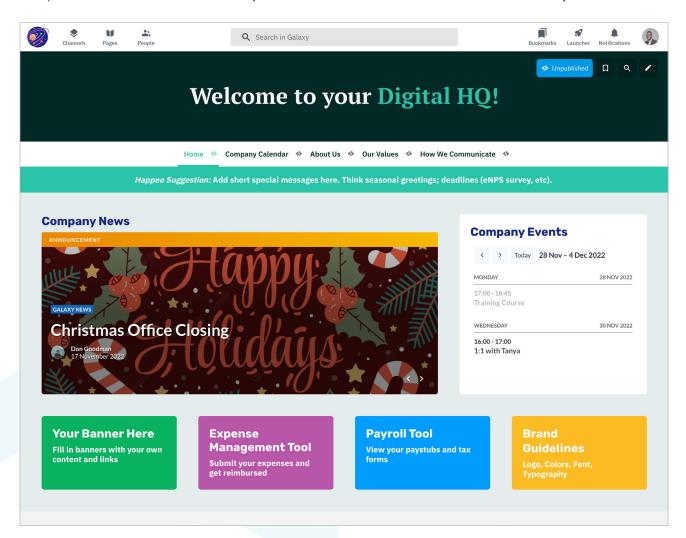
Overall, we can see the wizard being particularly useful for smaller organisations who want to get going quickly, as well as making it easy for larger multi-brand companies to provide a number of sub-sites to get set up fast. However, a risk we see with tools that provide good dummy content is that it can be easy to overlook sample content, and communicators in a hurry might not always spot where content hasn't been personalised. It would be good to see features introduced into the wizard that would encourage publishers to personalise content and for admins to see where something hasn't been touched from the original set-up. For example, a helpful addition would be a checklist as part of the wizard that shows which content still needs to be reviewed before launch.



# **PRODUCT HIGHLIGHTS**

# Fast site set-up wizard and templates

As mentioned in Scenario 10, Happeo has introduced a process to help clients set up a new intranet, quickly. Happeo's user research suggests that one of the hardest things about creating a new site is getting started. Providing a framework can help teams kick-start their projects, rather than starting with a blank canvas, and branding can be inherited from an existing website. Suggested pages and channels are populated with templates that offer clear descriptive text and sample content blocks. It's also easy for admins to edit, add or remove content they don't need.

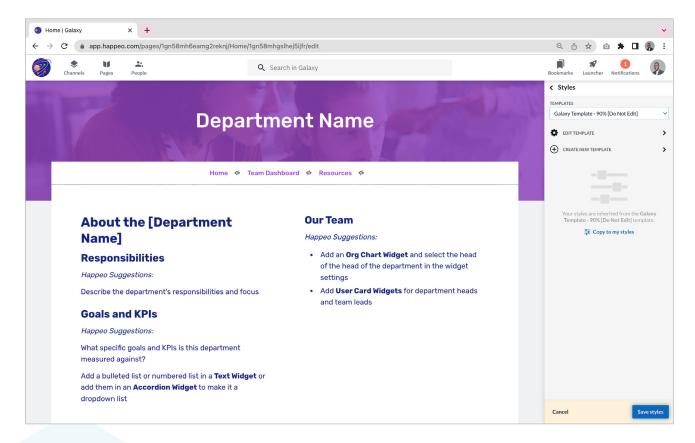


The templates offer a range of suggested content widgets with descriptions on how to use them.



There are some nice touches as part of this process, such as a widget that shows a user's calendar (depending on how they have authenticated their details). Some of the widgets look like they've been populated at a glance, although they're only placeholders, so it's important for admins to take some time to make sure any content they decide to keep is appropriate for their organisation.

There are a range of templates built in for use beyond the initial set-up and launch, along with suggested menus, navigation and placeholder content. Clients can create their own version of templates too, which we can see being invaluable for organisations wanting to create a consistent user experience across areas of the site.

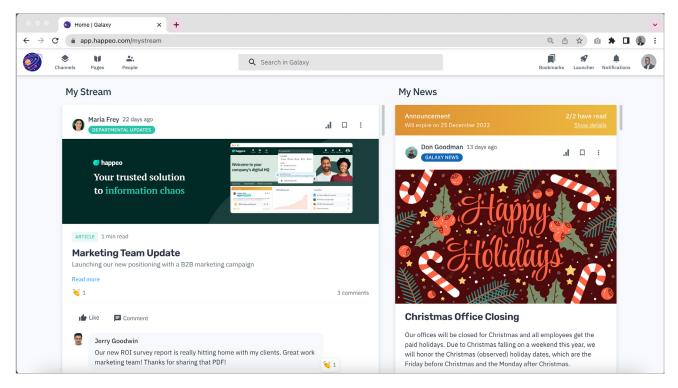


Customisable templates to make it easy to set up page-level content.



# A social news feed which tracks engagement

Happeo offers a social, dynamic home page feed that can present user-generated content alongside pinned news and announcements, with widgets available to highlight selected content. We like the fresh feel of the layout, which feels more like a social media platform home page than a traditional intranet, although there are navigation options and widgets available to access more static content, too.

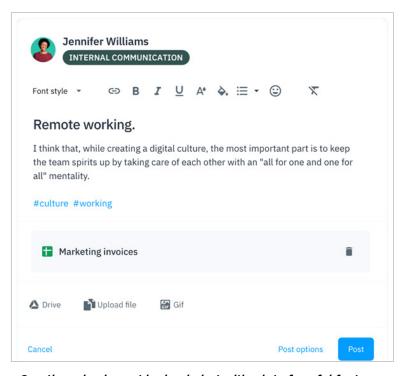


The home page presents user-generated news alongside news and announcements.

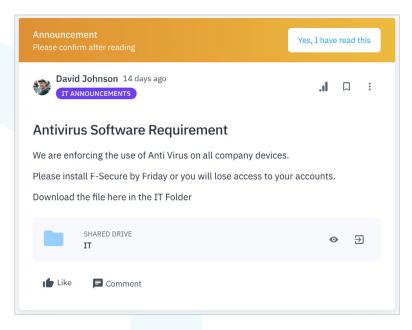


News can be shared in the form of short posts, like a tweet, or longer articles like a more traditional intranet. Any user can share short posts directly into the channel activity feed, where there are simple formatting options and where multimedia can be added such as GIFs. We liked that GIFs auto-play within the activity feed, adding movement and something fun into the thread of posts.

Within the feed, 'announcement' posts stand out among other communications. Announcements can be used by communicators to send urgent and important news, with the ability to track readership and target users who haven't yet read the content. Users have to confirm once they have read an article and if they don't, they will continue to receive reminders until they confirm or until an expiry date is met. Communicators are then able to download a report to track readership.



Creating a basic post is simple but with a lot of useful features.

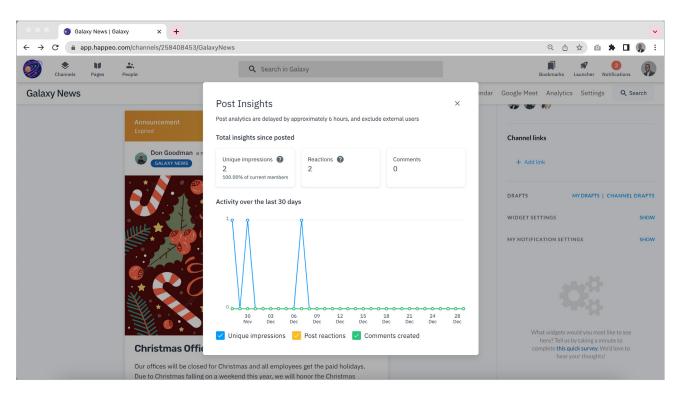


Users need to confirm they've read an article to stop receiving reminders.

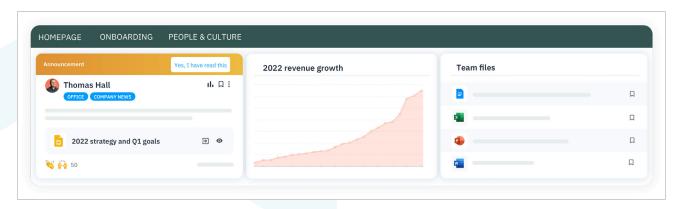


For content within the feed there are post-level analytics, where users can see how their posts have performed. The presentation is simple to absorb at a glance yet shows a helpful summary of information that publishers can consider for future posts.

Announcements can be used by communicators to send urgent and important news, with the ability to track readership and target users who haven't yet read the content. Users have to confirm once they have read an article – and if they don't, they continue to receive reminders until they select the appropriate option. An expiry date can be set, with reminders that stop once a user has confirmed they've read it and allows communicators to track readership.



Post Insights give publishers a snapshot of their post's performance.

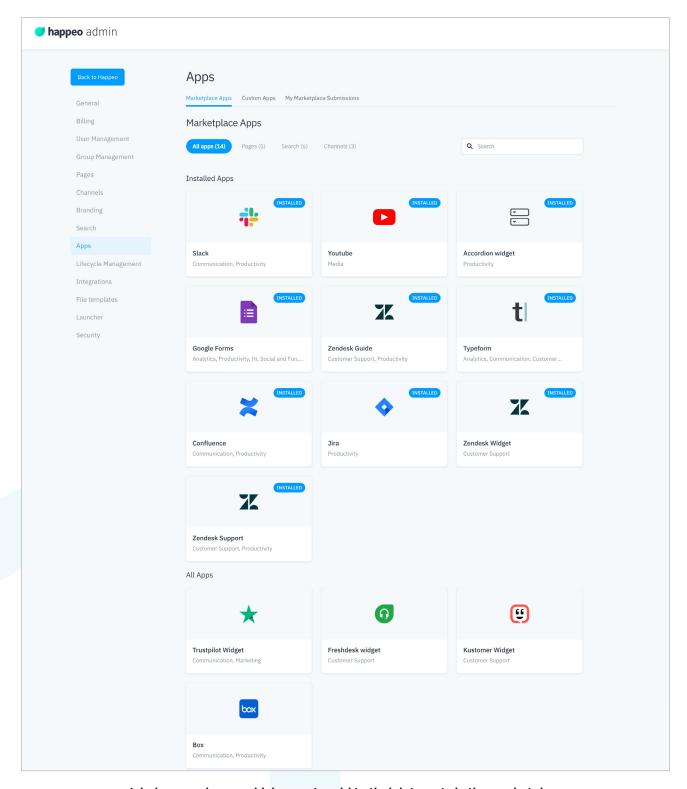


Widgets can display content from other systems - often using iframes.



# App marketplace

The 'app marketplace' includes widgets that have been created across Happeo to-date. These widgets could be for integrations, such as with Jira, or could be for display purposes, such as the accordion mentioned above. The marketplace is found in the admin menu and it's easy to see what has been installed, or what's new.

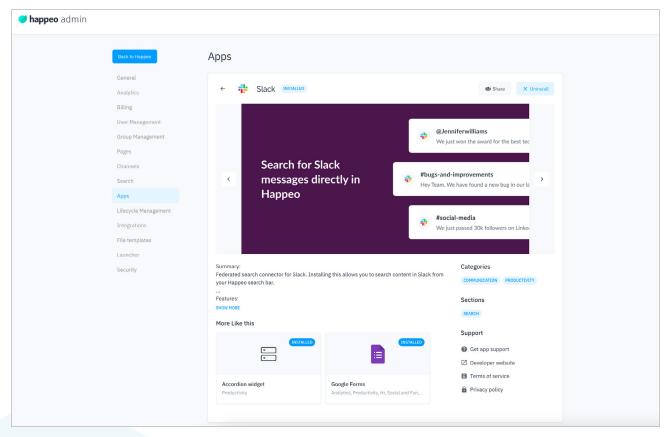


Admins can choose which apps to add to their intranet via the marketplace.



Clicking on a marketplace option opens a new screen that provides an overview of the app, including screenshots, a summary of features, and the categories the app falls into (such as 'productivity' or 'communications'). Admins can also browse similar apps from this screen, which we can see will be helpful as the marketplace grows. Where admins choose to install an app, they can do so from a one-click button within the app's page.

Where clients and Happeo partners have created additional apps, they may choose to share them via the marketplace. Apps are uploaded via five simple steps, keeping the app pages consistent within the marketplace. Happeo says that feedback about the developer website (to support the creation of apps) has been positive, and it certainly seemed comprehensive yet clear from what we saw.

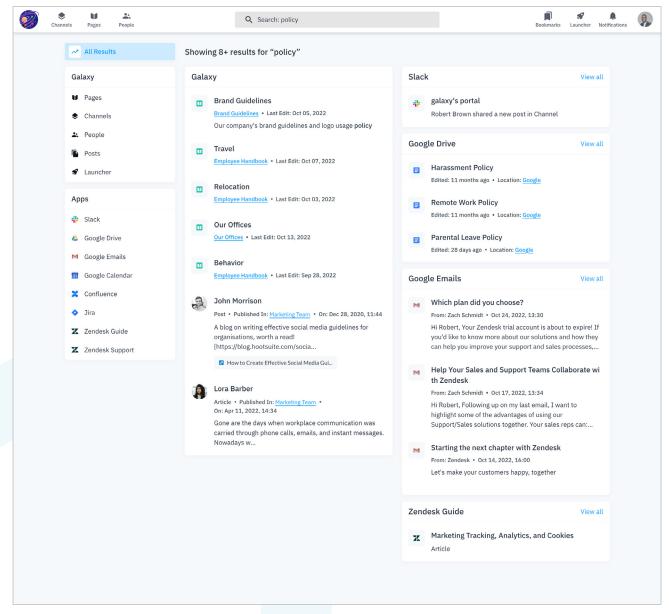


Each app includes an overview page, giving admins all the information they need to decide whether to install it or not.

# An integrated search experience

Happeo offers a clean search interface, with a type-ahead quick results box that starts to show frequently accessed content, and leads into a full results page where required. The UI (launched in late-2022) makes it easy to find and filter information from multiple sources. All content, both native and integrated, is indexed by the search, including the contents of attachments such as PDFs.

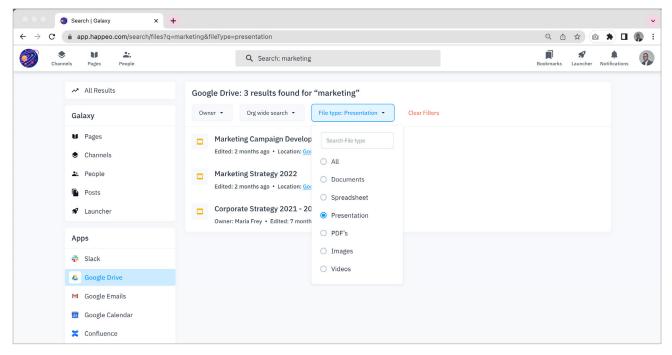
Happeo offers a strong, federated search experience, with a simple UI. We particularly like the ability to index the content of documents and items within connected systems like Jira or Confluence, something the Happeo team themselves have found to be a real time-saver for users. The federated search is also helpful if someone can't remember where a colleague messaged them - was that a Slack message, a comment on a Google Doc or a ticket on Jira? The comments are indexed and will be displayed in search results.



It's easy to see different search sources in one clean interface.



The search interface offers a range of filters, including content type and search source. SharePoint and OneDrive files can be found via the 'Microsoft Files' filter, which we actually think is a helpful label as many users don't know the difference. We like the clean layout, which provides a clear way to differentiate between the different sources.



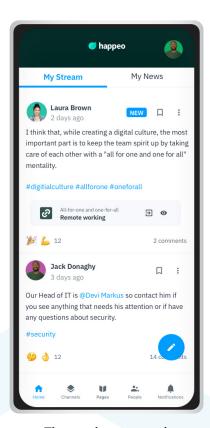
Filters are available to help users search across applications.

# Mobile experience

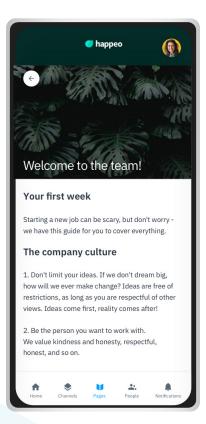
The app home page displays a feed of content tailored to the user, which is based on the channels they follow. Announcements, with associated 'mandatory read' style tracking, stand out effectively and users can easily interact with whatever appears in their feed. Notifications are gathered within a dedicated menu, which highlights those that are unread for easy browsing.

Users can navigate into specific channels through the option in the bottom menu, and they can bookmark their favourites for quick access. The number of new posts is highlighted in each channel, making it really easy for users to decide where to visit. Channels themselves include the activity feed, plus a 'media' tab for any documents associated with the channel.

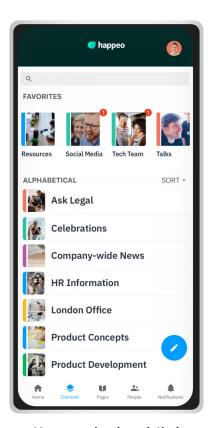
All pages are available through the app, however their presentation is simplified to help with page load. Some widgets, such as iframes, are removed altogether. Documents open within Google files or SharePoint, meaning that users don't have to download a document to check that it's the one they really want. Finally, the people search is as effective on mobile as it is on desktop and users can begin calls or emails from within the people cards.



The app home page is transformed into an effective feed.



Pages still look attractive, even on a small screen.



Users can bookmark their favourite channels and see where colleagues have been posting.



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# THINGS TO BEAR IN MIND

The integrations with Google Workspace are extensive, although the product isn't as closely linked yet with the Microsoft 365 suite. However, we're encouraged by recent improvements to these integrations and can see the product evolving at pace, with further developments due on their roadmap. There are a lot of overlaps in functionality with Yammer and MS Teams, so if you already use those in your organisation, you'll need to consider what to use when and guide people accordingly. Happeo says that many clients use their platform instead of Yammer, however.

Happeo has taken a deliberate decision not to build a document management repository and relies on its integrations with other platforms, like Google and Microsoft, so clients will need to have a solution in place if they want to store documents. The search engine offers a powerful experience which can index multiple sources that will help with multiple content sources. However, content managers will need to make sure information is labelled clearly, particularly with content stored in Google Drive, to show which is the one version of the truth.

The platform relies heavily on channels and pinned posts to present users with content. While there are widgets to show latest, or top news, we can see that the engaging, streamfocused nature of the channels may not be to every communication team's taste. At least part of the success of Happeo relies on giving employees the ability to create and engage with content themselves; while this can easily be restricted to specific channels, we can see that organisations without an open culture may decide not to select this platform.

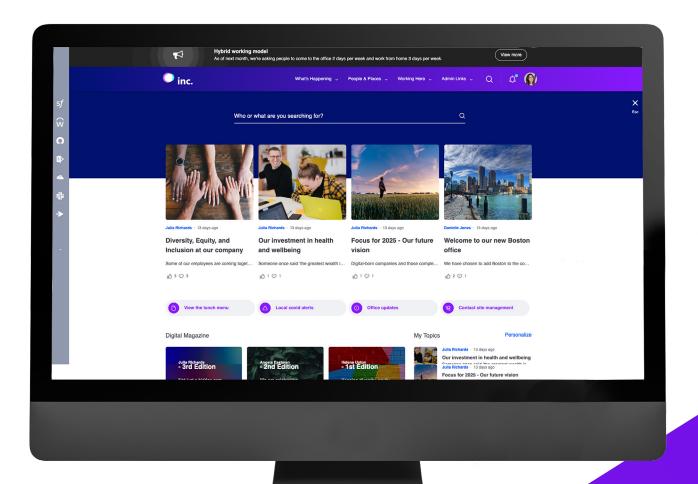
Finally, it's important to note that Happeo is hosted by the vendor. Additionally, data is stored within the EEA region only, primarily in Belgium, which may be of comfort to UK and EU-based organisations, but is something to take into consideration for global organisations.

# Why choose this product

Happeo is ideal for organisations who want to provide a joined-up, search-led experience across their internal channels. It provides an engaging, social intranet which we can see being particularly valuable to businesses with developer teams working across multiple platforms, as well as companies with frontline staff who need to provide short updates to their colleagues. Overall, Happeo would particularly suit small or medium sized businesses who want to get started quickly, and larger organisations with a more centralised publishing approach. Those looking for an effective social and collaborative tool would be pleased with its simple-to-use features, which are all delivered well.



# interact



# Our view in one tweet

Interact from @IntranetExperts is packed full of attractive and useful features that are easy and pleasant to use.



Interact is owned by UK-based Interact, who also have a presence in America and Australia. The company was founded in 1996 and their experience of the market is clear to see in this contemporary, user-friendly platform.

Interact provides attractive and flexibly branded intranets, with an easy-to-use interface, and there is a lot to like about it as an intranet solution. There are strong news and content creation tools, which have been improved further by its page 'block builder' (released in early 2022) with a range of new features. Its social and community tools are good and the approach to digital signage is simple but very effective. The analytics and app were updated in mid-2022 and these also work well. These features combine effectively, providing a solution that will appeal to internal communicators.

Integrations with business

systems are basic out-of-the-box, but there is a developer framework available to extend the product further. There are more options for integrations with M365 applications, although there are gaps here too. The development work on the app, analytics, and page builder have brought improvements, however, there are still gaps and further work to be done. Additionally, as a result of these improvements there are clearer gaps in the admin UX emerging that need to be addressed.

Overall, Interact is a mature product with excellent and varied features that will meet the needs of most businesses. While it's in the higher price bracket, there are a number of optional modules included in the pricing provided to us. Where features aren't needed, such as the digital signage solution, businesses will see a significant drop in cost.



# Summary table of scenario scores

# NO. SCENARIO/SCORE User experience and visual appeal Mobile and frontline support 3 Internal communication Community and engagement Information finding and knowledge management 5 6 Admin experience and governance **Analytics** 7 Digital workplace integrations Microsoft 365 integration Wildcard 10

# Pricing

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### PRICING MODEL

Subscription - price per user per month

#### **PRICING NOTES**

Discounts available for: Charities and nonprofit organisations, schools and educational institutes, frontline users, multi-year commitments.

Price includes: Project workshops, training for admins, training for end users, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, Microsoft 365 set-up, hosting, onboarding user data, access to a community & webinars, consulting services, Pulse surveys, language translation, Digital Signage.

# Key benefits

- Interact delivers an excellent user experience, with a good range of flexible features for admins too.
- There is a wide range of features on offer for customers to choose from, supporting business needs such as employee recognition, sharing news externally, and creating communities of practice.
- The page 'block builder' is a great tool, with some unusual and helpful features such as an 'inclusivity checker'.
- The search and browsing experiences are very effective.

# Improvements and considerations

- Integrations with business systems are limited out-of-the-box, although there are more available integration approaches with M365 applications.
- There are gaps in functionality across some core features (such as in the app and with news management) that would benefit from development.
- The gap in UX between the older areas of functionality and the newer is getting larger, particularly for admins.



# **Product type**



# **Branding opportunities**

All branding, complex options

# Target businesses



**SMALL** less than 1,000 people



**MEDIUM** 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems









**Fully** standalone

Requires SharePoint Optionally works with SharePoint

Other

# **Sectors**





Retail



Healthcare



Information technology



Science and pharmaceuticals

You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



Company Interact



Company founded



Company locations
Manchester, UK (HQ), USA



ISO 27001 certified



Typical client size 6,000 employees



Largest deployment so far

100,000 employees



Partner locations

Australia, Germany



#### Customers

Clients include: Levi Strauss and Co, Domino's, Teva Pharmaceuticals, Columbia Sportswear, New York Life, Activision Blizzard, and Sony Interactive Entertainment.

# Product and technical details

Name of product	Interact
Product launched	2014
Current version	7.9
Accessibility	WCAG 2.1 compliant



#### Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant

Other

#### Data residency

For public cloud: EU and the USA. For private cloud, there are extensive options available.

#### Client data encrypted

In transit only

In transit and at rest

At rest only

### **Authentication supported**

Azure Active Directory

**ADFS** 

Open ID

Oauth

G Suite

Other

### Search technology

Apache Lucene/ Solr Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

## Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other\*

\*Confluence

# SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

## Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other

#### Reverse-out options

Interact will provide all data in a human-readable format. All uploaded content (including PDFs and images) will be returned in a simple folder structure along with a CSV export of data contained with the service (including profiles, HTML pages and category structures). In addition, Interact will provide a SQL backup (unencrypted) of the customer database. Customer Data will be returned by secure transfer via an AWS S3 bucket.

#### Languages supported

Using Microsoft Azure there are 110 in total: Afrikaans, Albanian, Amharic, Arabic, Armenian, Assamese, Azerbaijani (Latin), Bangla, Bashkir, Basque, Bosnian (latin), Bulgarian, Cantonese (Traditional), Catalan, Chinese (Literary), Chinese (Simplified), Chinese (Traditional), Croatian, Czech, Danish, Dari, Divehi, Dutch, English, English US, Estonian, Faroese, Fijian, Filipino, Finnish, French, French (Canada), Galician, Georgian, German, Greek, Gujarati, Haitian Creole, Hebrew, Hindi, Hmong Daw, Hungarian, Icelandic, Indonesian, Inuinnaqtun, Inuktitut, Inuktitut (Latin), Irish, Italian, Japanese, Kannada, Kazakh, Khmer, Kiswahili, Korean, Kurdish (Central), Kurdish (Northern), Kyrgyz (Cyrillic), Lao, Latvian, Lithuanian, Macedonian, Malagasy, Malay, Malayalam, Maltese, Maori, Marathi, Mongolian (Cyrillic), Mongolian (Traditional), Myanmar, Nepali, Norwegian, Odia, Pashto, Persian, Polish, Portuguese, Portuguese (Portugal), Punjabi, Queretaro Otomi, Romanian, Russian, Samoan, Serbian (Cyrillic), Serbian (Latin), Slovak, Slovenian, Somali (Arabic), Spanish, Swedish, Tahitian, Tamil, Tatar (Latin), Telugu, Thai, Tibetan, Tigrinya, Tongan, Turkish, Turkmen (Latin), Ukrainian, Upper Sorbian, Urdu, Uyghur (Arabic), Uzbek (Latin), Vietnamese, Welsh, Yucatec Maya, Zulu.

#### Machine translation

Yes - via the product

#### Right to left script

Yes

# Set-up and support

## Set-up process for new clients

Every customer is different (e.g., phased launch vs big bang) however deployment times are typically between 6 to 10 weeks for initial go live for a phased MVP launch. Faster deployments can be achieved if required.

## **Product updates**

Typically, monthly with zero downtime.

## Product update process

Software updates are managed and implemented by the Interact Cloud team. Customers are not required to install or maintain any hardware or software. Updates include new features, security updates, and bug fixes. Interact typically deploys a new release every calendar month. Releases are applied without loss of service or downtime to ensure users are unaffected. Release notes for each update are published to the Interact Community. New features are deployed in an 'off state'.

## Technical support

Interact's service desk is responsible for incident, change and problem management which covers people, processes, and technology for systematic tracking. The service desk is based in both the US and the UK. There are three tiers of support; Silver (standard), Gold, and Platinum. Customers can submit, track, and resolve cases by phone, live chat, email and via the Customer Community Portal.

## User community

Interact offers an online community for 1,000+ customers with over 8,000 members. It provides information on product updates, forums, idea sharing, feature enhancement discussions and voting, events, engagement / adoption ideas, launch ideas, training documentation, guides, videos and more. Interact host regular online events including an annual 'Interact Live' event for customers only.



## In their own words

Interact says: "Interact is enterprise-grade intranet software serving over 1,000 customers and millions of employees. Our mission is to inform and connect every organization's greatest asset: its people."

# Their view of the marketplace

Interact says: "The most successful workplaces understand that higher levels of employee engagement and a positive employee experience help improve productivity, retain and attract talent, and enhance the customer experience. Internal communicators seek to drive engagement by connecting the business with employees, but they face challenges from disparate technologies, dispersed and offline workers, time zones/languages, and frequent organizational change. Interact is enterprise-grade intranet software built for communicators with multichannel messaging and measurement to help reach every employee."

## Voice of the customer

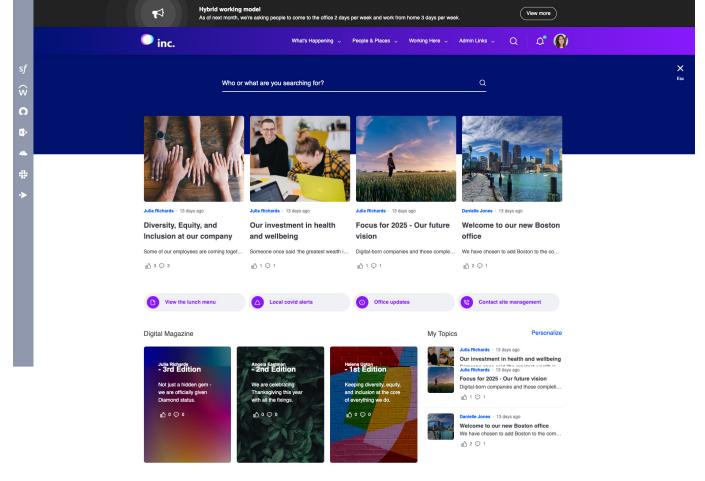
Feedback was almost unanimous about the ease of using Interact, which one customer summarised well by saying it's "easy to use" and "also easy for our admins and authors to use too". Another person echoed this sentiment adding that "you don't need a degree in SharePoint, nor do you need to be best friends with the IT team to make changes to the look and feel and structure". The "constantly evolving" nature of the product was praised, as was Interact's focus on internal comms where one person said, "Interact provides strong value to help us communicate to our employees effectively." The recently updated app and block builder were highlighted as capable features, and one person added "I like that URLs are not location dependent so it's easy to move things about without breaking links".

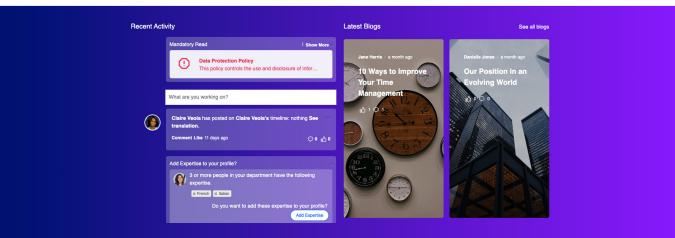
Requests for changes varied, although a few themes stood out. First, there were requests for "a bit more robustness with integration options with other technologies". A request for "the number of views per content area" and to "be allowed to filter by day, week, year" within the analytics is still relevant, despite the updated analytics we saw for this review. Older parts of the intranet were highlighted as needing a refresh, where one person said, "the forms tool has never really worked to the same standard as the rest of the intranet – that's one bit where you do need a degree".

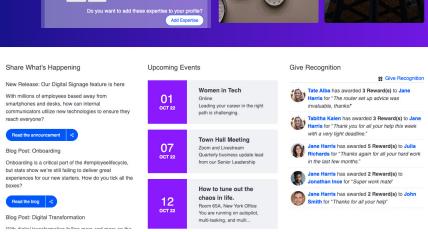
Although the evolving nature was praised, customers highlighted that bugs were often an unfortunate side effect. One customer added that "the roadmap is a scattergun" and they would like updates to reflect customer requests or bug fixes more than they do now. The improvements to the app were also praised, however a couple of customers criticised the route to improvement; with one saying, "when we first got [the app] it was a bit of a disappointment and seemed to be stuck in beta for a long time, so it felt a little like we were oversold that at the time".

Overall, the experience of working with Interact has been described as "fantastic" and "excellent", where they have been described as "very helpful" and "responsive". One customer expanded by saying, "they go above and beyond to listen and provide solutions for our intranet needs". Another customer was very effusive and said, "our client/vendor meetings are not only enjoyable but also very productive. My account support is constantly looking for ways for us to improve our site so that it continues to be impactful, resourceful and engaging to our team". However, one customer hasn't had such a good experience, explaining they "had five Project Managers in our project phase due to a high turnover" and experienced a "high volume of bugs", including "AWS issue and [app] authentication problems".



















# **REVIEW**

# 1. User experience and visual appeal



SCORE 4.5

Interact is a visually appealing and contemporary product, which gives an excellent end-user experience. We like the 'Your recommendations' button that displays curated content, which suggests pages based on the user's past activity, as well as popular content. This is a simple way for users to find things that are relevant for them, without impacting on the carefully designed home page.

A persistent top menu contains site navigation, which can be a mega- or simple menu and can be audience targeted. Other menu layout options, such as those that can feature an image or promoted content, would be a nice addition. Also within the top menu bar is a user profile icon, which displays a summary of activities or settings associated with the user. This includes an option to add a blog post, as well as access to admin settings where relevant. A persistent menu on the left of the screen gives users access to practical tools and integrations (see Scenarios 8 and g). A footer includes links and a breadcrumb trail.

Notifications from Interact or integrated systems are found via an icon in the top menu, where users can see them all or split by origin. New notifications are coloured, with mandatory reads highlighted in red, and they show a thumbnail image relating to the activity. Users can mark notifications as read and choose whether to only see new notifications or toggle to see them all.

Branding options are flexible and varied, creating attractive sites. Additionally, multiple businesses in one instance of Interact could look very different to each other. This can be achieved through audience targeting of home pages, navigation, and content, as well as through flexible branding options. Please see Scenario 3 for more on audience targeting and the Highlights for more on home pages. However, as a user goes further into the intranet, such as into policy libraries or Interact forms, some of the visual appeal decreases. We feel that some of these deeper areas of the platform could benefit from a facelift.

# 2. Mobile and frontline support

3.5+

An app is available via the app stores, MDM and MAM; called 'my intranet' (rather than 'Interact') and with a neutral logo, it's easier for internal comms to explain what it's for and that it's a beneficial tool. Customers can choose to mix-and-match the origin of user data, such as via an HR system plus AD, or users can be held within and managed via the intranet. Alternatively, there is the option of single sign-on from other systems. A user needs to exist in one of

these databases before they can login, however an introductory email or SMS can be sent to new users that will get them instant access. Biometrics are supported for subsequent access.

Once inside the experience in the app is consistent with the desktop; this includes branding, although white labelling is an additional cost. Home pages, landing pages and navigation will

reflect whatever's shown on desktop, but these can vary for groups of users. For example, a dedicated home page and navigation for 'frontline workers' would display only for that persona on all devices. A 'blog' menu lets people create short articles via a simple form and people can subscribe to topics or edit their profile from within the app.

Content pages display well on mobile which, unusually, includes reference material. Where documents have been uploaded, the app will show a preview for people to scroll through without downloading. Push notifications work well, as do 'Broadcasts' (see Scenario 3). Pulse surveys are on the roadmap. Some integrations don't work, such as the ServiceNow widgets, as they have been designed for a web interface, although notifications will still pull through to the bell. A site-wide content search and people finder operate effectively, although the people search is restricted to name, job, title and phone number.

However, we noticed that longer widget titles can overlap with buttons (such as 'From the leadership team' with the associated 'see all blogs' button); admins will have to test design choices, but this is simple enough to do. When navigating through the app we found some pages a little slow to load, and attempting to move back through navigation sometimes brought us entirely back to the home page. As the Interact app was revised in late-2022 there are a few bugs still to iron out, but overall it works well.

#### 3. Internal communication

SCORE

Overall, Interact's internal communication features are very good. Please see the Highlights for much of the detail.

Publishers can create news and content either from the relevant site on the intranet, or from a central location in the back end. A 'block builder' allows publishers to drop blocks of content onto a page then drag them around to reorder. The block builder offers publishers a variety of page

elements to choose from, including multimedia and rich link embedding, to create dynamic and visually attractive pages. It also includes a few innovative features too, such as restricting blocks of content to certain audiences, and overall provides an excellent publishing experience.

There is a good workflow process for those needing sign-off before their content can be published. There is no calendar or other way to manage the flow of news however, which we think is a gap at present; Interact says that more features are on the roadmap. Audiences are defined by topics associated with the content, or users can subscribe to topics instead. Permissions can also be applied directly to the content, site, or to where the content will 'live'. Permissions and audiences are created from pre-defined groups from AD or can be manually and dynamically created within Interact. These groups are called 'personas', which can be fine-grained and saved for future purposes.

Interact offers publishers the option to share content beyond the intranet. Email, SMS and push notifications, and posting into MS Teams and Slack are offered as standard, and there is a digital signage solution too (see Scenario 10). A 'newsletter' is among the page templates on offer; using the same targeting features of other pages, it is emailed to audiences as well as being published on the intranet. Additionally, admins can allow individuals to share approved content into personal social media channels. Coming soon is a way to promote Interact content into ServiceNow.

To help with crisis communications, admins may send a 'Broadcast' via email or SMS. Alternatively, a dedicated banner can be added above the top menu or a 'blocking



notification' can be created that stops user access to the intranet until they have acknowledged it. Broadcasts are easy to create, via simple templates or the option to create a more complex page from scratch. It's then simple to configure and dynamically target the broadcast.

## 4. Community and engagement

score 4

Interact has very good in-built community and engagement features. Firstly, users can like, comment on (text only, but including emojis), and share content (as long as admins allow them to). These features work well but we would like to see a range of reactions introduced, to reflect modern experiences on social media platforms. Social activities are primarily done through forums, where users can post a discussion topic, ask a question, or share an idea.

Forum posts, comments, and other user interactions can be managed via a moderation dashboard. This is a simple feature, but we can see how valuable it would be for busy teams.

Collaboration takes place in 'communities', which are private, member-only sites (that are open or closed to new members searching for them). These contain documents, calendars, etc. for a project or team. An Interact extranet can also be created for broader collaborative working or communication, such as supporting retired colleagues.

Blogging is another way to share ideas, best practice, or opinions. The options to create blogs are simpler than news creation but still generate attractive pages, even when created on mobile. Polls can be added to widgets or individual pages to gather opinions, and more in-depth pulse surveys can also be created, shared, and monitored. The questions from pulse surveys take over the whole screen for users, which make them unsuitable for longer surveys, but the questions can be 'postponed' a few times so the user can bypass it for a while.

Users have a configurable number of points to give colleagues as 'recognition', where the points and associated message display on the colleague's profile page and dedicated widget. Badges can be configured to show what recognition people have received, which display on profile pages. We liked this feature but felt it was very simple, so has potential to be developed (for example, so that clicking on a badge explained more about it).

The range of features is good and the functionality behind each is generally very strong. There is a variation in interface and user experience between different tools however (particularly for admins), which we would like to see addressed.



#### 5. Information finding and knowledge management

SCORE

Like the broader platform, Interact's search is packed with features and works well overall. There is a single type-ahead search box across the whole site. All content is indexed, including content of attached documents and PDFs, and results are displayed with thumbnails. There is no search assistance, such as spelling correction, but content can be filtered, and filters will only appear where there are relevant results. Results are returned in tabs of content repositories, such as 'intranet' and 'SharePoint'.

'Best bets' are Interact's version of promoted results, which highlight relevant content when a search is performed. These are simple to maintain, even across multiple languages. The results page can't be configured beyond best bets and 'likely answers' (such as showing the first paragraph of a policy page) isn't included, although there is the option to add metadata as keywords to pages. Users can provide feedback when they don't find what they are looking for though, which will help with search management. We like that the block builder automatically generates page summaries for publishers who are unsure what to write, these are important as they help people tell the difference between similarly titled content in search results.

Users can find colleagues through the main search, or via a dedicated people directory. There aren't any variant suggestions (Jon / John), but users can be searched by and filtered based on information provided in their profile. Profile pages are attractive, showing someone's badges and blogs among other information. There is a basic org chart that expands to show managers and direct reports.

The block builder (see Scenario 3) provides a variety of ways to present complex information, such as through accordion formatting. Additionally, document libraries can be built using an A-Z of pages / document uploads with a local search. We like that content has a quality score to help indicate how findable it is to the author, so that a long title could be cut down for example. Page settings include classifications (such as a 'template' or 'report') and a confidentiality rating (like 'internal only' or 'restricted') - both of these influence search filters, can be surfaced in widgets, and audiences may be built around them.

### 6. Admin experience and governance

SCORE

Home and landing page design is simple, with an extensive range of widgets that can be easily moved or configured. Please see the Highlights for details. However, templates aren't supplied across landing pages, so users would have to rely on governance if consistency was a concern (see Scenario 3 for content templates). The five levels of permissions are flexible, one of which is applied site-wide (intranet power user), and the others are applied granularly

per area of the intranet or to individuals / groups / personas. There is no site request or workflow process for creating new spaces or categories.

Content life cycle is managed through publication, expiry, and review dates. Publishers find all content they have permissions for via their profile; each line in the table has an icon for further information, such as when it was last edited and the version number. Helpfully, editors can bulk edit content via this table, such as substituting inactive authors or changing review dates. There is a filter to show inactive content, but anything due to expire also generates



notifications to authors and displays a warning on the associated page.

Users can manually choose their preferred language, or it will be pulled from profile data, which will update the interface (which is editable by admins) and display content appropriately. Authors may add pages in their chosen language or use Azure to translate during creation, which can then be edited by those who speak the language. Interact helps to track translated content, which is displayed by a 'translations' count in page management screens. If the original page is edited, the publisher can simply press a button for the language they'd like the page translated into. This replaces previous versions with no broken links, as the original and translation are connected. Forum posts and comments are machine translatable on-the-fly.

Understandably, tools for publishers are easier to access than those for site admins. However, we like that it's possible to add all admin tools into the top menu if wanted and it's helpful that admin functions are returned in search. There is explanatory text surrounding menu options, which helps act as a prompt but also makes some screens feel busy. Finally, we have noticed a growing variation in UX between newer and older publisher / admin screens, which we feel needs addressing. Interact have begun to tackle some of these areas and others are on the roadmap.

## 7. Analytics

SCORE /

Interact comes with a range of adoption and content analytics reports that allow admins to measure the effectiveness of their site. Analytics cover information about general site usage, content performance, profile information, content quality and much more. The analytics are available as tables and charts, and all data is exportable. The addition of reports about overall content areas, plus pre-built filters for timeframe (rather than just a

date picker) would be a welcome addition. However, 'dimension comparisons' can be applied to charts, for example a chart with daily views could be overlaid with the number of 'likes' on content across the site. Where wanted, customers may use PowerBI or a similar tool to explore the data further. Interact also offer Advanced Analytics, where customers may take data from a private data lake into a BI tool to manipulate the data as desired.

Mandatory reads can be applied to any page and the returned results are good. Search analytics are also strong and include data on popular search terms, pages without keywords, best bet performance, and searches with zero results. User reported 'failure to find' results and feedback is also available here, which is an unusual feature and very helpful.

Each page has its own analytics, which has been influenced by marketing analytics suites. For example, data includes information such as how people arrived at the page (please see the Highlights for more). This is a great first step for comms colleagues, but we'd like to see additional features such as analytics surrounding campaigns (made up of multiple news articles for example) or A/B testing. Interact say that some of this is on the roadmap. There is data for forums, blogs, and profile analytics, and Interact says that analytics for communities is also on the roadmap.

The presentation of analytics is mostly consistent, with site-wide reports accessible via admin screens and page-level data via the page itself. However, pulse survey results are returned separately and include analytics such as sentiment analysis which isn't available for other intranet analytics. Overall, Interact's analytics work well but there is opportunity to evolve them yet further, which is an observation that we've heard echoed from customers.



## 8. Digital workplace integrations

2.5+

Interact approaches integrations in a few different ways. Primarily content is pulled into widgets for users to interact with, which includes attractive Twitter and Instagram feed widgets. As another example, in a ServiceNow integration users can create tickets and view the latest status of any that have been submitted, although clicking on the case will take a user out of the intranet. Notifications from systems, such as Concur and Workday, feed

into intranet notifications too.

Links out to key systems can be added to the persistent left-hand menu and admins may label these as action-driven links, such as 'book time off', instead of by the tool's name. The marketplace of connections includes Zendesk, Trello and Slack, to name a few. Embed codes can be taken from any video source and added to pages as part of content creation. Lastly, profile badges can be fed via API from a LMS or similar solution, to show qualified first aiders for example.

Interact also offers the opportunity for developers to create custom integrations through an open API and a developer support site, which looked comprehensive although we haven't tested it. Interact says that customers have used this to bring other tools into Interact, or to take Interact tools elsewhere. Interact say they are also happy to discuss additional integration needs with clients and develop solutions where possible.

Box and Google Drive can serve as the source of a document library. Admins can select the relevant folder of contents to then be displayed as a document library within the intranet structure. Users can like, share, and comment, and any changes to the original document will be reflected on the intranet after a short delay. Documents from these libraries can't be attached to pages, so anything that's needed as an attachment would have to be uploaded as a separate copy rather than linked to the source file.

Content stored in Box and Google Drive is then federated as part of the search. Results are displayed in source tabs, allowing users to make the distinction (where they are aware of one). Interact says there is no 'all' tab as information from integrated solutions varies so filters would be inconsistent. Content from other integrated systems is not federated, however Interact's search API would allow for further integration where wanted.

## 9. Microsoft 365 integration

SCORE 3.5

Interact offers a good range and depth of Microsoft integrations, particularly for an independent intranet that doesn't have SharePoint in its foundations. The UX is consistent with the rest of the intranet and so users won't necessarily realise they're using a different tool.

SharePoint integrations work in the same way as covered in Scenario 8 with Box and Google Drive, although usefully there's no need for users to have

a SharePoint license in order to view the content in Interact. When a user views a file from SharePoint they see a document embedded in a page, with all relevant Interact page features included. SharePoint news, however, cannot be brought across into Interact, but SharePoint (and OneDrive) content search queries are federated and returned on a separate results tab.



An Interact intranet can be accessed via the MS Teams left-hand menu, which allows users to access all content and functionality from there. There is a widget to display a feed of latest activities in Teams channels, which users can respond to, and another that shows a list of available teams. MS Teams chats can be started from profile fields and links to intranet content posted into MS Teams channels. However, no notifications are passed into the intranet and no membership information is available, although Interact has said that it will develop this if wanted by customers.

There is a widget to embed Yammer, which users can fully interact with without leaving the intranet. Interact says its own social features are often used instead of Yammer, however. There are widgets that display Outlook calendars, emails, To Do tasks, and results from PowerBI for users to interact with too. Stream videos display in widgets using an iframe or HTML code; within pages publishers can embed Stream videos, alongside YouTube and similar, by pasting the URL into the video block. Delve's content and interface can be displayed in a widget. Interact currently has no plans to integrate with Microsoft Viva.

#### 10. Wildcard

score 4.5

In Scenario 3 we mentioned the need to reach people outside of traditional channels and devices. Digital signage is one channel that's becoming more common in intranets and Interact has a solution that we feel is simple but effective.

Customers may use a data stick in the HDMI port, or a simple URL for the TV's browser to point at. Whatever the approach, the device must be assigned into an Interact channel, for example 'Oxford Street - Floor 1'. Channels and devices include offline caching, so if a TV loses connectivity it will display what was last stored. We particularly like this, as it avoids the embarrassment of a blank screen or one showing an error message. A broadcast (see Scenario 3) can continuously scroll across the screen (like a news ticker) and the time, weather, and stock prices displayed.

Admins can choose to surface content that's already on the intranet or create new content specifically for the digital signage channel, both approaches include a title, summary and QR code. This means that customer-facing content could be displayed in reception areas, or employee-facing content could be displayed in canteens. Branding and sub-branding is supported, as are multi-language needs. Videos play at full-screen, only closing once the whole thing has been shown.

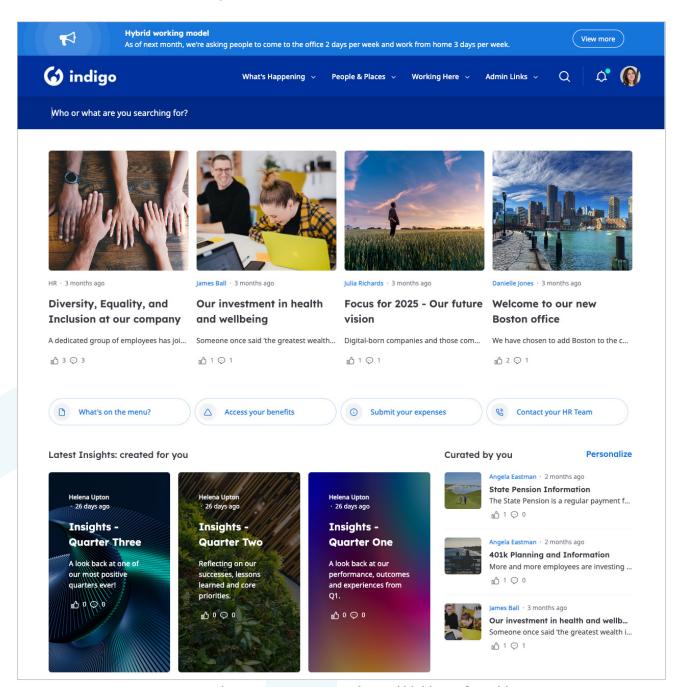
We really like this feature and can see the benefit it would bring to those businesses that need it. We particularly like that this allows communicators to easily manage communications across very different channels, but potentially with one source of content. This will save time, as well as improve communication routes with deskless employees who may not be able to use their personal devices for work.



# **PRODUCT HIGHLIGHTS**

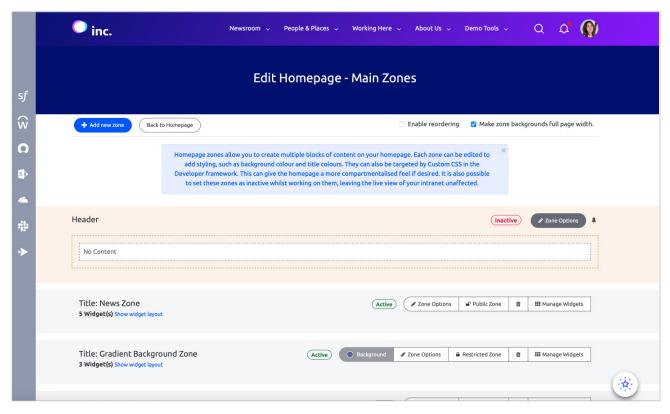
## Home and landing pages

The home page is split into zones, which can be open to everyone or restricted based on permissions or targeting. Interact intranets may have multiple home pages that can look entirely different from each other, depending on the audience targeted. For example, an office-based user could have a 'canteen menu' widget on the home page while a factory-based user could have 'H&S forms' as a link widget instead.

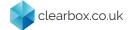


Interact home pages are attractive and highly configurable.



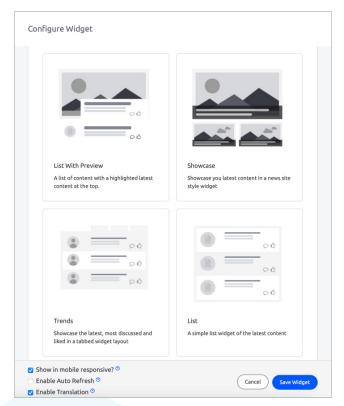


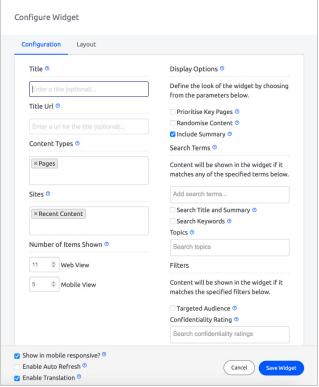
Behind the scenes home pages are split into configurable and targeted zones.



Note that landing pages aren't split into zones (and permissions are applied on the menu level only), but the rest of the process is consistent with the home page. There is a large range of 'widgets', Interact's web part equivalent, for admins to choose from including an activity thread, content aggregation, Trello boards, and a Twitter feed. Each widget can then be configured in several ways, depending on its type, via tick boxes and other simple approaches. Each widget has an option whether to feature on mobile or not and how near the top of the mobile home page it should appear. Configuration also includes layout choices, which for news articles could mean a single hero, or a simple list (to name just two).

The final result is a home page or landing page that has been configured to admin and user requirements. This approach to creating home and landing pages also means that these areas can easily be kept fresh, or that admins can respond quickly to user feedback or new business needs.





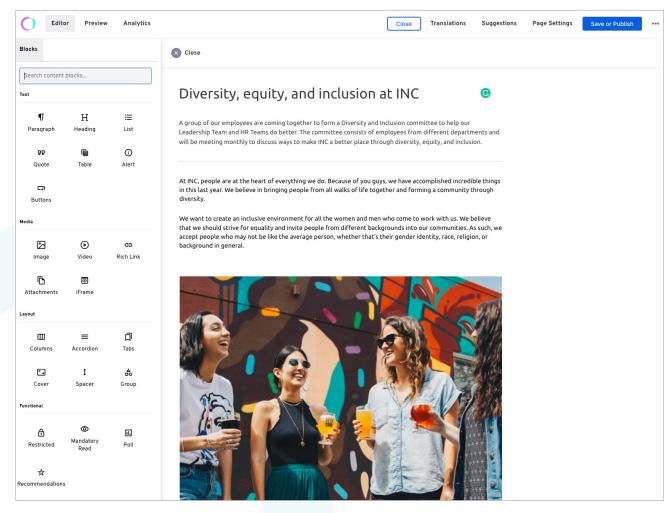
Widgets can be configured in lots of ways.

## **Creating pages**

When adding a new page, selecting 'Build' opens a page creator that utilises the home page approach of zones and drag-and-drop. We like the simple tour that starts for new publishers so they can familiarise themselves with the block builder. Starting with a template where wanted, publishers drag and drop blocks from a left-hand menu onto the page, which they can then configure to display desired content. Blocks include video drawn from YouTube or Kaltura, polls, tables, quotes, accordions, and images (from a central repository or via an Unsplash integration).

There are some innovative features that are worth highlighting here. First, there is a 'check accessibility' feature to make sure that the look of the page hasn't overridden any accessibility needs. Second, publishers can save a page as a template so they can create a series of consistent posts. Next, the builder will check whether the page, or one like it, already exists to help publishers with their publishing or title choices. There's also the option of a 'restricted' block that will only be visible to selected groups, for example an action for managers could be hidden from all other users.

Lastly, the page builder will analyse the language used and highlight 'negative sentiment' or detect 'uninclusive language' (such as 'guys' instead of 'folk'). Interact refer to this as an 'inclusivity checker', which helps authors curate content using positive and progressive language. The result is a visually striking page that has been created using very simple tools. A similar checker, that will assess language choices when compared to company tone of voice, is on the roadmap.



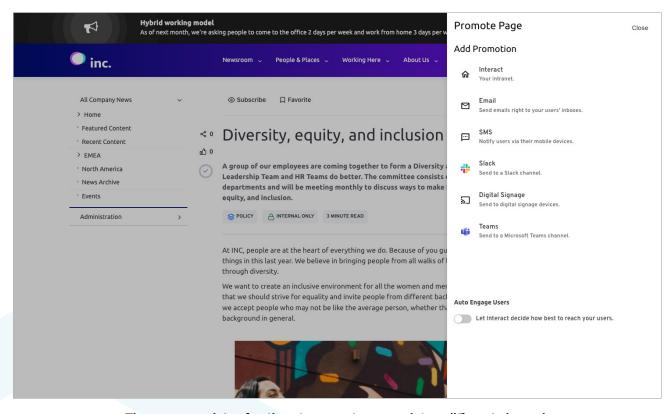
Creating visually attractive content in Interact is simple in the new editor.



Audience targeting and permissions are applied directly to the content, site, or to the site's category where the content will 'live'. These permissions can be controlled by pre-defined groups from AD / equivalent or created within Interact. These groups are called 'personas' and can be fine-grained, such as "shop managers, based in the US, who have only been in the business for six months".

The 'category' will position the page in the right place, and the permissions or targeting associated with the category will make sure the right people see it. 'Manage translations' creates a copy of the content, using Azure to translate, which the author may then amend; this is then saved separately and will be targeted to those who select the relevant language. When the original is updated, the publisher can easily re-translate the page (protecting any links on other pages as the original and translation are connected) then make any necessary tweaks.

'Page settings' adds best bets, confidentiality ratings, classification, as well as keywords. Topics can be added, which users subscribe to or are associated with to help refine which content they see, or widgets can be set up to draw through only certain topics. For example, a retailer could post seasonal information across the site with the 'Christmas' topic that would collate together in one place.

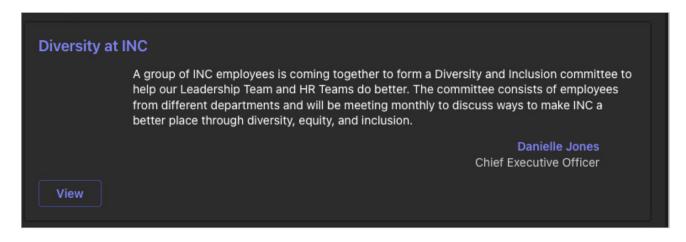


There are a variety of options to promote a page into a different channel.



Future publication dates and times can be set, along with expiry and review dates. Authors can post on behalf of someone else, allowing even the busiest managers to have a presence on the site. 'Authors' must have their content approved to publish and can leave comments for the approver.

Publishers can decide whether to distribute outside of the intranet, such as into email inboxes, in MS Teams or Slack channels, SMS, or into digital signage. Posts into Slack or MS Teams share a link back to the intranet and are posted from 'intranet name'. Posting in channels can be scheduled as required. Finally, admins can choose to switch on employee advocacy features that allow people to share posts into their personal social media channels. This will create a 'public facing' version of the page for external people to access, which is stored separately from the intranet.

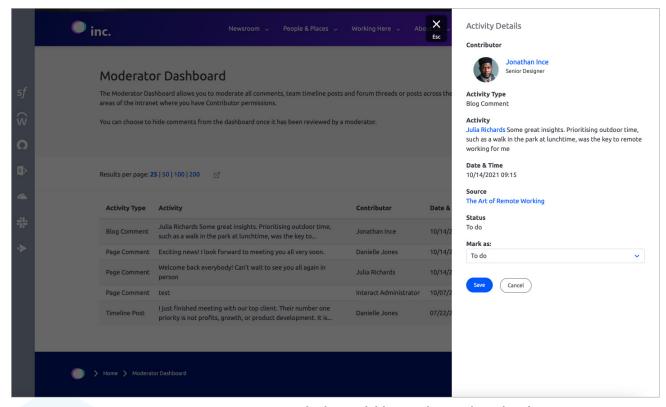


Posts into external channels can be configured and will direct people back to the original article for more.



## Admin and publisher tools

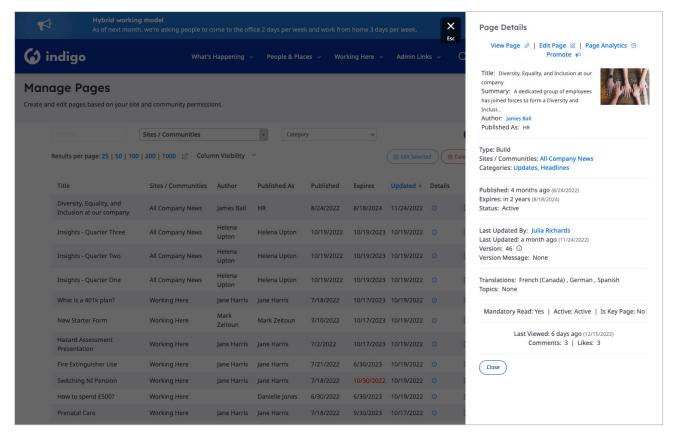
Alongside the home page and block builder experience, there are some unusual admin tools that we wanted to commend. First, for those users who manage a forum, or have contributed content that has been commented on, all activity is collated in a moderator dashboard. This is found via the user profile icon in the top menu and opens a simple list of activity type, activity summary, who posted, and the date and time of the post. The moderator can open further details from this screen, where they can mark any action as 'to do', 'in progress', or 'done'. Once complete, the activity is hidden from the dashboard. This is a simple feature, but we can see how valuable it would be for busy teams.



Forum posts, comments, and other activities can be monitored and managed by admins in a personalised moderator dashboard.



Everyone with permission has access to a 'manage pages' screen via their profile, which lists all pages they have access to edit. This table is sortable and filterable, making it easy to find content that requires attention. Helpfully bulk changes can be applied here, such as changing authors and review dates. Additionally, all pages have a 'details' pop out that summarises its position in the intranet, categories, and number of translations. From here there's an option to edit, promote, and view its analytics. There's also a version history, which can include comments from anyone who has made amendments, and these versions can be rolled back if wanted.

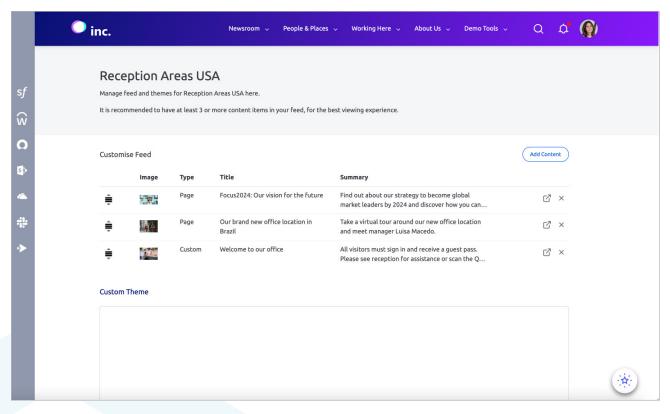


Publishers are able to easily see all their published pages, as well as the overview of a page's status and history, then make changes.



Lastly, we wanted to highlight the ease of managing digital signage in admin screens. A device must be assigned into an Interact channel, for example 'Oxford Street - Floor 1' or 'Paris Factory'. Channels can surface content that's already on the intranet or admins create new content specifically for the digital signage channel. This means that customer-facing content could be specially created for display in reception areas. Alternatively, a video from the CEO could be surfaced as employee-facing content to be displayed in a factory canteen. Even if these digital signs physically exist in the same location, the channel approach allows admins to tailor content by device.

The header can be configured to show date, time and / or weather (in Fahrenheit or Celsius) for the screen's location. A broadcast (see Scenario 3) can continuously scroll across the bottom of the page (like a news ticker), along with stock price if wanted. Content pages will flick through at a leisurely speed, giving people plenty of time to read. Videos will play at full-screen and will only close once the video is complete. Where desired, QR codes can be added to a page that will take the user to the intranet. Impressively, all of this functionality is controlled via a simple dashboard.

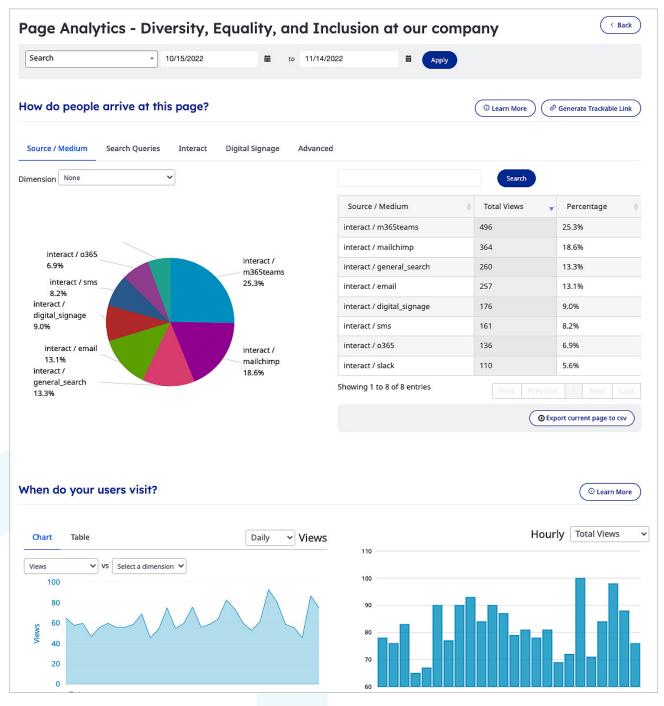


All digital signage is controlled in a simple admin screen.



## **Analytics suite**

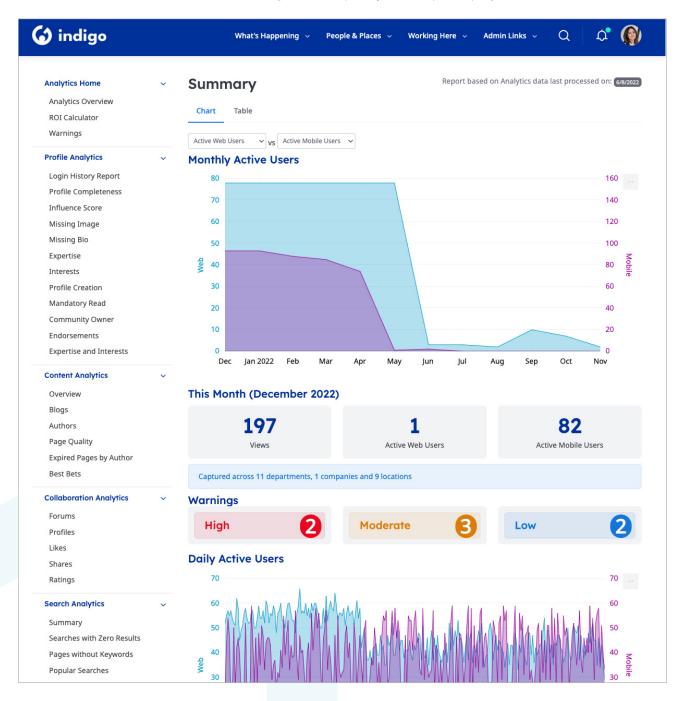
Interact offers an impressive range of analytics. Each page has its own dashboard of results, which summarises how and when people access a page. This includes data around the search methods people used to reach the page, as well whether people have engaged via email or by scanning a QR code in digital signage. The charts are simple but we like that data can be overlaid, such as views vs likes, so publishers can interrogate further to uncover the answers to questions they have.



Each page includes a good range of data.

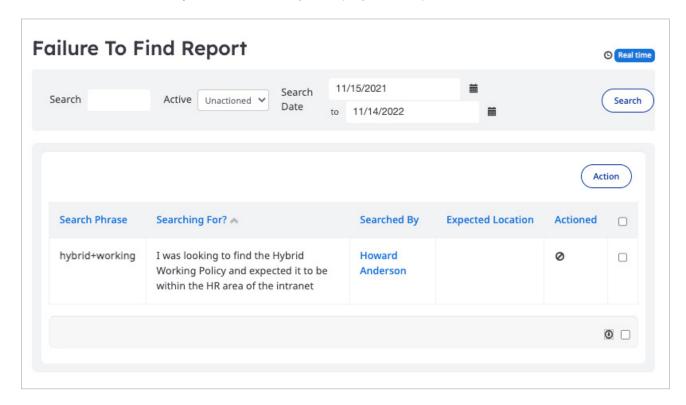


For more information about the overall performance of the intranet, admins have access to a large and comprehensive range of reports. These are presented as charts and tables, depending on the information included. Some of these include comparison values, allowing admins to alter what's being presented and compared so that they can interrogate information further. We particularly like the analytics landing page that includes an overview of monthly active users, as well as content warnings about quality and expired pages.



Interact's analytics include a range of charts that can show comparable fields, like 'views' and 'likes'.

For some reports a simple table approach provides a good level of detail. For example, many of the reports on search are presented as tables so that admins can see individual search terms. When users choose to report 'failure to find' (where they can't find something based on the terms they're entering) or where a search term returns zero results, it's helpful for admins to see this level of detail so they can make changes to pages to improve search.



The search related reports in Interact are very strong.



# THINGS TO BEAR IN MIND

Interact has been in the intranet marketplace for a very long time, and this shows in the quality and range of features in the product. However, this also means that some back-end features and admin UX haven't changed for some time. The introduction of the block builder is a good first-step to address this but makes older tools, such as the form builder, stand out as needing work. This means there is a growing divide opening between user and admin functionality that we feel needs to be addressed and made consistent. It is a powerful product, but more could be done with the UI to make improvements.

Finally, Interact has many sophisticated features and it will meet the needs of a range of organisations. However, customer feedback and our own observations suggest that Interact could benefit from a narrower approach to evolving the product in future. While a broad range of features is good, there is some existing functionality that would benefit from development as well as long-standing gaps that could be filled (such as management of the flow of news). By focusing on a smaller range of higher priority features we think Interact would be elevated yet further, as well as meet the needs highlighted by customer feedback.

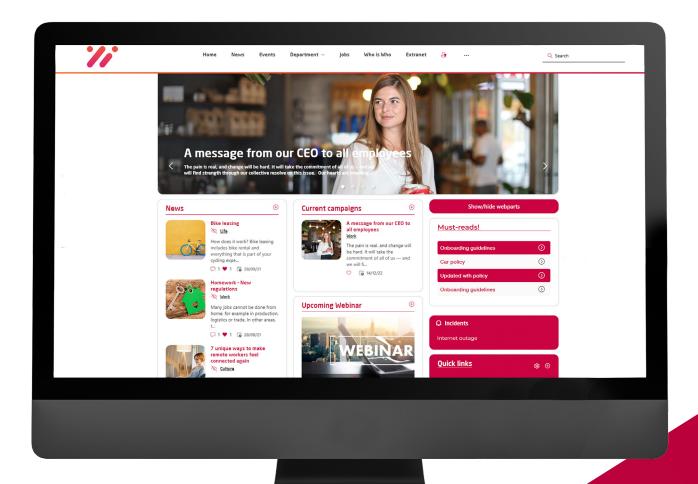
Finally, please note that while it's in the higher price bracket there are a number of optional modules included in the pricing provided to us. Where features aren't needed, such as the digital signage solution, businesses will see a significant drop in cost.

# Why choose this product

Interact is a fully featured product, where the years of experience from the vendor is evident. Businesses of all shapes and sizes will appreciate its flexible approach to content creation and presentation, which will meet the needs of end users and admins alike. The new block builder reflects the focus on communication features, making Interact a tool that internal communication professionals will value. Overall, we think it is a strong intranet product that is worth further exploration.







# Our view in one tweet

@Involv\_intranet brings smart features to SharePoint intranets that will save you time and delight your users.



# Involv Intranet owned by Cognit BV

Involv is a SharePoint intranet in-a-box product that was launched in 2017. It is supplied by Cognit BV which was founded in 2007 and is based in Brussels, Belgium. Cognit has a lot of Microsoft and SharePoint industry experience and has used this to good effect to build on the core capabilities of the Microsoft 365 suite.

Content publishing is an enhanced version of standard SharePoint. adding some useful templates and content types backed up by easyto-use targeting and publishing controls. Involv adds good support for notifications, crisis communications and mandatory reads too. The mobile app brings much of the desktop experience to mobile and even adds to it with a simple way to publish content from your device. Search is behind many of the content publishing components and provides a highly configurable experience for finding information. Knowledge management is also well served with templates for FAQs and a dedicated knowledge base. Analytics

has been beefed up in the latest version to provide a valuable suite of dashboards, too.

Social community capabilities are standard Microsoft although Involv does add the ability to report offensive comments. Social communities and chat are absent from the app, however. Support for integration with Microsoft 365 is strong, as you would expect, and there are some integrations with third-party products, but big names like Workday and ServiceNow are missing from the standard offering.

Overall, Involv offers a very capable SharePoint intranet-in-box solution at an attractive price-point for those businesses that may not have the time, budget or resources to do SharePoint development work in-house. Due to the reasonable price and excellent support offered from the vendor, we think Involv will particularly appeal to organisations of all sizes that are looking for a longer-term partnership with their intranet supplier.



# Summary table of scenario scores

#### NO. SCENARIO/SCORE 1 User experience and visual appeal Mobile and frontline support 2 Internal communication 3 Community and engagement 4 5 Information finding and knowledge management 6 Admin experience and governance **Analytics** 7 Digital workplace integrations 8 Microsoft 365 integration 10 Wildcard

#### **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price band based on number of users, One-off payment and ongoing maintenance fee, Subscription - price per user per year.

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, multi-year commitments.

Price includes: Customer success services, maintenance, product support, branding / theming services, updates and upgrades, hosting, access to a community & webinars.

## Key benefits

- Involv makes excellent use of SharePoint lists to build simple but effective features, such as mandatory reads, ideation, and job vacancies.
- Integration with M365 is strong and 'My Page' makes good use of the Graph API to aggregate personalised information from Teams, Outlook, OneDrive, To Do and Planner.
- The Analytics Centre provides a useful set of dashboards that keep tabs on content and traffic, including mobile usage.
- A welcome tour and contextual tutorials will help with adoption and effective use by employees and admins alike.
- Involv is one of the lower priced offerings in the report and as such represents excellent value for money.

## Improvements and considerations

- Clients will be reliant on the vendor to configure or make changes to some aspects of the product, such as search and the mobile app, but Cognit are well-rated by customers so this should not be too much of a problem.
- Content editing uses the standard SharePoint experience with some welcome and useful
  enhancements. However, editors still have the freedom to use a wide range of fonts and styles that
  some organisations might want to have more control over.
- The mobile app has been improved since our last review but does not include social community or chat features, apart from commenting on published news.





## **Product type**



# **Branding opportunities**

All branding, complex options

#### Target businesses



**SMALL** less than 1,000 people



MEDIUM

1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

#### Base systems



Fully standalone



Requires SharePoint



Optionally works with SharePoint



Other

## **Sectors**



Healthcare



Charity and voluntary work



Accountancy, banking and finance



Property and construction



Science and pharmaceuticals

You may also be interested in...









# **COMPANY AND PRODUCT**

## Company details



Company Cognit BV



Company founded 2007



**Company locations**Brussels, Belgium (HQ), UK



ISO 27001 certified



Typical client size
100 - 20,000+ employees



Largest deployment so far

20,000 employees and 15 countries



#### Partner locations

UK, Germany, France, The Netherlands, Austria, Switzerland



#### Customers

Please <u>see their website</u> for details.

## Product and technical details

Name of product	Involv Intranet
Product launched	2017
Current version	3.5
Accessibility	WCAG 2.1 compliant





#### Deployment

Client onpremises

Client private cloud

Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant

Other

#### Data residency

N/A

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active Directory

**ADFS** 

Open ID

Oauth

G Suite

Other

#### Search technology

Apache Lucene/ Solr Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

#### Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other\*

\* Zenya

#### SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

## Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other



#### Reverse-out options

Data remains on the client's Microsoft 365 tenant.

#### Languages supported

English, French, Polish, Dutch, Italian, Spanish, German for administration and configuration plus every supported language in Microsoft 365 can be built in. For the end-user every language is available through configuration, Cognit have already done Chinese, Japanese, Flemish, Czech and many more.

#### Machine translation

Yes - via the product

#### Right to left script

Yes

#### Set-up and support

#### Set-up process for new clients

Automated remote installation for the product. Project roll-out and workshops, configuration, training, hyper-care, and go-live services are offered through 'Success Packages'.

#### Product updates

Quarterly for main updates. Hotfixes are offered in between if needed.

#### Product update process

Customers choose if they want to receive updates automatically or on a different timing. Customers are always notified up-front on the availability of an update. Updates are done with a one-click remote installation.

#### Technical support

Involv provides assistance through a helpdesk in the CET / CEST time zone. Although located in Western Europe, support can be offered outside office hours for global customers. At additional pricing they offer extra SLA or a 24-hour helpdesk (Monday to Sunday). If a customer has bought a license through a partner, then the partner takes care of all the technical support.

#### User community

There is an online community where customers can post questions, share best practices and ideas.



#### In their own words

Cognit says: "Involv is an intranet & communication platform built on Microsoft 365. It offers a solution to reach everyone within your company and increase collaboration with an intuitive and user-friendly interface. Our team provides a stress-free implementation supporting you from installation to go-live."

## Their view of the marketplace

Cognit says: "Having trouble reaching all employees in your organisation? Involv offers a way to connect with all your employees, boost company culture and increase productivity on the work floor. Reach and engage everyone with Involv!"

#### Voice of the customer

Customers praised Involv mainly for the ease of use of various aspects of the product. Of those who were more specific, one highlighted "the usability for the content manager", another added "it doesn't take a lot of time to publish new items" while a third liked the "easy to use drag-and-drop features". Other aspects that came in for mention are "required reading", "ability to personalise the intranet" and "price quality ratio" (this last one referencing the low cost of the product).

In terms of changes customers would like to see, there were a range of responses, but the most common theme related to search improvements with a typical response being simply, "better search". One customer was more specific, saying they would like Cognit to "improve the search function of our news items, so employees can easily look up stuff back in time".

Another customer wanted better image handling asking for, "a solution to the scaling problem with pictures in the banner of a new page" explaining that currently "the height of the banner does not adapt to the picture". Involv's multilingual support is quite capable, but one customer wished for a simplified process around publishing saying they would like, "approval of the same news item in different languages in one click (instead of per language)". As seen above, most customers felt the product is easy to use but one complained about the noticeboard feature saying it "is a little bit too difficult for employees who aren't used to working with Involv".

Respondents were universal in their acclaim for the vendor, variously describing the experience of working with them as, "Very good", "Excellent" and "Superb!". Expanding on this, customers appreciate the reactiveness of the vendor with one typical response being, "they answered and resolved issues and questions in a quick and professional manner". Another described Involv as, "great professionals who know all ins & outs about SharePoint and who talk non-IT language". One happy customer concluded, "it was like having our own in-house development team".



351

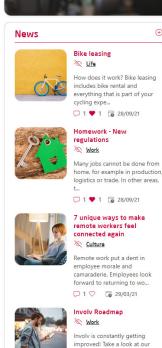
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News

lobs

2









A message from our CEO to all employees Work

The pain is real, and change will be hard. It will take the commitment of all of us — and we will fi...

♥ 14/12/22







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#### Webinar: How to motivate and communicate with employees working from home

Working from home is not easy for everyone. Also for the connection with the organization and the relationship between colleagues, working remotely does not always work as well. However, working remotely doesn't always have to be a stumbling

11/06/20

> Show all webinars



#### Upcoming birthdays



**□** Incidents

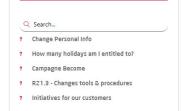
**₩** 

Expenses

Tim Bogemans



📥 17 March Jessica Keen



FAQ

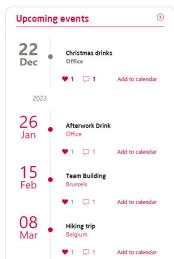
roadmap: JAN Add target

> Show all news

Show more

audience fu... □ 1 ♥ 1 □ 10/03/21

Jobs m IT Senior Developer ☐ HR **Business Consultant** > Show all jobs



#### Yammer

#### Time zones Brussels, Belgium

12:00 Tuesday, 12/13/2022

United Kingdom

11:00 1h behind Tuesday, 12/13/2022

New York, NY

06:00 6h behind Tuesday, 12/13/2022

#### We 💚 our workplace







> Show all events





# **REVIEW**

#### 1. User experience and visual appeal

score 4

Involv adds an attractive layer on top of SharePoint that delivers a clean and easy-to-navigate intranet. The experience is contemporary with common themes for tools, icons, and controls. Nice touches are an easy way for employees to change font sizes and a dark mode switch. On the home page, employees can choose to hide some of the less critical information, such as birthdays. We particularly like the welcome tour of the main features of the

intranet, which is unusual in SharePoint in-a-box products, please see the Highlights for more on this.

Involv has done a lot to improve on the navigation options that come with standard SharePoint. The custom global navigation supports audience targeting and multilingual options. It can be styled as a mega menu with icons and images, or as a simple dropdown menu. At a page level there is a configurable site navigation component that adds a breadcrumb trail and local site navigation menu structure.

Involv has a 'notification centre' where employees configure their own notification preferences, but there is no traditional 'notification bell' or similar. Content authors choose whether and what type of notification to send when they publish a page (see Scenario 3). Notifications can be sent immediately or scheduled. Alternatively, mandatory reads function as a form of notification (see Scenario 7), and an incident pop-up can be created for when users initially log-in. While notifications work well, we think that the addition of a bell icon or similar to collate Involv notifications would be helpful.

A special 'Involv menu' is behind a floating 'i' icon, which reveals options such as content creation or administration. This icon can get a little lost, but it's always in a consistent place and users are likely to quickly understand its importance. Using the Involv menu, admins can change site themes that include logos and colour palettes. Themes can be distinct for different sub-brands, divisions, or regions by creating different instances within the same intranet environment and tenant. Each instance could look different, with targeted components and branding. Involv ships with a number of 'skins' which are predefined sets of custom styling that change things like rounded corners. These add a fair bit of variety to the default look of Involv and provide a good starting point for organisations to achieve the look they want.



#### 2. Mobile and frontline support

# SCORE 2.5+

Mobile access to Involv is supported via responsive web and a native mobile app for Android and iOS. The native app offers the added benefit of push notifications and custom app branding (white labelling) for organisations with MDM / MAM. To access the app, all users must have a M365 license and log-in with those credentials, although Cognit are exploring alternative options for frontline workers. There is no support for biometric authentication.

The app has familiar primary navigation buttons at the bottom of the screen and vertical scrolling for content. The design and branding within the app are inherited from the desktop for a consistent experience, plus all content and features are available. Some areas, such as news articles, are mobile responsive content 'wrapped' by the app, but we don't see a problem with this approach as it means mobile users get the same features as desktop. Multilingual support is included, and content and people search are also available.

One dedicated frontline worker feature is included to encourage contributions from the field. The 'News Board' has been created specifically for non-desk workers to quickly add simple news stories to the intranet. The creation page has a title, body and supports one or many pictures. The template can have pre-defined metadata so it can be shown in its own news channel on desktop and mobile. Frontline specific content or PowerApps can be linked from the 'more apps' menu if needed.

Configuration of the app and whether features / content types are included or not is all handled by Cognit rather than the client. Some clients may find this arrangement a bit restrictive, but it will probably work for most organisations to decide the setup and not need to change it too often. The primary and secondary navigation items are fully configurable to client needs. There is a 'hot topics' feed that is only available on mobile and Cognit will configure filters to change what content is shown here per customer.

Overall, the app works well for different user types. Frontline teams will appreciate being able to share their own news with colleagues and easily find key documents, while desk-based teams will appreciate the consistency of content and mobile optimised experience. Please see the Highlights for more.

#### 3. Internal communication

SCORE 3.5

Involv does a good job of using SharePoint's standard content creation features but introduces additional tools to help communicators. The page creation process is easy and consistent, regardless of the type of content being built. Publishers enter basic article information (such as publication dates), as well as select what metadata to apply (such as company categories or department, see Scenario 5) and then select the audience based on AD Groups. There is no

support for dynamic, rules based audiences.

Publishers choose from a nice selection of page templates, configured by admins, or start from scratch. The page is then built from mainly standard SharePoint components, but Involv offers some others too, such as a call to action and a document properties component. Cognit can easily configure a default approval workflow, which is sent via email. On publication it takes a few



minutes for the article to appear in a component, as search technology is used to display content.

Publishers choose when to promote content to users, which is completed via the 'notification centre'. Publishers select which channels they wish to notify (Windows desktop, email, Teams and mobile) and which audiences should receive it. The history of notifications is tracked separately, so that admins can see how many people received a message and when. Home and other landing pages present news feeds to users, or users can view all articles in a news centre. Where components consolidate news from across the site, users can choose to hide categories or departments.

For crisis or urgent communications, Involv uses 'incidents' that pop-up on a page and / or display in a dedicated home page component for desktop and mobile. These support audience targeting and multilingual content as well. A simple 'publishing calendar' shows when news articles and incidents will be visible from and to when.

There are some available options for reaching people outside of Involv. Organisations may choose to use SharePoint's email digest builder and Involv has a digital signage solution too (please see the Highlights for details). These solutions are simple compared with other products in the report but are still helpful.

#### 4. Community and engagement

3.5+

Involv uses a number of standard SharePoint features for community and engagement (see Scenario 9 for details), but also works well with SharePoint to introduce some nice tools of its own. Yammer can be integrated into components to show individual communities or a person's entire feed. Involv uses SharePoint likes and comments, while adding the ability for comments to be reported for review and action where necessary.

Microsoft Forms and SharePoint's Forms components embed polls and surveys on an Involv page. A 'feedback' button in news stories makes use of a MS Form for employees to provide more structured feedback on a particular page or feature. Involv says that customers use the mobile 'News Board' feature for an employee marketplace or classified ads as well.

Involv makes good use of SharePoint lists and pages to create different types of content. For example, users write blogs using a SharePoint page with a simplified template, where an approval process can be added if wanted. However, users would still have to write their blog content using SharePoint's content management system, which some may find complicated. The content of the template and associated training would need to be carefully considered.

An ideation feature includes an 'ideas pool' of pages, which can be filtered and sorted to show newer or most liked ideas. Employees can submit ideas anonymously, if desired, and then a workflow can be configured that adjusts the status from 'created' to 'discovered' based on the number of likes or comments it has gathered. All ideas are stored in a SharePoint list, which admins monitor to pass on ideas that are gaining popularity.

There are no dedicated onboarding features but it's possible to use mandatory reads / incidents to support the onboarding process. There are some simple components to build a sense of community, such as events management, a birthdays web part and a people finder component that can be randomised to show different people on each page reload. Company service milestones can also be celebrated automatically if hire dates are included in employee profiles. Finally, pages and lists can also be used for 'job boards' that offers a basic career development tool for users and HR managers.



## 5. Information finding and knowledge management

score 4

Involv uses SharePoint search, and Cognit offer some nice configuration options. Organisations can choose whether to include only intranet content or content across O365 sites (where the content of documents in each is indexed). A search icon in the top menu offers type-ahead quick results, while an 'advanced search' button takes the user through to a more detailed results screen. Filtering on refiners, such as department or author, is

included and admins can configure these where wanted, along with the way the results page presents information. Local search bars can be added to content areas and various components use search to present grouped content to users.

There is no 'promoted results' facility as such but Involv offers a couple of ways for clients to tweak search results. The first is 'search boost' page metadata that allows authors to add keywords that will raise the result ranking in search. The second is a centralised synonym list in the admin centre that the search engine refers to when returning results. Whether or not these synonyms are used is easily configured via a switch in the search web part, so you could have a search that includes synonyms, and one that does not.

People search and configuration works very well in Involv. The directory results page is configurable, with refiners based on profile data, and admins can choose additional profile fields. Where wanted, employees can update their own profiles and all profile fields are indexed during search. Employee profiles show the presence indicator, contact and profile information, and an org chart. Profile information, such as skills, is not hyperlinked by default but Cognit says this would be easy to do.

An org chart web part can be added to any page, then configured to begin with certain employees. The data is from an Active Directory / SharePoint user profile and displays in an attractive tree format that can be explored.

Publishers use the page builder to create complex reference pages, which includes a SharePoint accordion web part. Involv also offers a dedicated knowledge base that provides clickable tile components to refine presented documents. The knowledge base includes a local search and tick-list refiners, plus admins can configure components to return 'popular documents', for example.

## 6. Admin experience and governance

SCORE 3.5

The Involv menu gives access to site administration, content admin, and multi-language options. Administrators have access to different functions based on their permissions and controls are found in SharePoint lists or Microsoft styled control panels. The 'manage site content' admin screen can be configured, so admins get quick access to the tools in use on their site rather than a generic set of features (some of which they may not use).

Global navigation items are managed via a SharePoint list but Involv includes its own UI to simplify and improve the experience. The local site navigation and breadcrumb trail web part is similarly easy to manage. We really like that these web parts can re-use link information from the global navigation list or be maintained separately.



Design of the home page is flexible, making use of Microsoft and Involv components to create pages as desired. The layout and display of components is configurable for user groups, it's also possible to store and use different designs for different audiences.

Involv has good contextual support for content publishers and admins through video tutorials that are embedded in the admin screens for various web parts used across the product. Please see the Highlights for more details.

All content has publish and expiry options, including mandatory reads. Cognit will configure Power Automate to handle workflows around the publishing process, but it would be nice to see some options included as standard. At the time of this review Cognit was working on an 'All Site Content' management screen that will be a benefit to intranet managers wanting a status view across all pages.

Multi-language options are well handled in Involv, where publishers select the language of a new article at the point of creation. Where another language version is needed, publishers can automatically create a copy that is translated into one or all additional site languages using Azure Cognitive Services. These language versions are then checked for accuracy before publishing. Employees select the language version they want to see via an on-page toggle with the default being the language settings in their profile. We particularly like 'InvolvTranslation' where Involv will automatically translate certain terms when a publisher adds them to an article.

## 7. Analytics

score 3.5

Cognit has done a lot of work on analytics since the last review and Involv now ships with a comprehensive range of useful dashboards. Clients can't currently change these themselves but we think most needs are covered and Cognit can make changes or additions if needed. The analytics centre is well laid out and organised, presenting the information for content, search, mandatory reads etc clearly and logically. Involv integrates with Google

Analytics if needed and has a simple integration link with Microsoft Clarity too.

Adoption and usage measurement is comprehensive, showing the top level KPIs for visits, time spent, users etc. along with peak times and days of the week. Mobile usage is shown and broken down by department. It would be nice to see this segmentation available for desktop as well.

The content section KPIs give an overview of how much content of different types there is, including multilingual articles, notifications, and engagements. This is aggregated at site level as well as showing top performing pages. We particularly like the thumbnail views for the top pages alongside their metrics. Tabs make it easy to switch between most views, likes, and comments etc. with the table of information adapting accordingly.

Mandatory reads are implemented in a flexible way that will appeal to customers that want to include content inside and outside of the intranet. Content title, description and URL are added via the Involv admin centre and these documents will appear in a widget on the home page. Clicking the 'read' button shows the content then records the document as being read. In the analytics centre the mandatory reads section shows all these documents, who the audience is and who has read them.

Search analytics reports on the top searched terms and breaks these out by successful and unsuccessful searches. As Involv supports multiple search configurations within the platform, the results also show which of these was used for the search. Unlike the other analytics, there is no chart of 'search terms usage over time' which might be a nice addition, along with some



information about where employees went next after seeing the results.

Involv analytics covers most of the product features in some way. Notifications have their own dashboard, along with reported comments and incidents (crisis comms). Top authors and contributors are also shown. Finally, it's worth adding that all the analytics discussed above can be easily exported to Excel for further manipulation and analysis.

## 8. Digital workplace integrations

SCORE 3+

Cognit has developed some integrations based on requests from existing clients. There are opportunities to develop further integrations though, which will primarily use Power Automate (such as for Jira and Salesforce) but these aren't available out of the box.

Digital Asset Management system, Bynder, can be used as a source of image and video assets within the publishing system. Authors add the Bynder component to a page like any other web part, which allows them to browse content from the Digital Asset Management platform and embed in the page.

There is a read-only integration from CV Warehouse, a jobsite platform. Job vacancies can already be created in Involv, but this integration enables CV Warehouse vacancies to be presented on an intranet page, which inherits the branding from the intranet and creates a more attractive page. To apply for a job, users will be taken to the company's jobsite. Cognit has developed a similar integration for SuccessFactors that pulls in job vacancies and training opportunities. As with CV Warehouse, applying for the job or training opportunity is handled via SuccessFactors.

Cognit has also developed a Microsoft Search connector for Infoland Zenya, a quality management system used in hospitals. Documents in Zenya, Involv and optionally SharePoint (see Scenario 9) are federated and have common refiners. Favourite and recent documents from Zenya are also integrated. All documents can be viewed through a single sign-on, but users are taken out to Zenya to access the content.

Cognit could integrate with Dropbox or similar document storage but would likely simply display content that wouldn't federate in the search. Scenario 3 covers integrations with Slack and digital signage. Finally, people profiles are set-up to automatically contact people via the default systems, which could be configured as Skype, Webex, or Slack for example.

## Microsoft 365 integration

score 4.5

As Involv is a SharePoint intranet in-a-box product, it understandably works very well with Microsoft applications. Any content on SharePoint can be visualised on Involv, whether that's a news post in a news feed component or a document library for a department. 'Followed sites' and 'recent documents' could also be presented on a user's 'My Page', which consolidates activity across M365.

Involv is well integrated with MS Teams, please see the Highlights for details, and can also be integrated into MS Teams through Viva Connections. The downside of the Viva Connections



integration is that it only allows one tenant to be configured, so those with multiple tenants may prefer the MS Teams integration instead.

Content with SharePoint, MS Teams, and OneDrive is federated within Involv's search, which uses the SharePoint search behind the scenes.

Feeds from Yammer can be integrated within Involv components, without any real visibility or people knowing they are using Yammer. For example, an individual's own Yammer feed could be integrated into their My Page, or a community feed could be added to the ideation space for news about implemented ideas. Power Automate could be used to create a post in a Yammer community or MS Teams channel when a news article is created, or incident added in Involv.

For other M365 applications, My Page provides an overview of recent emails and calendar appointments from Outlook, plus projects and tasks from Planner / To Do. Tasks are checkable, bi-directional and link to Outlook as well. Cognit recommend using Microsoft Forms and SharePoint's Microsoft Forms component to embed polls and surveys on an Involv page.

#### 10. Wildcard

SCORE 3+

As mentioned in Scenario 9, Involv is an intranet in-a-box product and so works very well with SharePoint, as you would expect. In this wildcard we wanted to highlight just how well Involv has used SharePoint, particularly lists, to introduce features to its standard offering. While these are simple in approach, they offer a good head-start to those businesses who may not have the time or budget for extensive SharePoint development. In fact, Involv's overall price-point means

that for a small cost, a lot of administrative burden can be removed from an intranet manager while delivering a helpful intranet to end-users.

The first example is 'Incidents' that are created in a SharePoint list and are configured to appear in a dedicated component or in a pop-up that people can't miss. Events, ideation entries, and job board posts are all stored in lists where an admin can change the status and manage any associated activities. 'Glossary' is a good alternative to Viva Topics, which is included in the licensing cost.

Another communication tool is a SharePoint list detailing all published news articles, which can be filtered to provide an overview of content by category or department, or even by expiry date for a later clean-up. A simple ticketing system uses PowerApps as a front-end form, which passes into a SharePoint list for an admin to manage as needed. Mandatory read items are created by admins in a SharePoint list, which display in a home page component that prompts the user to click once they have read the content (whether a news article or policy document). Finally, 'Involv Translation' is used to capture standard translations of common terms across the site, such as 'Upcoming events' or 'Prossimi eventi' in Italian.

Nine features are mentioned above that use SharePoint lists, pages, and pleasant styling to deliver helpful functionality to users. Where wanted, further workflows could be configured to take data into integrated systems or to pass activities along an approval process. These are all simple and there will likely be business systems that can do some of this functionality, but we can see the value for those businesses or intranet admins that need some assistance.

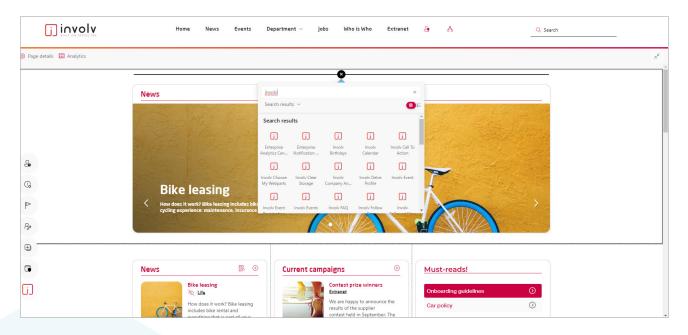


# **PRODUCT HIGHLIGHTS**

## Creating pages and reaching people

Pages are laid out flexibly and attractively, using an extensive range of Microsoft and Involv components, including slider carousels, hero bars, search results for each content type, incidents, mandatory reads, document libraries, calls to action, maps, countdown timers, organisation charts and profiles, calendars, apps and code snippets, images, videos and more. Adding, changing, and moving around sections to construct a particular page layout are all made very easy to do.

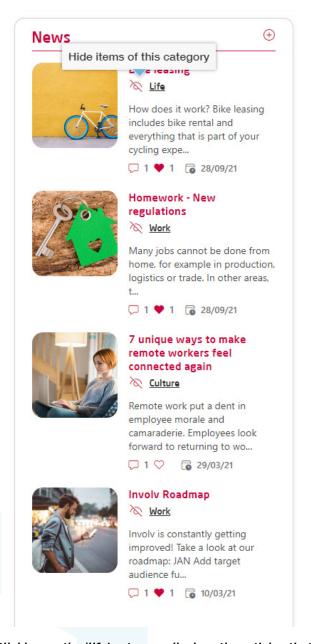
Search-based components can be created around a particular search query and with results ordered as required. Various templates can be applied to present the returned information in different ways.



Selecting an Involv component for a site page.

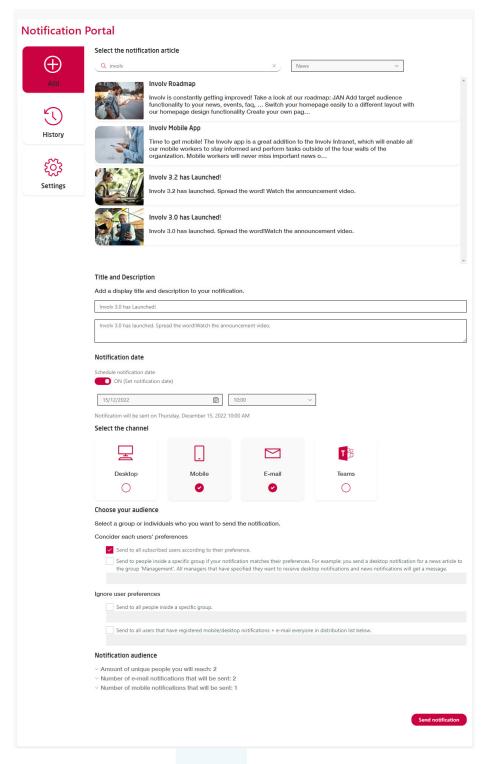


When it comes to news articles and other content pages, users may hide certain categories of news directly in the news component. While some news will always be pushed to them, this gives users some control over what they see by opting out of chosen categories. The categories in news articles are configurable and clickable, which encourages browsing so that people can find news they may have missed. Once clicked, the category opens a simple search results page with all associated articles pre-filtered and sorted by recent article. Users can further refine what's shown in this search results page, where wanted, or browse through what's there.



Clicking on the 'life' category displays the articles that have been tagged with that category, as well as others.

Important news can be highlighted via a slider, which could display on desktop and mobile, or alternatively publishers can issue 'notifications'. Publishers select which device types they wish to notify (from Windows desktop, email, mobile and Teams) and which audiences should receive it. The history of notifications is tracked separately, so that admins can see how many people received a message and when.



Notifications support scheduling, audience and channel targeting.



There are a few options for reaching people outside of the Involv intranet. Organisations may choose to use the standard SharePoint news digest or use Involv's digest builder. Admins select which news stories they wish to include from a simple check list, sorted by most recent stories. The title, description, and other elements of the digest are editable. Admins then send to predefined mailing lists. The digest is more basic than other newsletter tools we've seen but is helpful for a more curated approach to a digest of news.

Involv offers a simple but flexible option for digital signage via InvolvCast, which can be used by anyone for free, even non-Involv customers. The digital signage channel can be configured to show news stories from a specified category, or from a dedicated free-text web part. The free-text web part has to be maintained manually but allows for all text to be displayed on the digital screen. A news feed is automated, but only shows a snippet of the content and a user would have to visit the intranet for more.





# **New training session**

24/1/2023

Join today's training session with Walter as he explains what types of communication exist and how they create an inclusive comms matrix.

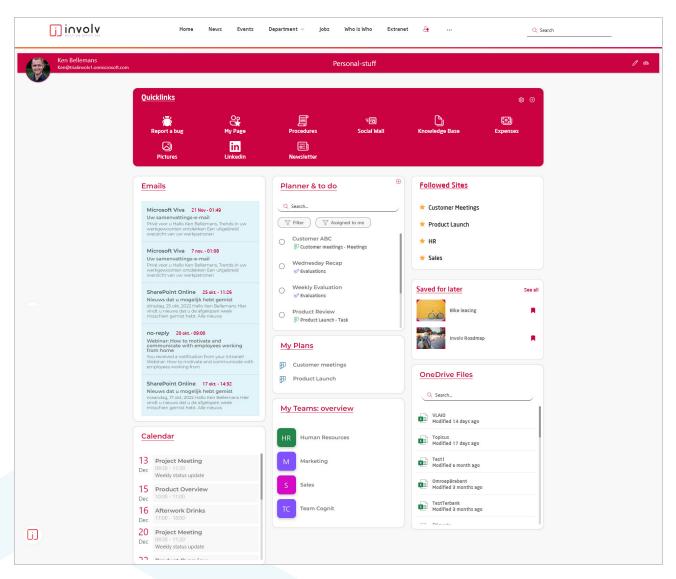
involv

Involv's approach to digital signage is simple but flexible.



# 'My Page' and other M365 integrations

Involv integrates well with M365 applications, particularly in 'My Page'; which provides a feed of emails, upcoming calendar appointments, recent videos on Stream, links to Planner, outstanding tasks (which can be marked as complete or new ones added from the web part), and followed SharePoint sites. It's also possible to include the user's Yammer feed and a feed of recent activity on MS Teams, where wanted.



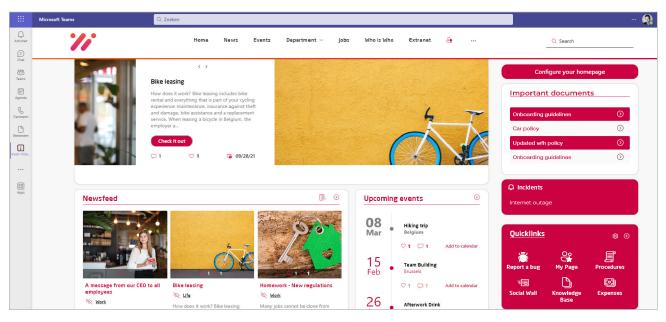
'My page' aggregates activities from across M365 applications.



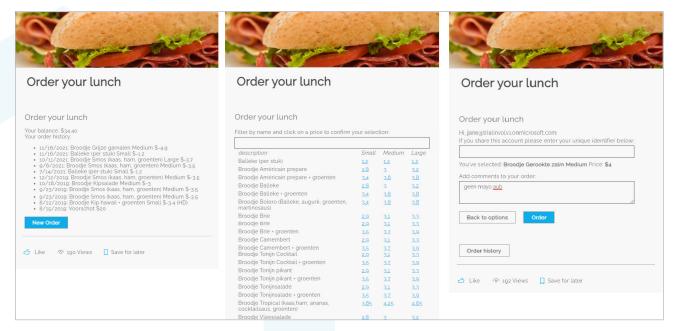
M365 integrations can expand beyond My Page, such as in the people directory where people's availability is displayed from MS Teams and users can begin chats or calls directly from colleague's profile pages.

Involv can be integrated as an app in the MS Teams left-hand menu, which will provide the full Involv experience. Involv can also be integrated into MS Teams through Viva Connections, which again will present the Involv experience as an application but includes the Connections left-hand menu.

Other examples of M365 integration are PowerApps that have been used to create some simple features. One example is 'Lunch menu' that enables users to place a lunch order from a defined menu, which tracks the history and deducts costs from a budget. Another example is a ticketing system allows users to create tickets which are kept in a SharePoint list for appropriate users to manage. The end-user is notified via email when the ticket status is changed.



Involv presented within MS Teams, via the Viva Connections menu.



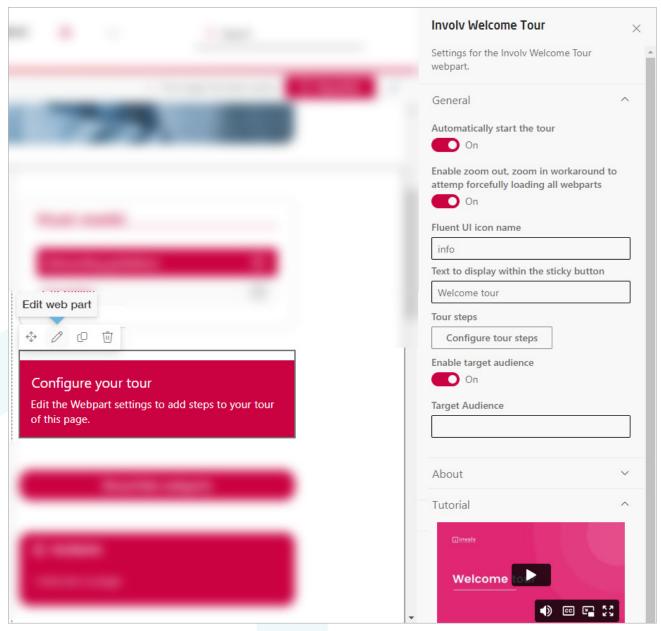
Involv includes a simple lunch order system, complete with budget tracking.



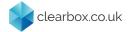
# Adoption support and tutorials

Intranet products are getting increasingly sophisticated and while Involv is easy to use, the sheer breadth of features means it is helpful for admins and employees to have some guidance around what those features are and how they work. This sort of support is becoming common in SaaS products where the experience is fairly standard, but it is unusual in SharePoint add-on products that allow more variation. Involv is to be applauded for including this capability and making it so easy for clients to configure and adapt for their employees.

The first area of focus is supplied by Cognit themselves, covering support for the admin interface and publishing tools. For many of these, the administration panel includes an embedded tutorial such as how to edit the navigation and how to add a news page. At the time of the review Cognit were revamping all of these to ensure they reflect the latest features but already many elements have this support. The videos were already available via Involv's website and YouTube channel but having them embedded in the controls for the web part helps admins know support is there as well as providing it in context.

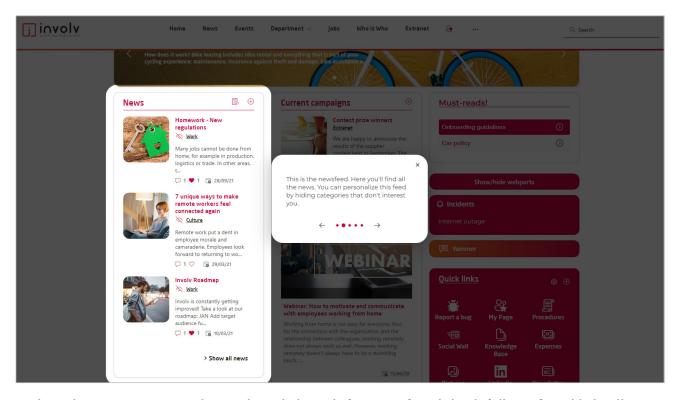


The admin and publishing interface has contextual help including embedded video tutorials.

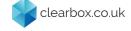


Involv's welcome tour feature is included as standard and is shown to employees when first visiting the site. Page web parts are highlighted in turn while explanatory text describes their function. Employees are able to step forward or back through the tour, with each highlighted part having its own description.

What is particularly powerful about this feature is that clients have complete control over the text, allowing them to use language specific and appropriate for their employees. The tour feature can be deployed on any page of the intranet, so this can be used not only for the initial launch of the intranet but can also be used when launching a new feature to employees.

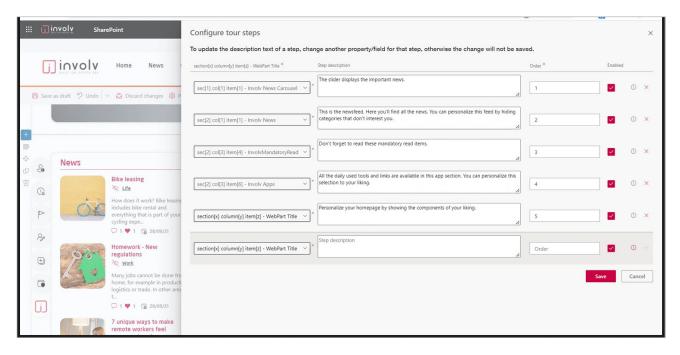


The welcome tour steps employees through the main features of Involv but is fully configurable by clients.



The interface for building tours is straightforward for admins to do this activity themselves, although Cognit are happy to help. The interface allows admins to select the web part they want to highlight using a simple drop-down picker. Introductory text is then added for each web part that will be highlighted along with the feature. Each one of these can be sequenced to show one after the other, as employees click through the features.

Adoption support is an important part of any intranet implementation programme and anything that helps clients will be very welcome. We think that Cognit has done a great job with this in Involv. The tools provide a capability that customers will appreciate and be able to use easily to build their own tours.



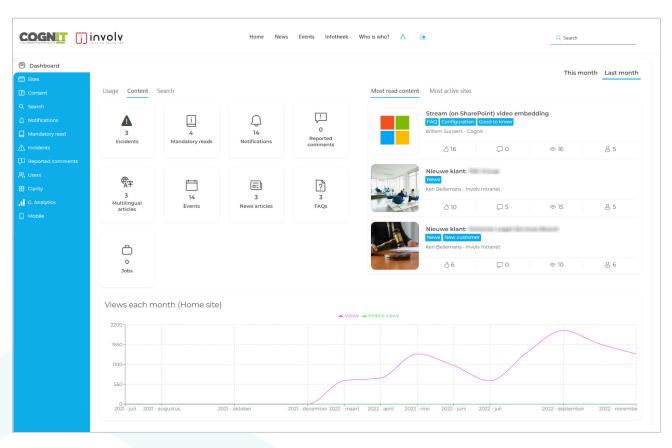
Involv's interface makes configuring the welcome tour a straightforward process.



# **Analytics**

Involv comes with a comprehensive suite of dashboards and reports that provide a lot of information for intranet managers and content owners alike. We particularly like how the analytics are laid out so that the major functions of the platform have their own sections, then within these the information is laid out clearly. We also like how each page within the analytics shows KPIs for each section, with the ability to drill into and filter more detail below.

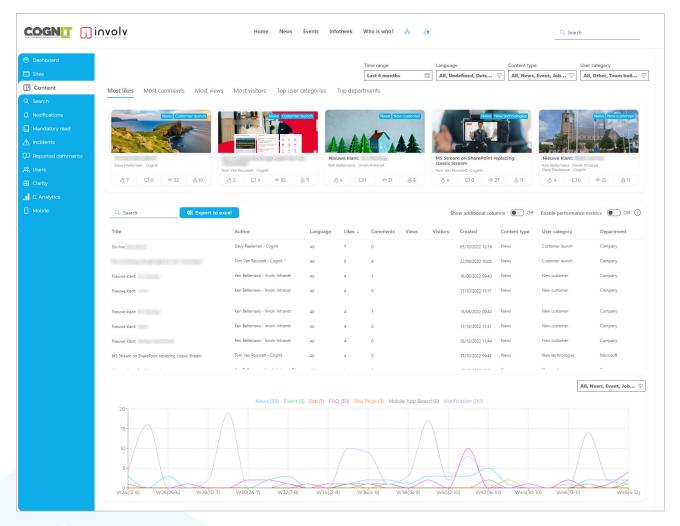
Overall traffic measurement shows the usual visitor, visits, top pages, and average time spent along with information about peak times and days for visits to the intranet. Along with KPIs, visitor numbers are graphed on a dashboard and the timeframe can be changed between 7, 30 and 90 days. The content dashboard KPIs report on the number of types of content (for example news, events, and FAQs) along with the most read content and most active sites. We really like the thumbnail page images that are shown for the most read content alongside their respective numbers.



The content dashboard shows KPIs for intranet content types.



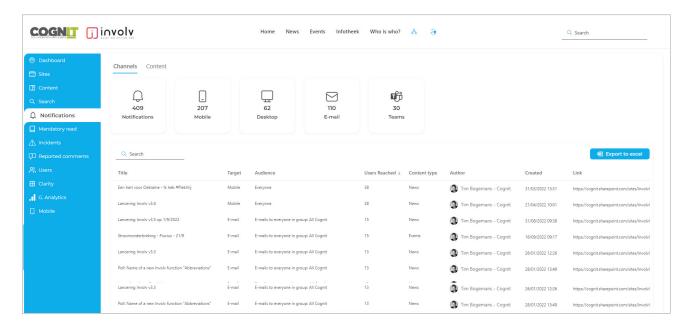
Going into more detail, admins can drill into top content and there are tabbed views for information including most likes, comments and views. Content can be filtered by date, type and category to enable analysis for detailed areas of the site. Content types, department owners and categories are also shown, with categories being used for campaign tracking across multiple articles. A nice feature of this view is the 'enable performance metrics' switch that shows whether content is performing better or worse than average, so managers can identify what content is doing well and not so well, then try to understand why.



Top content can be analysed by traffic and engagement.



Involv's analytics is comprehensive, covering many of the product features in some way, meaning there are reports for notifications, mandatory reads, incidents and reported comments. Cognit can configure this to include any of Involv's features that use a SharePoint list, of which there are many, meaning the analytics can be expanded yet further.



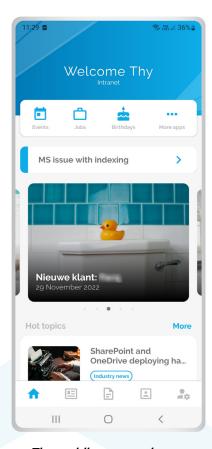
Analytics can cover any of the features that use a SharePoint list.



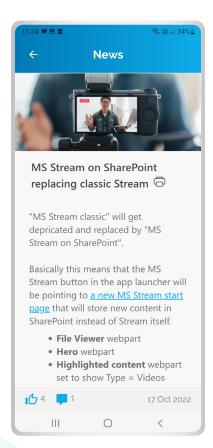
# Mobile app

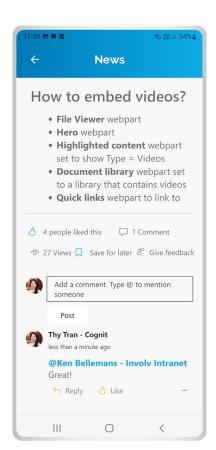
Involv's mobile app complements the desktop version well and supports some additional use cases, such as push notifications, that are not available in the mobile-responsive desktop version. The app is available from public app stores but can also be managed through an MDM platform, such as Microsoft Intune, where it can be custom branded.

The mobile app can be configured to show different content from the responsive version of the intranet, although this needs to be done by the vendor. The mobile app home page can be configured to include several different feeds, such as newsfeeds, event feeds, and an FAQ. News articles and other content is displayed via an iframe showing the desktop content, although the experience is seamless so users wouldn't know. This means that all desktop features, such as video and commenting, simply work as they do on desktop.









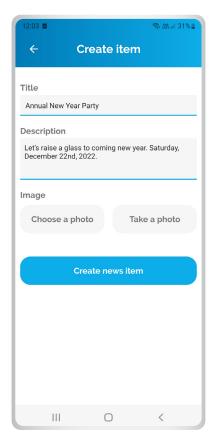
News articles are wrapped responsive content, but support comments, likes and bookmarks.

Cognit has built a lightweight publishing system on the app to enable contributions from mobile workers called 'news boards'. Customers are using the news boards for a variety of purposes, such as sharing pictures of construction sites or managing a classified ads marketplace for employees. Content can be added simply with a title, body text and optional picture(s). We like this simple approach to mobile publishing and can see this being used by a range of roles to provide quick updates and news.

People-centric information feeds are available for the app as well. For organisations that have relevant profile information, such as start dates and dates of birth, the app can show people who are recent hires, have a birthday or service milestone, such as having worked for the company for 5 years. These sorts of features work well to give the mobile experience a more personal and human feel.







Introducing new employees.

The mobile news board allows employees to publish simple content articles right from the mobile app.

# THINGS TO BEAR IN MIND

Involv includes a lot of functionality at a low price, but elements of the product require some technical knowledge or support from the vendor to configure and make changes. For example, search configurations need some specialised knowledge that companies might have themselves but if not will need to rely on Cognit. The mobile app is not client configurable at all and will need ongoing support for any changes. Fortunately, Cognit has done very well in our voice of the customer research, being described as professional and responsive, so this should not be a concern when choosing the product.

Cognit has made a lot of enhancements to the content editing and publishing process in standard SharePoint, including additional templates, content metadata, multilingual support and targeting. However, when it comes to putting words on the page the experience is still standard SharePoint. This means that content creators have freedom around fonts, styles, and layouts that some organisations will welcome but others that value consistency of styles and layouts will not.

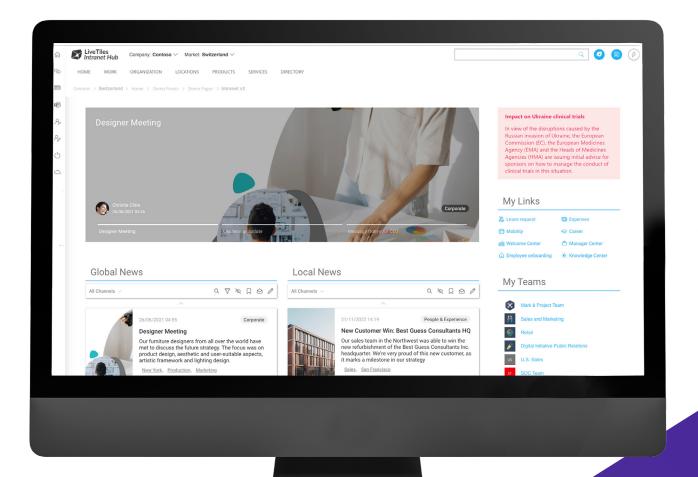
The mobile app has good support for formal communication and engagement, even including a lightweight publishing feature for contributions from the field. However, social communities are missing along with chat, and these can both be significant use cases for mobile access.

# Why choose this product

Involv offers a capable, ready-to-use intranet solution at a very good price-point for those businesses that may not have the time, budget or resources for extensive SharePoint configuration. It makes excellent use of SharePoint lists to build useful and easy-to-use functionality and helps admins and employees benefit from features through helpful adoption tools such as the welcome tour. We think Involv will particularly appeal to small and medium-sized organisations but also enterprise customers that are looking for excellent ongoing support from the supplier.







# Our view in one tweet

The @LiveTiles platform offers rich functionality for a SharePoint-based intranet, and extensive mobile features to engage frontline staff.



# LiveTiles Employee Experience Platform owned by LiveTiles

LiveTiles Employee Experience Platform, owned by LiveTiles (Melbourne, Australia), consists of a range of mature, featurerich products and modules that have evolved since the company was established in 2014. The LiveTiles platform includes a SharePoint intranet product and an independent intranet product called 'Reach', which is optimised for mobile use. Each can be purchased separately, but LiveTiles say that enterprise businesses often use both products, and that is what we have reviewed here.

The SharePoint intranet product adds some well-designed features for navigation and information finding on top of the standard modern SharePoint offering. Reach provides an easy way for frontline workers to get connected, even those without a Microsoft licence. Both products

integrate well with Microsoft Teams, and the platform includes a rich People Directory module and some innovative wellbeing features. The product can also be extended through a documented API and plug-in framework, and grow into a central hub in an organisation's digital workplace.

Overall, LiveTiles offers a good modular approach with a smooth user experience across the products. There are however still some areas where integration can be improved and where there are overlaps between what the products offer. We recommend that customers take the time to work with LiveTiles or a partner to select the right services for their organisation. The Enterprise solution presented here will appeal to larger or more complex organisations with a broad range of needs, and is offered at an attractive price point.



# Summary table of scenario scores

# NO. SCENARIO/SCORE 1 User experience and visual appeal Mobile and frontline support 2 Internal communication 3 Community and engagement Information finding and knowledge management 5 6 Admin experience and governance 7 **Analytics** Digital workplace integrations Microsoft 365 integration 9 10 Wildcard

# **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$\$\$\$
20,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, multi-year commitments, customers only pay for active users, businesses over 20,000 users.

Price includes: Training for admins, training for end users, customer success services, maintenance, product support, branding / theming services, updates and upgrades, choice of modules / add-ons, hosting, access to a community & webinars.

# Key benefits

- The user interface across the different modules works well and some thoughtfully designed
- elements, such as the 'Everywhere panel', improve the experience further.
- Searchable and tabbed mega menus will help organisations with a complex information architecture.
- The Reach product serves mobile users well, including frontline staff without Microsoft 365 licences.
- The People Directory module is excellent, offering some of the richest functionality among the products in this report.
- The analytics module offers helpful reports for communicators to track the success of their campaigns.

# Improvements and considerations

- The user interface for administrators is not fully streamlined across the different modules, so admins will need to acclimatise to more than one.
- LiveTiles has worked to integrate the publishing experience between Reach and SharePoint, but some level of complexity remains. Communicators will need to spend time to understand the options, consider their content strategy, and use the available features for targeting their content to the right audiences.
- The analytics module is powerful but currently only reports on content stored in the Reach CMS; an integration with SharePoint content is on the roadmap.



# **Product type**



# **Branding opportunities**

All branding, complex options

# Target businesses



**SMALL** less than 1,000 people



MEDIUM

1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems







Requires SharePoint



Optionally works with SharePoint



Other

# **Sectors**



Business, consulting and management



Engineering and manufacturing



Healthcare



Public services, government and administration



Retail

You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



### Company LiveTiles



# Company founded 2014



### Company locations

Melbourne, Australia (HQ), USA, Ireland, Denmark, Switzerland, Romania, Portugal



ISO 27001 certified
Yes



# Typical client size

1,000 - 10,000 employees



# Largest deployment so far

325,000 employees, dozens of countries



#### Partner locations

Please <u>see their website</u> for details.



#### Customers

Clients include: Pepsico, Virgin, Entain, UHG, Legal & General, Creditsafe, Deakin University, BDO, Bluescope Steel, Equans, Zürich Airport, Nestlé. Please see their website for more.

# Product and technical details

Name of product	LiveTiles Employee Experience Platform
Product launched	2014
Current version	42.2.116
Accessibility	WCAG 2.1 AA compliant



### Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services

Vendorhosted Microsoft 365 tenant

Other

### Data residency

Western Europe (Dublin and Amsterdam), Switzerland, USA, Australia, any other Microsoft data centre region upon request.

### Client data encrypted

In transit only

In transit and at rest

At rest only

## **Authentication supported**

Azure Active Directory

**ADFS** 

Open ID

Oauth

G Suite

Other\*

\*Azure AD B2C

## Search technology

Apache Lucene/ Solr

Apache Lucene/ Elastic

Microsoft

Vendor's own

Other\*

\*Coveo

# Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

# SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

# Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other



### Reverse-out options

A database export of the client data is transferred to the client upon request and before all client data is deleted.

### Languages supported

English, German, French, Spanish, Italian, Chinese, Turkish, all other languages upon request at no additional cost.

#### Machine translation

Yes - via the product

### Right to left script

Yes

# Set-up and support

### Set-up process for new clients

Depending on the features chosen, the setup can be anywhere from a one-click installation for a standalone deployment (as per the free trial on LiveTiles' website) or up to 3 months for comprehensive platforms including Microsoft Teams and SharePoint integration with consulting engagements. Typical deployments leveraging the LiveTiles standard features without customisation but including integration with Microsoft 365 can be done within 2-4 weeks.

# **Product updates**

LiveTiles provides 3 to 6 updates per quarter.

# Product update process

All customers updated at once.

# Technical support

LiveTiles provides up to all day, every day support with a 'follow the sun' model. Their support team is based in USA, Denmark, Ireland, Switzerland and Australia. They provide support in multiple languages including English, German, French, Spanish, Danish, Greek and Hungarian.

# **User community**

LiveTiles has a customer community and knowledge base, and runs a Customer Advisory Board (CAB) for select customers, as well as user conferences such as LiveTilesX, Love Your Work and the Let's Connect Conference.



# In their own words

LiveTiles says: "LiveTiles provides a holistic employee experience platform for both frontline and knowledge workers, combining a light-weight app focusing on connection, engagement and well-being with a turnkey intranet for more customized comms and collaboration applications and integration capabilities."

# Their view of the marketplace

LiveTiles says: "The LiveTiles platform helps to connect people to an organisation's purpose, brand and vision, to engage employees around goals and values, to enable people to perform at their very best, to be healthy and happy at work and in life so that they're motivated to contribute to organisational success and inspired to find new and more innovative ways of working."

# Voice of the customer

What customers appreciate most about the product is how it adds value on top of SharePoint in those areas where standard SharePoint falls short. "The product sits well on top of SharePoint Online, providing additional functionality where there are gaps in the out-of-the-box SharePoint product" says one customer, while another praises one feature in particular: "The left menu, now called LiveTiles Everywhere, is quite powerful and a much more polished solution than the Microsoft app bar." For another customer, the add-on functionality is critical to the success of their intranet: "Our company has built our intranet around specific features that LiveTiles provides, such as the notice board, employee handbooks, and governance tools."

When asked about changes or improvements to the product, few customers ask for specific features, but instead comment on the overall evolution of the product. One customer wants "more focus on clients like us that still use classic SharePoint" while another requests "a smooth migration path for us, when new versions arrive"; LiveTiles says that this is on their product roadmap. Some other customers express concern about how LiveTiles is adapting to the fast-evolving Microsoft offering. "Microsoft almost closed the gap in features and LiveTiles has a tough time keeping up with the changes in modern SharePoint", according to one customer. Another customer suggests to "maybe de-customise things where possible, considering the advances that Microsoft makes". LiveTiles has said that this is an issue around the communication of new product features to clients, which they plan to address.

Feedback about working together with LiveTiles is mainly positive, although one customer expressed some concerns about the relationship: "While the support for issues has been OK, the client team has been difficult to reach after we signed the deal, and we had to rely on the partner." LiveTiles says that it is standard practice to handle implementations through their partner network. The majority of clients are happy with the levels of support, and one client praises the strategic guidance they received from LiveTiles: "Great support function, and outstanding help and guidance on more advanced and strategic matters."



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#### Local News



New Customer Win: Best Guess Consultants HQ Our sales team in the Northwest was able to win the new refurbishment of the Best Guess Consultants Inc. headquarter. We're very proud of this new customer, as it marks a milestone in our strategy Sales, San Francisco

3 D



General People & Experience Security Update for COVID-19 Vaccines

The safety of authorised COVID-19 vaccines is continuously monitored, and updated information is regularly provided to the public.

Education, Compliance

**4** 3 (∋ 3 **■** 

#### Impact on Ukraine clinical trials

In view of the disruptions caused by the Russian invasion of Ukraine, the European Commission (EC), the European Medicines Agency (EMA) and the Heads of Medicines Agencies (HMA) are issuing initial advice for sponsors on how to manage the conduct of clinical trials in this situation.

Q (3) (3)

#### My Links



#### My Teams



#### In the Media





Positivity by Writing...

Dad Teaches Positivity by Writing... Teaching children the power of positivity at ...

POP ①7 days ago



Women Who Released Self-Doubt... Self-doubt can paralyze you with fear and m..

POP ① 9 days ago

#### People & Culture

Global News

26/06/2021 04:55

Designer Meeting

Leadership Update

23/06/2021 14:19

Message from your CEO

New York, Production, Marketing

Our furniture designers from all over the world have met to discuss the future strategy. The focus was on product design, aesthetic and user-suitable aspects, artistic framework and lighting design.

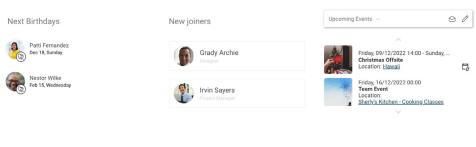
This year's Leadership Meeting took place in sunny Los Angeles and lasted 3 days.

We are facing a major turning point in the global economy and society that will change the way we all do business.

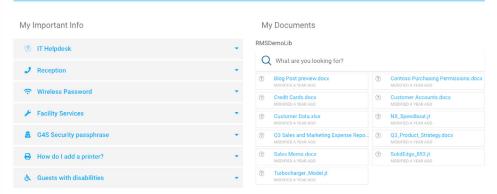
Corporate Communications, Los Angeles

Corporate Communications. Leadership

All Channels



#### My Work





# REVIEW

# 1. User experience and visual appeal

score 4

The LiveTiles platform encompasses two different intranet experiences: Reach, an independent product optimised for mobile, and a SharePoint-based product. Inevitably, the user interface will be slightly different in the two products, but LiveTiles does an excellent job of integrating both and offering a consistent user experience. For example, news articles are created once and are presented in a consistent way in the SharePoint desktop experience, in the

Reach app, and in MS Teams.

Navigation is especially strong in the SharePoint intranet module. The mega menu is not dependent on the SharePoint hub infrastructure and includes features, such as a matrix-based navigation, that will appeal to large and complex organisations. We also like the 'Everywhere panel', which is a floating navigation bar that is customisable with shortcuts to content and intranet functionality. Details and screenshots of the navigation features are in the Highlights section. Navigation in Reach is centred around a simple left-hand navigation and is managed separately, so users accessing both products will see a slightly different navigation experience.

Notifications are available in both the Reach and SharePoint products, but accessed in different menu areas. In the Reach app, notifications are highly configurable, so employees decide on which topics and in which format they want to be informed. Reach is tightly integrated with MS Teams (more about this in Scenario 9) and notifications can also be integrated with the MS Teams activity feed.

The options to apply branding and visual identity elements in the Reach product are fairly basic, while in the SharePoint-based intranet they are extensive. The SharePoint product goes well beyond the standard SharePoint themes and includes a large collection of predefined designs to choose from. These are then adapted to specific needs within an integrated theme editor. There is plenty of flexibility to create sub-brands by applying different styles to different areas. If desired, LiveTiles or their partners will work with clients to design and configure the site themselves. We were shown some appealing examples from a selection of customers to illustrate what can be achieved.



# 2. Mobile and frontline support

3.5+

This scenario broadly covers Reach functionality, which is what LiveTiles recommends for mobile and frontline requirements. For those wanting the SharePoint intranet product on mobile there is no native app, but the site is fully responsive and can also be accessed through the MS Teams app.

Reach has been optimised for a mobile experience, although it is also available on desktop. Several options are supported to give users access. The product can work together with Microsoft 365 and Azure AD if desired, but a Microsoft licence is not required and many other identity management systems are supported. It's also possible to upload a list of users, or users can be invited or self-register via a link or QR code and update their details themselves. The app is available in the public stores for iOS and Android, and deployment to managed devices using an MDM solution is also supported.

Reach has an attractive, card-based user interface with a single-column layout. Icons at the bottom of the screen give access to often used areas, such as 'my news' or 'my apps'. Other functionality is reached through a clear left-hand side navigation menu. Central to the app is the 'Stream' which brings news, events and social content together in a single feed. Reference content is targeted to specific profiles, so frontline workers see the procedures and the manuals that are relevant to them. The layout can be configured within the admin pane, where admins control what content is displayed in the navigation, and what functionality is available. White labelling in the iOS and Android app stores is available at an additional cost.

Several features within Reach will be useful for frontline workers. Reach offers a basic chat feature, which works on mobile, in the browser, and is also available via MS Teams. This will be valuable to organisations where office workers, working in MS Teams, need to communicate with frontline staff without a Microsoft licence. Another tool that's specific to Reach is an additional paid-for service called 'Roll Call', which asks users to confirm they're safe in case of emergency. There is also an innovative tool called 'MyReachZero' supporting actions against climate change; see Scenario 4 for details. For those who want to go beyond the built-in features, there is a documented API available that allows developers to build links to additional systems (see also Scenario 8).

# 3. Internal communication

score 3+

There are two approaches for publishing news and other content within the LiveTiles platform. While it is possible to use the standard modern SharePoint interface for news creation, the recommended approach is the Reach news editor, which is integrated with SharePoint. It offers a clean, well-designed template to work from, as well as features for tagging and targeting; details are in the Highlights section. Audience targeting is based on group membership

and the use of publication channels. There is an option for users to indicate their preferences, but it's not as flexible as other solutions we've seen in this report. A solution that allows users to follow news based on keywords is on the product roadmap.

A role-based approval workflow for content approvers and creators is available out of the box; more complex workflows will need to be set up using Power Automate. There are some features to support the editorial process, such as an editor chat to have conversations about the



content of an article, as well as a preview function. There is also a simple overview available to authors and editors of articles in draft status.

Reference pages are handled the same way as news articles: the content can be created within the Reach editor or directly in SharePoint. LiveTiles offers a range of web parts that allow content authors to build rich and visually attractive pages. Reach pages are available inside the SharePoint solution, but SharePoint content is only available in Reach if the user has a license. Communicators and content owners will need to take this into account, for instance by using the audience targeting functionality to ensure that frontline workers have access to the content they need.

Urgent and crisis communications are supported in different ways across both products. A news article can be set as an alert message and will then appear as a banner at the top of the news area. Alert messages can also be published into a specific channel and displayed in a dedicated crisis web part; see the Highlights section for details.

The features of Reach can also be used to share content externally, for instance for staff to advocate and share content on social media channels. The analytics platform allows tracking of engagement statistics – see more in Scenario 7. There is no out-of-the-box integration with digital signage systems; LiveTiles say that this can be achieved using their API and open component library.

# 4. Community and engagement

SCORE 3.5

The Reach product offers a range of community and social features that are oriented towards mobile use, but are also available in the SharePoint product through specific web parts.

At the core is the Reach posts component. Posts are used to provide short pieces of information, ideas, and knowledge sharing. Users can comment, react (like and more, such as emojis) and @mention in Reach posts and news articles;

it's simple for publishers to turn off these features where required. Users may add their own content in Reach 'Groups' in which communities collaborate or discuss a particular subject. In the SharePoint product, a community template is available where content from a Reach Group can be surfaced. LiveTiles has recently added a content moderation feature based on Azure Cognitive Services, and allow admins to remove inappropriate posts. Reach 'Groups' are comparable to Yammer groups but miss the richer functionality around gamification. There are also no templates in the product to support idea management in a structured way.

Reach powers functionality around events, where publishers complete a simple event template and share it into relevant channels. Users may register attendance in advance and access a moderated chat before, during and after the event.

Included within the price provided for this report is an additional poll and wellbeing product called 'LiveTiles Vibe'. Vibe offers interactive (and optionally anonymous) polls which allow team leaders to engage with their teams and get a sense of their wellbeing. Polls can be responded to via a link in a post, from within an email message, from Viva Connections or MS Teams. While there is some overlap in functionality with Viva Insights, we do see the value of this well-executed module that complements Reach and the SharePoint intranet product nicely.

An innovative tool that we particularly like is called 'MyReachZero', which allows organisations to engage with their employees on the subject of climate change. Employees enter their personal efforts and commitments into the tool, and a climate engagement tracker will show the impact of all individual contributions towards the company's net zero targets.



# 5. Information finding and knowledge management

3.5+

LiveTiles offers an attractive search experience for users of the SharePoint-based product as well as for mobile users. In the SharePoint-based environment, a type-ahead search bar sits prominently in the header of the page and replaces the SharePoint search bar. Search results are presented on attractive cards, with thumbnails to reflect the type of content displayed. Users can filter the results using broad categories such as documents and

people, and then drill down further based on additional refiners. Content stored in SharePoint as well as in LiveTiles' own CMS is indexed and displayed. There is also a separate option to search the navigation menus, as explained in Scenario 1.

LiveTiles also offers an integration with enterprise search provider Coveo. This will be of interest to large and complex organisations who wish to invest in enterprise search. Clients will need to purchase a separate Coveo licence to make it work.

The search experience for mobile users in Reach is similar, with the same card-based layout of search results and further filtering options. Accessing the search window is not consistent across the product though; there is a search menu item to access the global search, and in some places also a search box or a search icon to access a contextual search. We found the different search options on mobile less intuitive than in the SharePoint desktop product.

People search and user profile management are the focus of LiveTiles Directory, a separate product but included in the pricing submitted for this review. It comes with a customisable organisation chart and is one of the best people finding tools we've seen in this report, see Scenario 10 and the Highlights section for details.

Knowledge finding is supported in the SharePoint-based product in a number of ways. LiveTiles includes a provisioning wizard to set up SharePoint sites based on specific templates. Metadata can be associated with the site, and content published in the site will automatically inherit appropriate metadata, improving their findability through search. LiveTiles comes with a number of web parts and widgets such as an accordion and an automatically generated table of content for a documentation area. We also like the filtering web part that shows a visually attractive inventory of pages on broad topics such as a product catalogue or an overview of supplies.

# 6. Admin experience and governance

3.5+

You don't have to be a technical expert to use the site or page-level admin functionality in LiveTiles. Recent updates have improved the integration between the SharePoint and the Reach products, and a centralised 'Admin Center' is now available to manage users, permissions and audiences in one place. Not all admin functionality is integrated yet, so for some aspects administrators will have to use functionality in either of the two modules.

LiveTiles say that they intend to integrate more admin functionality into the Admin Center over time. However, as with all feature-rich products, training will be needed to make sure that administrators make the most out of the product suite and know what to use when.

Managing page layouts is straightforward. The LiveTiles SharePoint module uses either the standard modern SharePoint experience for creating pages, or can be configured to use its own drag-and-drop functionality. A range of web parts is available to help present information in



an engaging way. Intranet managers can see built-in heatmaps that show which web parts are popular and use the tool to intelligently rearrange web parts based on usage statistics. Admins also have a straightforward interface to edit elements such as templates and metadata, as well as the mega menu and Everywhere panel.

A governance dashboard provides content owners with a simple interface to manage their content in Reach and SharePoint. From here, revisions of the content are accessible, and content can be unpublished if it has become outdated. Reminders can be sent to content owners when their content is due to expire, but we would also like to see additional features around the transfer of ownership of content.

Multilingual functionality within the product is comprehensive, assuming that you follow the recommended approach of using the Reach functionality for creating content. Publishers can choose to manually add translations that are saved alongside the original language version, and automated translation based on the Azure translation service is used to generate a draft version of the content. Based on the user's preferred language settings, content will be presented in their preferred language where available. In other situations, automated translation is available, for instance to translate social content on the fly. A helpful additional feature would be a mechanism to notify a translator if the original is updated.

# 7. Analytics

SCORE 3+

Comprehensive analytics are available in LiveTiles for content residing in the Reach product. Editors and administrators have access to a range of reports about content usage and adoption. There are also detailed reports that provide actionable insights into the reasons why a news article or campaign is successful or not; details are in the Highlights section.

On the SharePoint platform however, analytics are basic and limited to a heatmap of web parts on a page, and some high-level information on a page-by-page basis. LiveTiles says that it is on their roadmap to release a SharePoint connector into the platform. This will make it possible to include data about standard SharePoint content into the analytics reports, which would increase their value further. An integration with Google Analytics is also available, typically for those organisations who already use Google Analytics in other areas of the business.

Mandatory reads are supported in two different ways. A 'confirm' option is available on news articles and content pages, with a downloadable list of users who have confirmed they've read the content. It's also possible to make certain policies or procedures mandatory to read for a particular group of users. There are some useful features to track who has acknowledged reading the document, and send reminders to those that haven't, but this functionality is in a different area of the product, not integrated with the other analytics.

Communicators can see popular search terms in Reach, nicely integrated into the analytics reports. With some additional configuration, there is the ability to access more granular search data; this is in addition to the detailed search analytics if customers have selected the Coveo search product and paid the additional licence costs. The SharePoint intranet product currently relies on search analytics from Microsoft; we look forward to seeing the SharePoint connector implemented to provide a truly cohesive experience.



# 8. Digital workplace integrations

SCORE 3+

LiveTiles has a number of integrations readily available within the product, and comes with an API and an integration platform for customers and partners to build their own. Integrations with enterprise business applications are available for ServiceNow, Workday and Salesforce. We were shown the ServiceNow integration, where users see a list of their open tickets and can create a new ticket. The experience works well both on mobile and in the

SharePoint platform. Although the user can see progress made on open tickets, responses come via email and links will take users into the ServiceNow platform.

Other useful out-of-the-box integrations include a configurable RSS feed, integration with video platforms YouTube, Vimeo and Kaltura, and with Unsplash and Getty Images for stock photography. Worth mentioning is also an integration with Google Maps and OpenStreetMap to insert maps into SharePoint pages.

For customers and partners who want to go beyond what's available out of the box, LiveTiles includes a powerful connector framework, comparable to Power Automate, with a drag-and-drop interface. There is also a fully documented API that allows developers to build plugins for the Reach module. This has the potential to create similar experiences for end users as in the Viva Connections dashboard.

Integrations with popular collaboration and communication tools are available in the SharePoint product. A simple integration with Slack and Workplace by Meta displays content such as an activity feed within a web part and also within the 'Everywhere panel'. The product includes a 'Social' web part which displays content from various public social media channels such as Facebook, Instagram, Pinterest and Twitter.

The Events module within Reach integrates with MS Teams, but also with Zoom and WebEx to be able to create online events outside the Microsoft 365 environment, which will be beneficial for some organisations. The SharePoint module integrates with Box, DropBox and Google Drive, displaying content within dedicated web parts. The optional integration with Coveo (see Scenario 5) provides a federated search capability across many business applications, but the out-of-the-box search in LiveTiles does not federate content from outside the organisation's environment.

# 9. Microsoft 365 integration

SCORE 3.5

The depth of integrations with Microsoft applications varies between the SharePoint intranet module and Reach. The SharePoint intranet makes full use of the underlying SharePoint features, and a rich collection of web parts make it possible to display content such as standard SharePoint news articles alongside content created in LiveTiles. We like the integration offered in the 'Everywhere panel' where an icon called 'My Work' shows a user's MS Teams,

Outlook, and documents. The Microsoft 365 integrations in Reach aren't quite as deep, however, and may require some additional configuration using Power Automate.

The LiveTiles platform offers different ways to work with Microsoft Teams. Both the



SharePoint and Reach products are available as apps within MS Teams, just like individual SharePoint web parts, and also the 'Everywhere panel' can be accessed there. The Reach chat feature and notifications are also accessible from MS Teams, bringing all company chat together, as discussed in Scenario 2.

In the SharePoint intranet, LiveTiles has created a useful and thoughtfully designed site provisioning engine, which creates either SharePoint sites for communities or groups in MS Teams. A configurable wizard takes users through simple steps to request a site, asking about the type of group to be created, the business unit, location and owner.

Yammer content is made available through a web part in the SharePoint-based intranet. Viva Connections is supported as another way to bring the SharePoint product into MS Teams. Support for other Viva components in on LiveTiles' roadmap.

Videos from Stream can be used as a banner news story and can be played from a card within Reach, as well as embedded in pages; the Everywhere panel also plays videos from Stream. The search in Reach will federate content from Microsoft 365, while the SharePoint intranet uses the standard Microsoft federated search capabilities to integrate with the Reach CMS. Overall, the M365 integrations across both products are well considered and implemented, and we've seen improvements to the way the SharePoint and Reach products work together, compared to previous versions reviewed in this report.

# 10. Wildcard

SCORE

LiveTiles demonstrated its People Directory as its wildcard. The Directory is an additional product (but was included as part of the pricing in this report) and is accessible in both Reach and the SharePoint intranet; people data is stored in Active Directory and in the SharePoint user profile. The People Directory helps organisations keep people data up to date, while offering a directory and organisation chart that include features that end users, communicators, and HR managers will welcome.

The real power of the People Directory lies in the back end, which includes a range of highly flexible and customisable features to ensure the quality of people data over time. The product encourages users to update their profile information, either when they visit their page or via email. The email notification is triggered by a bot, where the frequency and tone of messages can be configured. Admins choose whether users manually type information or select from a list, such as skills or interests. Fields can be configured to auto-approve, and it is also possible for HR managers to double-check what someone has entered. There are also settings for automatic profile photo moderation and approval, to ensure that only appropriate photos are uploaded.

The front end of the product offers an intelligent type-ahead search box with an autocomplete function that shows search results by categories such as department or job title. People information is then presented on attractive cards; clicking on a card opens a detailed view. From the profile, users have access to a well-designed organisation chart that can be dynamically explored.

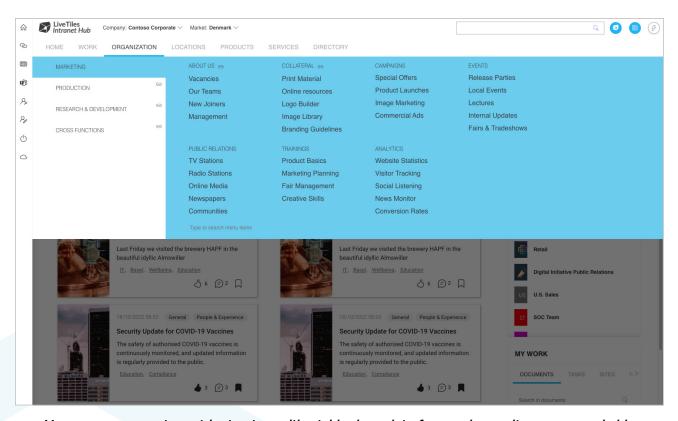
We were impressed by the richness of the features on offer in the People Directory, and by the attention to detail in the execution. It includes more profile information than other products in this report and delivers it in an attractive format. The real business value lies in the breadth and depth of the tools available to encourage profile completion, which will result in more accurate directories.



# **PRODUCT HIGHLIGHTS**

# User interface and navigation

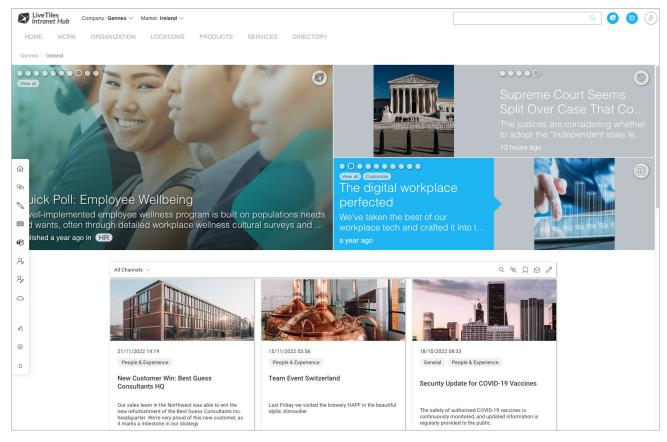
The SharePoint product within the LiveTiles platform includes several noteworthy features to enhance the user interface and help people navigate across the intranet. Large and complex organisations will appreciate the matrix-type mega menu that displays menu items in different layers, using a tabbed interface. This can be combined, as shown in the screenshot, with a top-level menu from where users can choose between different companies or different markets, to support even the most complex multinational corporations. Audience targeting of menu items is available, and we like the option to search within the navigation menu, which will help users to find the right menu item guickly.



Mega menus support a matrix structure with a tabbed user interface, and menu items are searchable.



The 'Everywhere panel' is a floating navigation bar that is customisable with shortcuts to content and intranet functionality, such as an overview of 'My links', recent news, or information coming from external systems. The panel can be made to appear on any page within the intranet, so users always have access to the content they need most. It can either replace SharePoint's own app bar or integrate with it, so there is no conflict between the two.

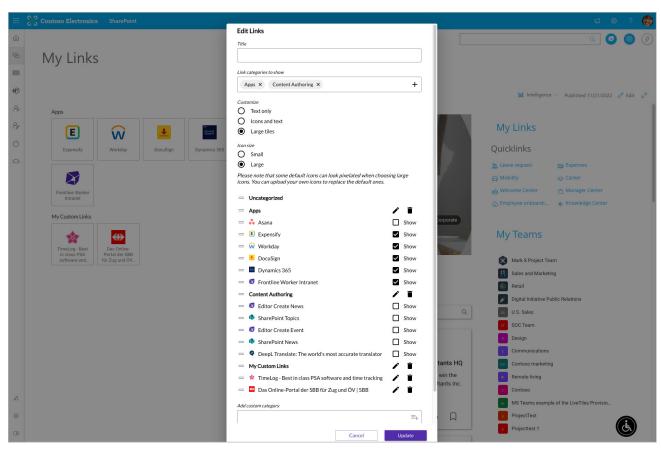


The 'Everywhere panel' can be configured as a floating vertical navigation bar with configurable icons.

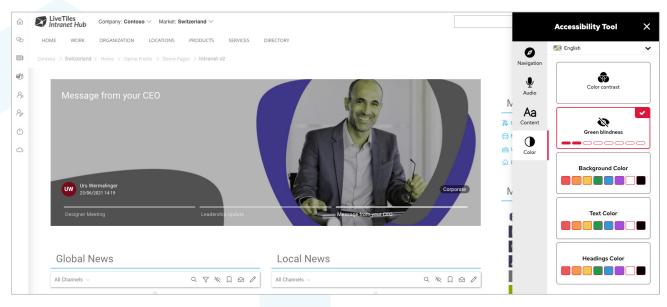


All elements in the user interface are highly customisable. An example is 'My links' which can appear as a web part in a regular SharePoint page or as an icon in the 'Everywhere panel'. Users see a list of relevant links for their role and pick from the list which ones are relevant to add.

A final element worth mentioning is an integrated accessibility panel, where users can configure options for improved contrast, font size, and screen reader settings.



Users select the links most relevant to them from a list that is targeted to their role.



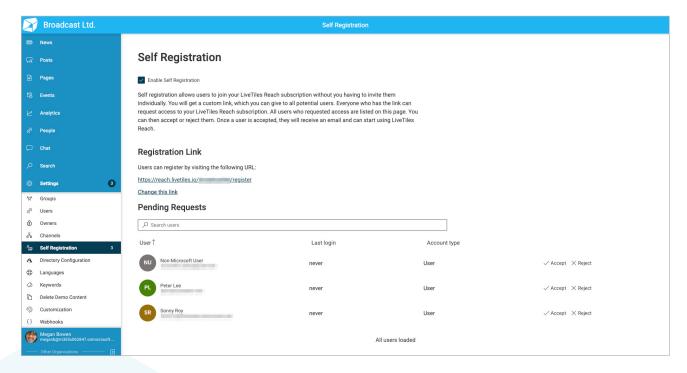
An integrated accessibility tool allows users to configure options for improved navigation, audio, content, and colour.



# Reach - connect frontline users

Reach is the product within the LiveTiles offering that is optimised for mobile usage. It is also available as a separate product, which we have reviewed in our <u>separate report</u>. Reach also includes a browser-based desktop environment, separate from the SharePoint intranet, so organisations can use the product as a lightweight independent intranet. Reach gives customers the ability to connect with frontline staff and external users who don't necessarily have a Microsoft 365 licence. Some clients have taken this even further and used the Reach publishing platform to create a light extranet – publishing articles internally and then tagging content to allow for access by the general public.

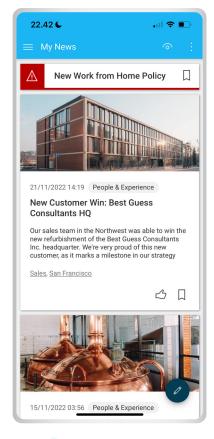
Reach supports many onboarding options, including sending a link for users to self-register and get set up, without needing a specific invitation. Each client gets a custom link, which can be included in email communications, printed out, or set as a QR code to encourage people to sign up.



Users can self-register to access Reach.



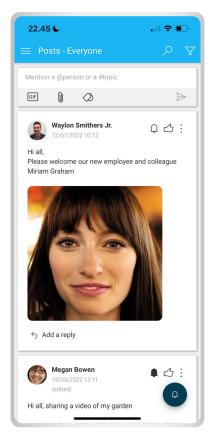
The Reach native app offers news, posts, pages, events, a people finder, and chat as core options out of the box. The push notifications are a useful way for communicators to draw attention to recently published news and users can update their preferences easily via the mobile interface. The chat functionality provides a way for frontline teams to keep in touch with each other and with desk-based colleagues too. The chat removes the need for shadow tech like WhatsApp or needing expensive Microsoft licenses for the frontline. The chat is also accessible via MS Teams, bringing company chat tools together for desk-based users.



Reach provides an attractive interface with a good user experience.

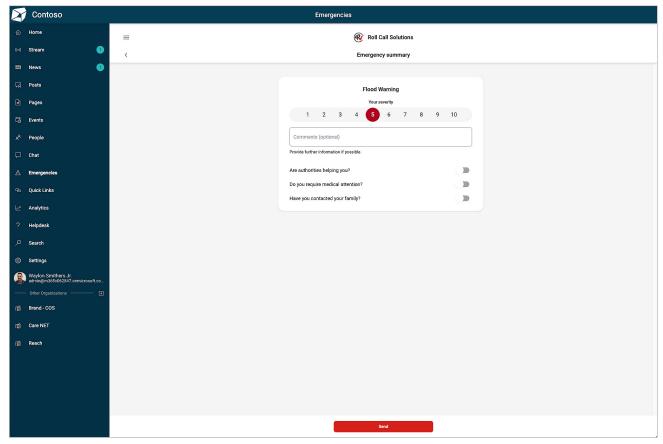


We think communicators and HR teams will value the events functionality.



The chat tool is simple, but effective.

We also like the 'Roll Call' feature; in case of a major crisis, employees get a crisis notification and are requested to give a status update whether they are safe or not. A crisis manager can then follow up based on the incoming data. Note that 'Roll Call' is an additional module for which the pricing is not included in this report.



In case of an emergency, employees are asked to give a status update, letting a crisis manager know if they are safe or not.

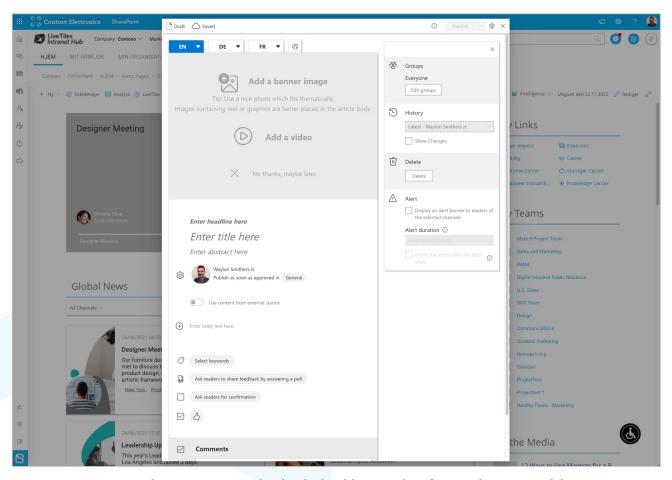


#### News

LiveTiles recommends using the Reach editor for creating news articles. Content created within Reach is stored in the product's own CMS, but can be displayed in standard SharePoint pages and also in MS Teams.

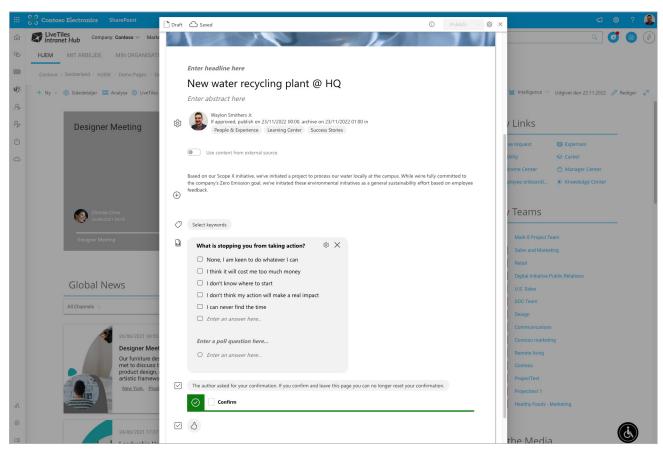
The Reach editor presents content authors with a clean and straightforward template, so users with no SharePoint experience can also easily create attractive articles. The product links with Unsplash and Getty Images for stock imagery. Images are easy to crop to size, move around on the page, and make text flow around them if desired. We like how simple it is to add a quick poll to the article during the creation process.

Targeting is handled through a mechanism of group membership and publication channels. Content authors can target a news article to one or more groups of users. Based on the groups selected, a number of channels for publication are predefined, with some degree of freedom for the publisher to add or remove channels. There is also an option to build target audiences dynamically based on user profile properties. For instance, a group can be set up to include all employees with a particular skill or interest added to their profile.



News authors are presented a simple, intuitive template for creating news articles.

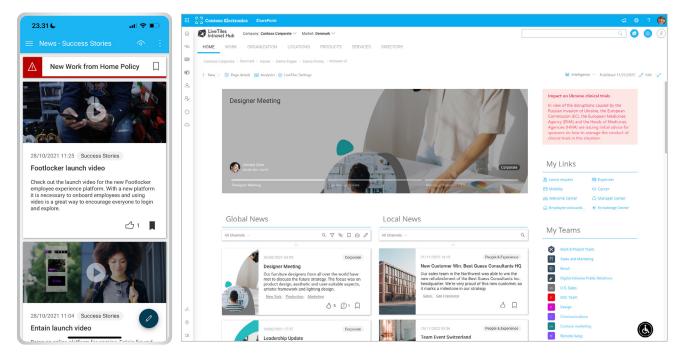




A quick poll is easy to add to a news article, while other optional features such as mandatory reading and commenting can be switched on or off.



Crisis and urgent communication are well supported within LiveTiles. Alert messages can be set up and displayed in different ways. On mobile, users may prefer to receive them as a banner at the top of their news feed, while on desktop there is an option to display them in a dedicated web part that appears prominently on the home page, or as a modal popup window.

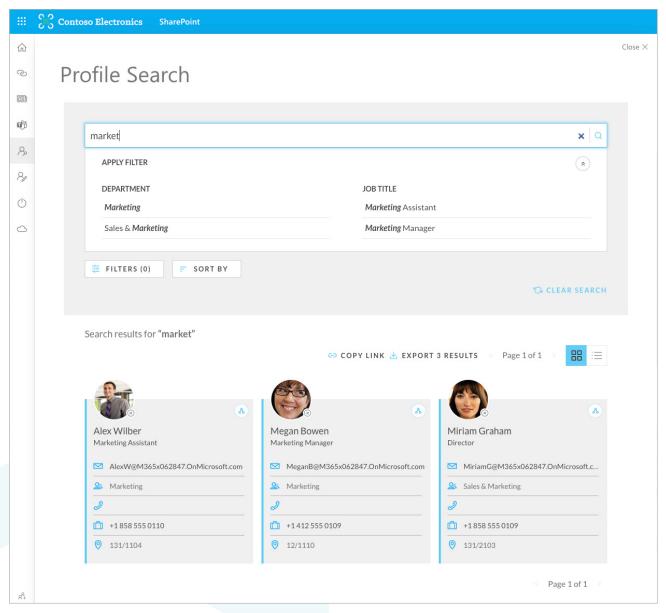


Two different ways to display alert messages: as a banner at the top of the screen, or in a dedicated area on the home page.



### **LiveTiles People Directory**

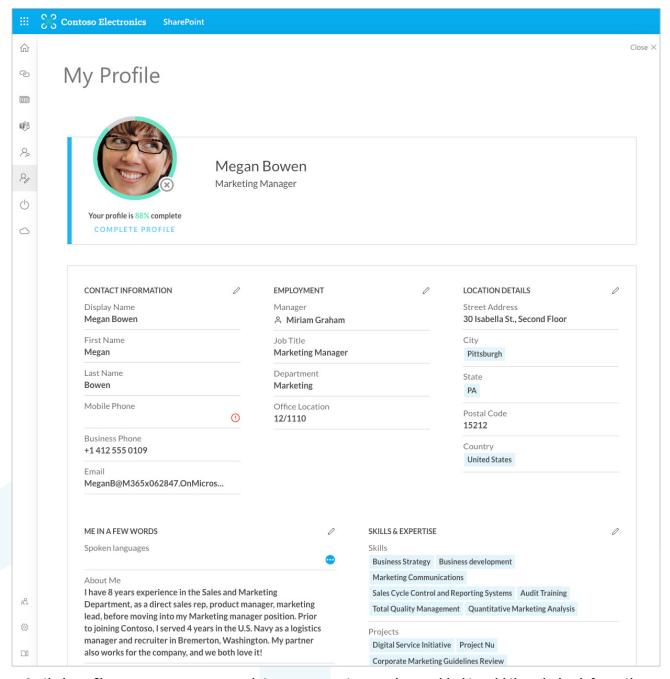
The People Directory is a feature rich module for organisations that value extensive and accurate profile data. By encouraging users to update their profiles, colleagues can be confident that they will find the right people when they search. The tool includes a powerful profile search, with an intelligent type-ahead search box, filtering and sorting capabilities, and an attractive presentation of search results. There is also a feature to export search results into a CSV format.



A well-designed and powerful profile search function with filtering and sorting capabilities.



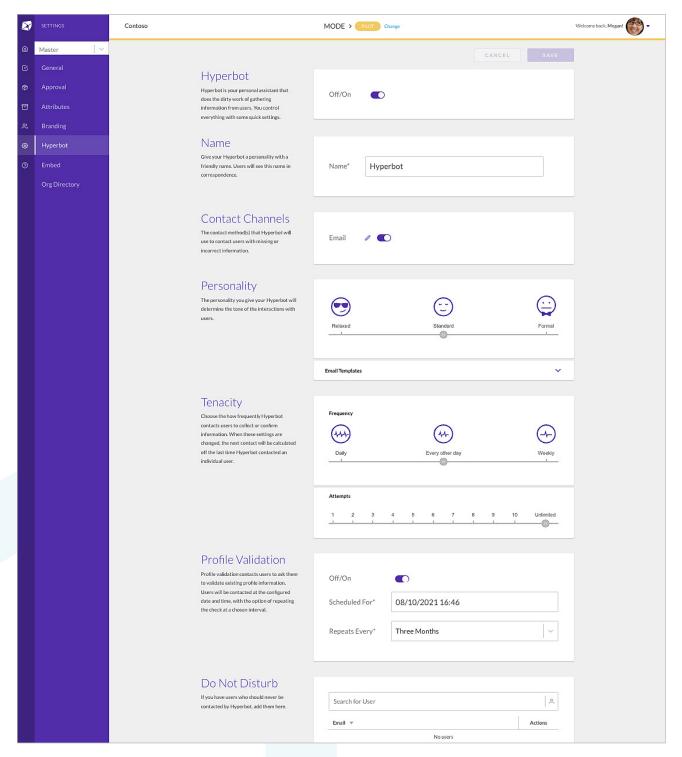
Individual profiles will show a completeness rating and a link to add further content. Clicking the link will open a dialogue box where the missing fields are presented and where inline help explains why data needs to be added or updated. Data fields are structured and this structure can vary based on country and location, which will be useful for telephone numbers and addresses. Field content can also vary based on department, for instance by presenting users with different options for skills and expertise.



On their profile page, users see a completeness percentage and are guided to add the missing information.



We like the usage of bot technology to help with keeping profiles up to date. 'Hyperbot' will send email notifications to users, to remind them to either complete their profile further or to review it on a regular basis. The frequency and tone of the bot's messages can be configured. It's also possible to select users who should not receive automated updates, which we can see would be useful to protect senior stakeholders. Email content is editable and tailorable. Users are able to confirm their details via the link or reply by email to say that details are correct. A health checker dashboard is available to an HR or line manager to follow up on progress.



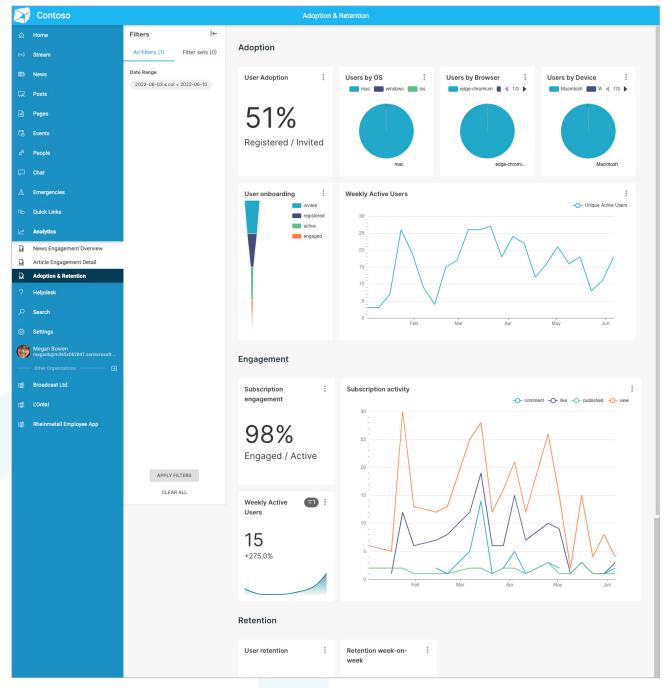
LiveTiles' 'Hyperbot' is highly configurable, including its personality (tone of voice) and tenacity (frequency of reminders).



### **Analytics**

LiveTiles includes a comprehensive analytics module that has a lot of potential for content authors and communicators. It currently provides dashboards only for content stored in the Reach CMS, while the SharePoint content will be integrated via a connector at a later stage; LiveTiles says that this is currently in development.

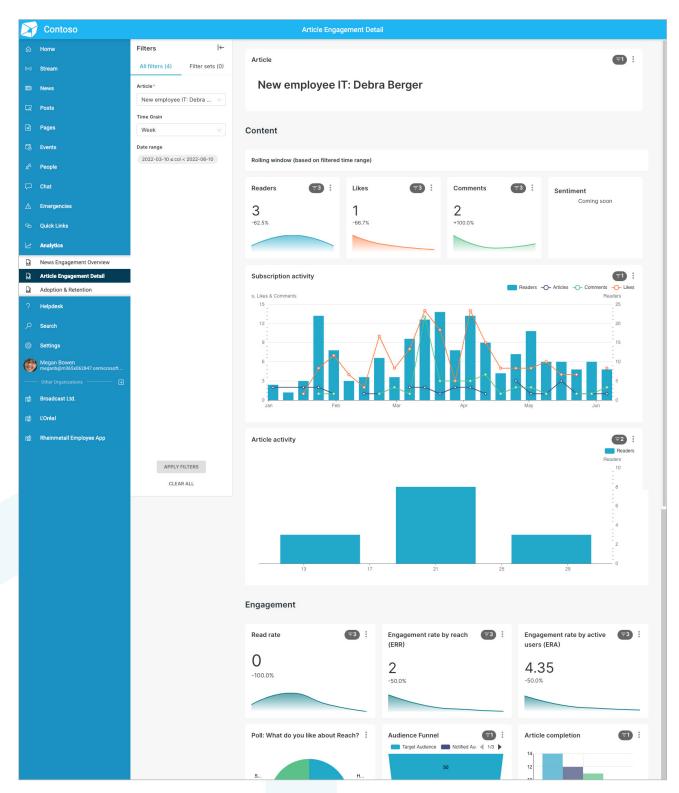
A first dashboard focuses on adoption of the platform and engagement with its content. The adoption part shows how many users are invited, registered, and active on the platform. The engagement part has more details on engagement aspects such as number of likes, shares and posts created. Data can be viewed for different time periods, and filters are available to drill down on a particular department or country.



An adoption dashboard gives information about user adoption of the product and their interaction with it.



A second dashboard provides detailed insights into news articles and will be of particular interest to internal communication managers. An overall dashboard shows statistics on most successful news articles and engagement metrics over a given period of time. Communicators can also filter by campaign, to show the effect of larger communication initiatives, which is a nice feature. Drilling down into an individual article gives insights into how users have interacted with the content, whether they scrolled down to the end, and how they responded to an integrated poll.



Detailed statistics about an individual article include an interesting 'audience funnel'.



# THINGS TO BEAR IN MIND

The LiveTiles platform is primarily made up of two products, but also offers a wide range of modules that do different things and perform in different ways. Overall, the user experience is good, the modules do work well together, and there are a lot of features to like across the platform. However, there are still differences that especially the administrators will need to get used to. LiveTiles is addressing this; a unified admin interface is now available for some, but not for all areas. Customers will also need to consider their needs and objectives carefully to make sure they select the right combination of tools, although LiveTiles and partners will offer advice.

LiveTiles includes a strong analytics platform which has the potential to provide communicators with in-depth, granular insights into adoption and campaign performance. Further integration with the SharePoint part of the offering will be needed to realise its full potential, but LiveTiles says this is on the roadmap.

LiveTiles is an experienced vendor with mature products, having gained knowledge and experience from acquisitions. The market has moved rapidly in the last few years as Microsoft keeps adding new functionality to SharePoint Online. We look forward to seeing how LiveTiles will evolve to support the Viva suite and other Microsoft innovation, a point also expressed by existing clients in the Voice of the Customer section.

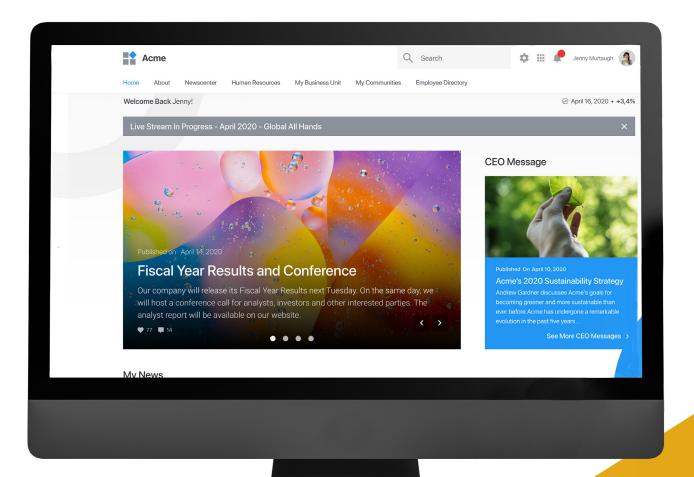
Overall, the LiveTiles platform offers a flexible set of modules that can be configured and joined to offer businesses a suite of tools to match their needs. Given the breadth of functionality in the different modules presented to us, the price point is attractive to enterprise customers.

### Why choose this product

Although LiveTiles is making efforts to package the product attractively also for smaller customers, we believe that the natural target market for the product are large and complex organisations with a diverse employee base and a broad range of needs for their digital workplace. LiveTiles and their partners have the experience of working with large global companies and will provide advice, customisation and additional integration work when required. Large organisations with a significant population of frontline workers will be interested in the mobile features and the attractive price point.







## Our view in one tweet

@LumApps is a flexible, user-friendly solution that offers integration with both Google Workspace and M365 to unify your digital employee experience.



### **LumApps owned by LumApps**

LumApps from LumApps was launched in 2015. Headquartered in France, they are supported by a global implementation partner network. LumApps is both a Microsoft and Google partner, which is evident in the good integration options within the platform, and they are often a leading choice for Google Workspace clients looking to add intranet capabilities.

LumApps is a very flexible, featurerich solution, which delivers an excellent user experience with a consumer-grade flair at times and a decent mobile app. Publishers and admins will also find much to like, as news and other content creation is simple, with good templates and publication workflows. Search is also a highlight as it can index external sources, or use a third-party search engine such as Microsoft's. There are versatile branding / theming options without the need to code CSS, and LumApps supports multibrand needs well. A core feature is fully integrated communities, where individuals can work together on

any topic and we feel offer a great solution to organisations looking to support mature communities of practice. LumApps Play is also worth note - it provides a capable corporate video management feature.

Some other aspects of LumApps are improving but still have a way to go. The analytics have been given a makeover, with a new content-oriented dashboard that shows how different content types are performing across the site, but search reporting is lacking. Integrations with third-party tools for transactions are also patchy – many are read-only widgets, so two-way integration plans will need to allow for some development using LumApps' APIs.

Overall, LumApps would work for any mid-sized or large organisation seeking a flexible, feature-rich solution that can unify a digital workplace ecosystem into one branded user experience. The reasonable price point for smaller businesses makes it a viable shortlist option for them too.



### Summary table of scenario scores

NO.	SCENARIO/SCORE
1	User experience and visual appeal
2	Mobile and frontline support
3	Internal communication
4	Community and engagement
5	Information finding and knowledge management
6	Admin experience and governance
7	Analytics
8	Digital workplace integrations
9	Microsoft 365 integration
10	Wildcard

### **Pricing**

PRICE BAND	
250 users	\$\$\$\$\$
1,000 users	\$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price band based on number of users

#### **PRICING NOTES**

Price includes: Project workshops, training for admins, customer success services, maintenance, product support, branding / theming services, updates and upgrades, hosting, onboarding user data, access to a community & webinars, consulting services. – LumApps have three standard packages: Business, Professional, and Enterprise which comprise an increasing scale of feature functionality. There are also product and service add-ons and Customer Success options.

### Key benefits

- LumApps news management and general content management offers plenty of flexibility and is
  easy for editors and administrators to use. There is even an option to use Microsoft Word Online
  to author and publish content directly to LumApps.
- The branding / theming options are well-rounded, which create attractive sites and support personalised multi-brand scenarios.
- LumApps communities have powerful capabilities and are very versatile on desktop and in the native mobile app.
- The mobile app experience is highly configurable by clients and multiple experiences can be provided for different employee segments quite easily.
- LumApps Play provides a well-featured corporate video platform (an optional extra but included in the pricing for this review).
- The experience for end users and admins is excellent, we particularly like the extensive use of drag-and drop to rearrange page elements.
- The campaign tool, LumApps Journeys, gives potential for a personalised sequence of communications, such as on-boarding a new employee.

### Improvements and considerations

- We'd like to see a more integrated dashboard for content editors to see and manage their own contributions.
- While community spaces work well, more could be done with polls or ideation features.
- LumApps pricing is closely related to configuration, and savings can be made on the price band quoted for customers that don't wish to have the Play and Journeys modules.
- · LumApps Journeys shows promise, but has not yet been integrated into the suite.



### **Product type**



### **Branding opportunities**

All branding, complex options

### Target businesses



**SMALL** less than 1,000 people



**MEDIUM** 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

### Base systems









**Fully** standalone

Requires SharePoint Optionally works with SharePoint

Other\*

### **Sectors**







Business, consulting and management



**Engineering and** manufacturing







Retail

### You may also be interested in...









<sup>\*</sup> Optionally works with M365 and Google Workspace

# **COMPANY AND PRODUCT**

### Company details



#### Company LumApps



### Company founded

2015



#### Company locations

Lyon, France (HQ), USA, Canada, UK, Japan, Germany



ISO 27001 certified

Yes



Typical client size

20,000 employees



# Largest deployment so far

300,000 employees across 10+ countries



#### Partner locations

USA, Canada, UK, France, Japan, Germany, Spain, Italy, Belgium, Netherlands



#### Customers

Clients include: Servier, FinishLine, Publicis Sapient, Palo Alto Networks, ThoughtWorks, Japan Airlines, FM Logistic, Veolia, Springer Nature

### Product and technical details

Name of product	LumApps
Product launched	2015
Current version	10.22
Accessibility	Individual users can change the font size of what they're seeing, Alt text is in use for images, keyboards can be used for navigation, LumApps support screen reader capabilities.



#### Deployment

Client on-	Client private	Microsoft	Amazon Web	Vendor-	Microsoft	Other*
premises	cloud	Azure	Services	hosted	365 tenant	

<sup>\*</sup> LumApps is a multi-tenant SaaS product that can be deployed on either Azure or GCP (Google Cloud)

#### **Data residency**

USA, EU, or Japan

#### Client data encrypted

In transit only	In transit and at rest	At rest only
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#### Authentication supported

Azure Active Directory ADFS	Open ID	Oauth	G Suite	Other*
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<sup>\*</sup> SAML

#### Search technology

Apache Lucene/ Solr	Apache Lucene/ Elastic	Microsoft	Vendor's own	Other*			
* Google Cloud Search, Microsoft Search, and Coveo (on customers domains)							

#### Document library sources integrated

Во	x D	)ropbox	Google Drive	SharePoint	OneDrive	Other
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#### SharePoint/0365 versions supported (if applicable)

SP Server 2016	SP Server 2019	SP Server Subscription Edition	SP Online	Viva Connections

#### Mobile app deployment

Google Play store	Apple store	MDM	MAM	Other
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#### **Reverse-out options**

The LumApps customer success team would work closely with an existing customer prior to expiration. Export API would be available for those choosing to move data.

#### Languages supported

Please see their website for details.

#### Machine translation

Yes - via the product

#### Right to left script

Yes

### Set-up and support

#### Set-up process for new clients

Deployment can be as little as three days with a LumApps platform pre-seeded with use cases and templates for customers to bring their content and get started. A typical LumApps custom deployment might be closer to 3 months with a discovery, recommendation, and build process.

#### **Product updates**

Continuous delivery with major features every 6 weeks.

#### Product update process

All customers are updated at the same time. Features are delivered behind a feature flag that customers can control. Features behind a feature flag follow this cadence: deactivated by default (customer or LumApps can turn them on), then activated by default (customer can deactivate as needed).

#### Technical support

LumApps provides all day, everyday customer support across regions and time zones with in-house LumApps specialists via an online portal. A customer can pay for premium support which guarantees a single point of contact and phone calls.

#### User community

LumApps has an annual customer event focused on best practices, industry insight, and their product and roadmap. There is also an online Customer Community where all customers can ask questions to each other and the LumApps team, learn tips and tricks, and get updates on upcoming and new features.



#### In their own words

LumApps says: "LumApps helps all employees in an enterprise to better communicate, foster culture and collaboration, and provide ready access to the tools and information employees need to be most productive. Our product personalizes each experience to the unique needs of each employee, from executives and managers to frontline workers. Our SaaS platform is designed to scale to the needs of today's largest enterprises and is accessible across any device or language, ensuring your entire workforce is connected and able to do their best work."

### Their view of the marketplace

LumApps says: "At LumApps, we know that employees are your greatest asset. The experience provided for them at work can be the difference between an informed and empowered employee that is happy and productive, or one that is frustrated and looking to leave. LumApps' employee experience platform enables, engages and empowers today's digital workplaces."

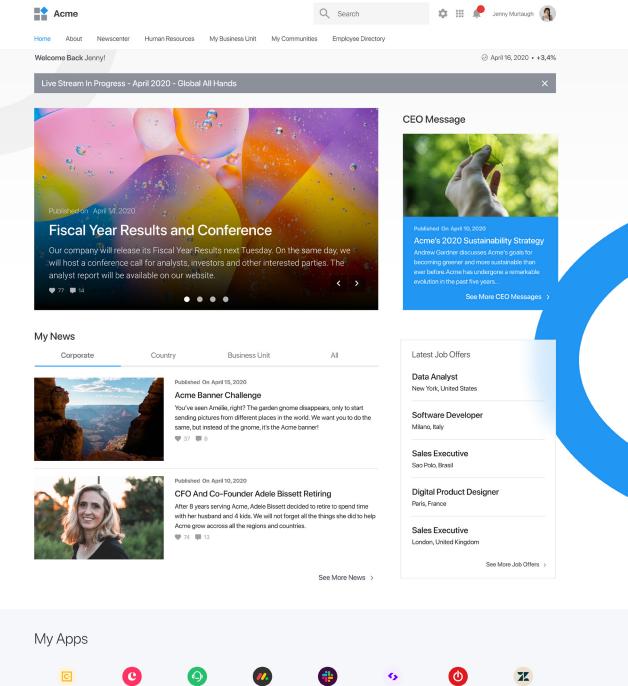
### Voice of the customer

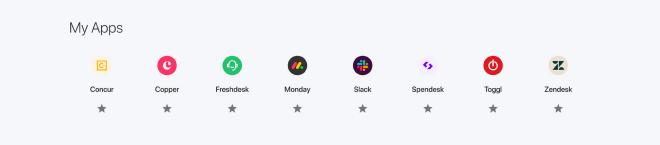
Multiple customers praised LumApps for the quality of the editor experience. "It's easy to create content, and the widgets are well thought through" said one. Another rated "Customer autonomy in the design and back office of the intranet" as a plus. Those managing more complex intranets also seemed to feel at ease with the features. One customer highlighted the way they could use metadata to create a customised user experience for each region, adding "I was even able to get a bit more granular and create a custom UX based upon market, so that...teams get content that is not only applicable to their region, but the market in which they serve."

LumApps' track record in working with Google Workspace were picked up by several customers too, though a shortfall in other integrations such as Workday was also mentioned. The community features, though praised, were also on customer wish lists to go further, with gamification features, for example. Other improvement requests often centred on governance and analytics. "[I'd like to see] improvements to back-end governance, security groups, and overall administration would make the platform easier and more flexible to use for content creators" said one. "Better analytics, as the current ones are very basic" added another. A third echoed this, wishing they could dispense with Google Analytics.

As a vendor, customers appreciated that "The LumApps platform is consistently adding new features that enhance the employee experience, and make communications easier and more effective." Other reactions were more mixed. One said: "We've had a lot of technical issues with our user directory and zero direct support from LumApps... It's a very disappointing experience". However, most reports were positive. "The vendor has been easy to work with in addressing our needs and questions" said one. "Excellent working relationship. We have carried out several co-construction projects, which ensures a great continuous improvement of the solution in line with our field needs. The customer relationship is very well taken care of by LumApps" said another. And a third said "the entire LumApps team has been fantastic. The customer success team to sales, to the technical support team, they have been supportive and adaptable".

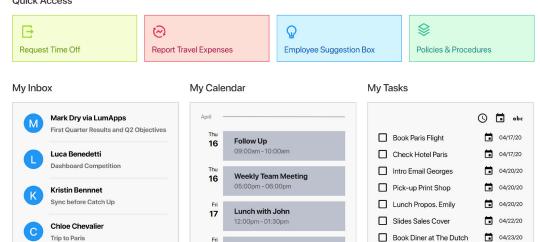






#### My Workspace

#### Quick Access



### **REVIEW**

### 1. User experience and visual appeal

score 4 LumApps has an appealing user interface with a modern feel and excellent options for configuration. We really like the tooltips that explain important icons and the help guides that give end users more details on how to use LumApps. We are less keen on the small app buttons on the top row and an additional side-panel for more controls as these add clutter and are likely to be overlooked. Customers can elect to remove these, however.

Content and navigation menus can be targeted to end users, for example by location or department, based on user profile properties and defined groups from Azure Active Directory, Okta, Google or an HR system. Dynamic targeting groups can also be created based on defined user profile property rules, giving plenty of flexibility. The navigation supports icons and subnavigation items are shown, cascading with a mouse-over. A mega menu is not available, and although LumApps works well without one we do feel customers would appreciate a choice. Breadcrumb navigation can be added via a widget. Within the content, navigation is supported with call-to-action widgets or quick link lists.

Notifications are a highlight, with an extensive set of controls for each user. This included the ability to set "do not disturb" times, and switch between the notification bell and emails for different types of activity, such as comments and mentions. Notifications are neatly aggregated into a notification centre, and this includes integrated third-party applications, such as Microsoft 365.

We were shown a range of branding styles that LumApps have created for customers, showing the platform's versatility to cover everything from very formal to fun and friendly. We like the fact that LumApps supports multi-brand scenarios, using profile-based targeting to give users the most appropriate brand experience. The branding options encompass logo, colours, borders, spacing, shadows etc. and can be applied per site or targeted based on the user profile. We were impressed at just how much can be done via the admin controls, without resorting to CSS coding.

### 2. Mobile and frontline support

score 4

LumApps has a stronger track record in supporting mobile and frontline use cases than many other platforms. The enrolment for new users (potentially without an email address) is well thought through, with neat touches such as a help section on the login screen called "Don't' know how to sign in?". A manager can even generate a QR code from within the app to invite a colleague to join. LumApps supports third-party identity providers like Okta, Microsoft AAD, or

Google Cloud ID. Alternatively LumApps' own identity management can be used. Accessing the

native mobile app with biometrics is currently not possible without respective third-party identity providers.

LumApps is fully responsive and can be used with any mobile browser, but it also comes with a native mobile app. Features and navigation can be the same as the desktop or have a specific navigation to better support mobile use cases. Changing the app buttons is a simple drag-and-drop operation for an admin. Search within the app impresses for the inclusion of all the refiners available with the desktop experience, though we missed type-ahead suggestions, which only work with people search.

We also like the fact that the configuration can be personalised for different user groups – so that for example, depending on roles, end users can have a different user experience including navigation items and content. However, reference content and links to external apps are bundled under a generic 'Explore' button, and whilst this is compact, it lacks the slick visual appeal of other sections.

In-app branding of the mobile app is possible and encompasses logo, main and secondary colours, and the branding can also be personalised for different user groups to support multibrand scenarios. Organisations with MDM can give the app their preferred name. Be aware that widget-based third-party integrations also work in the mobile app – but in a web view, rather than native.

### 3. Internal communication

score 4

LumApps has a good combination of quick-publishing and more sophisticated options to meet the needs of occasional and full-time communicators. Creating a news item is template-driven, to help with consistency of layout and metadata. However, these defaults can all be overridden, and the full complement of widgets is available to add to news stories, including videos, surveys and files.

Targeted news articles show up on the home page or landing pages for those specific user groups. News articles can also be marked as 'featured' with a start and end date to show up in specific widgets that can be placed on any page. News articles can be categorised by metadata such as topics. Topics can be followed by end users, as well as communities, sites, or other people.

The same capabilities extend to reference pages too, with very flexible options to make content visible only to selected audiences, to request 'mandatory read' acknowledgement and push out notifications when a page changes. Publishers can't create audience groups on-the-fly, however.

Publication start and end dates can be inserted or default values can be predefined to templates to support content lifecycle management. If required, publication workflows can be implemented to support use cases such as approval before publishing. A content overview shows publishers all their published, unpublished, and expired news articles.

Crisis communications can use 'alerts', a specific content type that has a predefined template and can be audience targeted. Alerts appear on the home page as a banner, which we feel are quite subtle so could be overlooked but push notifications can help.

Communicating across channels is possible, for example by sharing a news article directly into Microsoft Teams or Slack. A newsletter functionality allows publishers to build and send out newsletters with editorial content and / or existing content to defined user groups right within LumApps.



A new communication campaign feature helps plan and execute a series of broadcasts across multiple channels supported with goal setting and analytics. The first iteration of this handles email 'broadcasts' to defined audiences at a specific time. A simple form allows editors to create the message, choose audiences from a pick list and select when the message should be sent. One nice feature we like is that AND/OR rules can be set up to dynamically create an audience segment, and the tool will calculate how many people will receive the message.

### 4. Community and engagement

score 3

Communities have always been a big part of LumApps' approach, both for small private groups and large, company-wide conversations. Communities are fully integrated into the overall user experience including the native mobile app. Several content types are now available in communities. Simple posts can be created for information, an event, idea, and question, and posts can include tags and @mentions. More advanced features are included too, such as on-the-fly

translation and the ability to attach videos. The post interface and feed timeline look very similar to consumer social media platforms so should be familiar to users, although the range of reactions is limited to a 'like' button, which is a little disappointing.

Communities can be set to be moderated, meaning that only specific users can create posts and everyone else can just comment or like. Any end user can report a post. Prohibited words can be configured to block content in posts from being published.

In contrast to the social experience on many other platforms, communities in LumApps can also have a well-structured entry page, so visitors don't just see threaded discussions, but also structured content such as documents, quick links and expert articles. This gives the potential for the platform to more strongly support the original concept of 'Communities of Practice', where contributors curate and showcase a body of knowledge.

For employee feedback, a lightweight survey widget is available along with a snap polls widget. More complex forms can be integrated, for example by embedding Microsoft Forms or Google Forms. For idea management and employee suggestions, the Communities toolset is versatile enough to do a good job, for example with the ability to upvote and downvote ideas as well as comment on them.

There are no dedicated features to engage new joiners or other specific user groups of an organisation, but much of this need can be address with existing tools and suitable content, such as dedicated onboarding communities. We also feel that individual blogging or a personal timeline could be better supported.



### 5. Information finding and knowledge management

 $\frac{1}{3}$ 

The LumApps information finding experience is good, starting with the global search box at the top-centre. A search history (previous searches and results) is shown before typing a new search query but there are no search suggestions. Natural language processing checks spelling while typing a search query.

On the search result page, filters are available by content type and within a content type vertical by the respective metadata. Metadata can be created and managed in the settings by global admins (on the platform level) and by site admins (on the site level) with a simple user interface. Refiners (filters) on the search result page are dynamic, based on the search results. Refiners can be managed in the settings by global admins. Promoted results can be configured and are shown at the top in the search results, but other changes to the search results page will require CSS skills.

LumApps native search is powered by Elasticsearch. All native LumApps content is indexed and searchable, along with Google Drive and OneDrive content. However, the Elasticsearch only indexes metadata of .pdfs, but not the content itself. It's also possible to use alternatives such as Microsoft Search, Coveo or Google Cloud Search. In that case the respective third-party licenses are needed and although the front-end experience will remain the same, the way results are presented will depend on the chosen search engine.

People can be searched for via the global search box as well as through the user directory. Users can search for colleagues through any profile data, such as skills, making it a powerful way to locate experts. There is an expandable org chart view, although this is rather basic.

For managing and structuring knowledge there is a specific 'knowledge base' content type; but there are no specific features such as FAQ or accordion widgets available. LumApps can define content-type search experiences for documents, such as policies, with the results display and filtering options configured accordingly. Through this it's possible to create something quite advanced, such as an <a href="mailto:example on LumApps">example on LumApps</a>' own <a href="website">website</a>, this will take some configuration and time.

### 6. Admin experience and governance

SCORE 4

LumApps offers multiple layers of admin rights, making it possible to manage multi-site and multi-brand intranet experiences with granular governance controls. The admin controls remain clear and logical. For example, setting roles and permissions follow the logic of "who (user groups) can do what (content types) for which target audience (user groups)". However, we would have liked to have seen the inclusion of workflows to manage elements such as site requests.

The layout of the home page and other pages is split into different sections that can be populated by widgets to give a broad range of functionality. The widget library is extensive and includes an alert banner, hero carousel, 'my news', highlighted communities, feed with latest community posts etc. Widgets can be moved around into different sections with drag and drop, but we would have liked an easier way to preview each widget from the gallery selector.

For producing content, a neat feature is that articles can be created in Google Docs or



Microsoft Word Online and published directly to native LumApps pages. This approach means that teams can take advantage of Docs and Word collaboration features such as version control.

Content lifecycle management for pages is supported by expiration date, publication status (draft, published, archived, expired) and content editors receive notifications about expired pages. A content editor can go to the administration area to find a list of all their created content by content type. Here they can complete actions such as checking the page status or copy / reuse content. Although this is helpful, we feel that the presentation could be improved so that it was more than a simple list, or it could be evolved into a dashboard.

Multi-language for content, navigation, web user interface and mobile user interface can be defined at the site level. The structure of the navigation can be different by language too, and both content and metadata can be translated. Multilingual content can be published either via machine translation or manually translated, however there is no specific workflow that supports manual translation.

### 7. Analytics

SCORE 3

LumApps provides attractive and simple analytics for different levels (platform, sites, content, video, and communities) that are visible depending on the user role (global admin, site admin, community manager, content editor). The analytics offer drilldowns for definable time frames and filters for user group properties. However, other kinds of reporting need to be done via an exported dataset, rather than by configuring the tool, which seems a

shame. LumApps say that new dashboards are due soon, and the option to use other visualisation tools such as PowerBI and QlikSense are supported.

Content analytics has been improved in the latest version to provide aggregated traffic for sites in addition to the existing per page data. Filters can be used to select a time period, publication time and content type. The content type filter enables admins to focus on specific content such as news, knowledge articles or blogs. The reports cover views, visitors, likes and comments. There is also a 'Top Content' table that shows most popular content and can be sorted by metrics such as views, visits, comments and likes.

We liked a "Notification funnel" report, that tracks user journeys through to actions such as playing a video. Otherwise, there are no specific analytics for news such as reporting for a communication campaign, however, and we didn't feel that internal communicators would see the reporting as intuitively actionable.

Community analytics are available for community managers and cover active members, participating members, onboarded members, followers, new posts, new reactions, average connection time, user connection frequency, devices per community. Furthermore, there are site analytics and platform analytics available that cover active users, contributing users, new content, new posts, new reactions, average connection time, user connection frequency, and devices.

Analytics include mandatory reads, which shows a list of all the users who have acknowledged reading the content, but not who hasn't. When a piece of content includes a mandatory read action there is no built-in notification, this has to be created separately by the publisher which we feel is a missed opportunity. Finally, search analytics are basic, showing only the most popular search terms.



### 8. Digital workplace integrations

SCORE 3.5

As may be expected, basic integration methods such as iframes and embed codes are all supported. LumApps also offer access to API's so that developers can pull / push information when integrating with third-party systems. The list of off-the-shelf integrations is decent, including Salesforce, ServiceNow, Jira, Workday and Zendesk. Most widgets are one-way, but multiple widgets are available for the same system. For example, a widget

exists to see ServiceNow tickets, and another is available for users to submit tickets into ServiceNow.

Similarly, there are integrations with collaboration tools that cover Awesome Table, box, Monday, Slack and Zoom. Integration with Google Workspace is well supported, as LumApps has a long track record of working with the Google (formerly G Suite) platform.

LumApps has added an SAP SuccessFactors connector that enables user profile provisioning from the HR system, in addition to the existing Active Directory option. The process to set this up looks very straightforward with a simple tool that enables profile fields to be mapped between SAP and LumApps.

From an end user perspective, digital workplace integrations can be nicely integrated into a personal 'dashboard' view, where a page shows the user content from all the integrated applications. See the Highlights section for more. The available native widgets or custom developed widgets all support authorisation, user synchronisation, and styling / theming. Widget-based integrations also work on the native mobile app in a web container, although may take users into the third-party system rather than complete the action in the LumApps app.

LumApps native search is powered by Elasticsearch that can also index non-LumApps content. This content is shown on the search results page in an additional filter, which includes document library content plus integrated systems like Jira. It's also possible to use another search engine, namely Microsoft Search, Coveo or Google Cloud Search, instead of Elasticsearch where desired.

### 9. Microsoft 365 integration

SCORE 3.5

LumApps isn't comprehensively integrated into Microsoft 365, but it does some worthwhile things very well. The most practical element is probably that SharePoint and OneDrive folders and documents can be surfaced in widgets within LumApps, and that SharePoint search can appear as a tab on the search results page. If desired, the whole search engine can be replaced by Microsoft too. It's also possible to upload new documents from LumApps

directly into the respective SharePoint site. However, SharePoint pages aren't integrated into LumApps, and there's no consideration for SharePoint news content.

For Microsoft Teams, LumApps has the ability to surface Teams conversations in a widget. This could be valuable, for example, in communities where frontline workers lack licenses, so a Teams widget provides a way for desk workers to manually cross-post into communities. Sharing into Teams is also facilitated – for example, you can click on a news story and choose to share it directly into multiple Teams channels (not a capability SharePoint can brag about). A



personal Teams chat can also be initiated from a LumApps profile card. There is a simple way to embed a LumApps intranet as an app within MS Teams, a little like Viva Connections, although this did not seem to be a particularly comprehensive integration.

LumApps also provides some lightweight integration with Yammer, by showing defined Yammer content as a feed within a widget. Furthermore, Microsoft Planner plans or Stream videos can be embedded within a widget. Microsoft applications can also be opened via the LumApps app launcher that is accessible through an icon in the header.

#### 10. Wildcard

SCORE 3.5

LumApps Journeys is a campaign automation tool which the company recently acquired. Its maturity as a stand-alone product is impressive, but it does mean that at the time we saw the demo it wasn't really integrated into the rest of the platform.

The concept behind journeys is that you can create a personalised, automated sequence of steps for employees to go through, typically HR scenarios though the tool could be applied more broadly.

LumApps demonstrated an onboarding journey that combines several elements such as email, checklists, templates and analytics really well. We liked the dashboard for managers that clearly shows overall progress, for example. Please see the Highlights section for more.

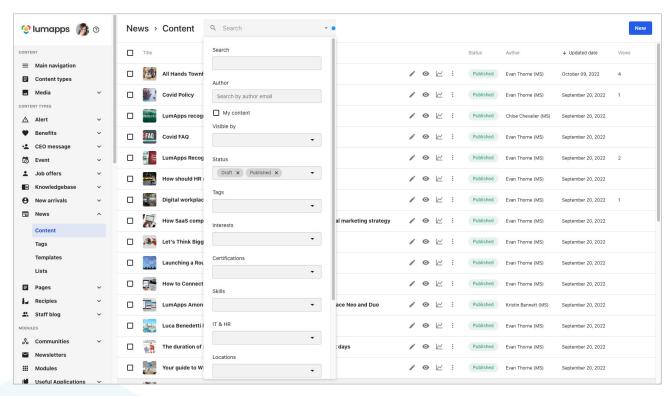
Altogether, LumApps Journeys makes a lot of sense as a component for an employee experience platform, and we look forward to seeing the integrations evolve over the next year. In particular, we'd like to see the LumApps styling applied to the interface design (this is underway), and thought given to how other LumApps capabilities could be leveraged, such as the use of Communities for onboarding and assistance-seeking.



# **PRODUCT HIGHLIGHTS**

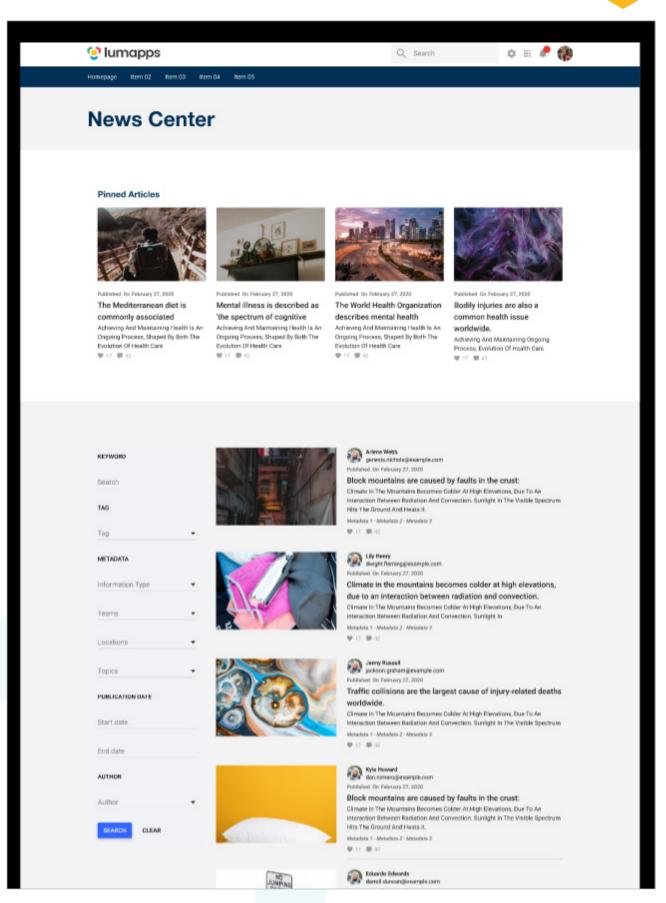
### News management

LumApps news management, and content management in general, offers plenty of flexibility. Internal communicators will appreciate the different news article templates, the way content can be laid out by using different widgets, and the many options to display news teasers or feeds on the home page or any other page. It's also easy to create a News Centre that displays news articles in different ways based on metadata criteria.



News editors can manage their news in the site administration area.



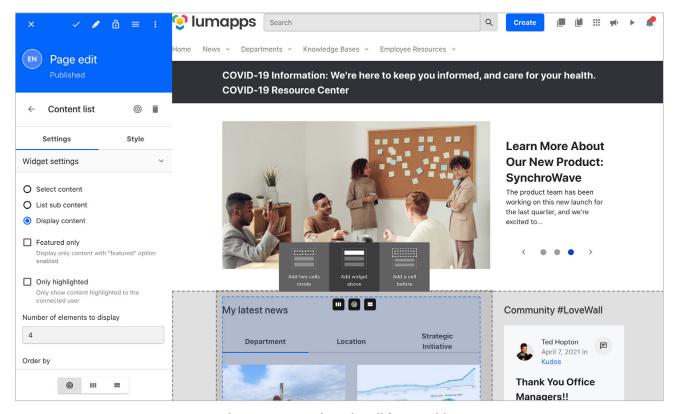


It's easy to create a News Centre (or more than one) that displays selected news articles in different ways based on metadata criteria.



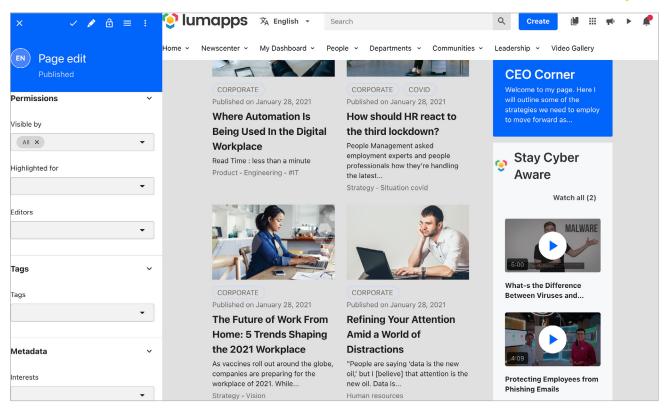
The editor experience to create and edit news is simple, allowing communicators to easily and quickly create content based on defined news templates. When creating a news item, various metadata to categorise, audience target or highlight a news article can be inserted. It's also possible to choose whether specific user groups should receive a notification once the news has been published. Users can machine translate a news item too if they wish.

There are some powerful additional features that are less commonly found too – such as publishing on behalf of someone else, setting focal points in images so they re-size correctly, and choosing to highlight an article just for a particular audience.



Laying out content by using different widgets.



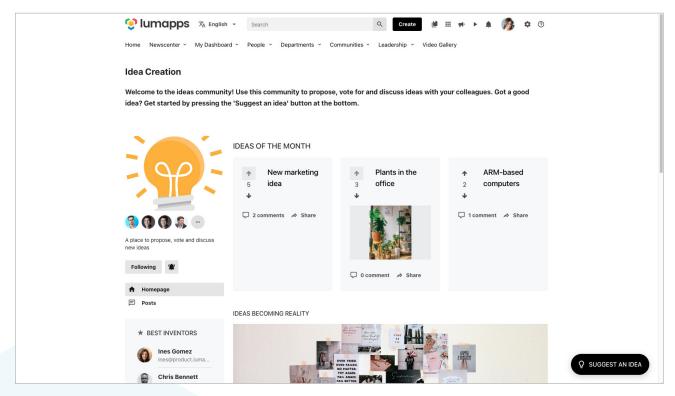


LumApps' news editor makes it easy to set audience permissions and highlighting.

### Social intranet and communities

LumApps features and functionalities power many common social intranet and community use cases seamlessly in one single solution. For example, end users can interact and engage with content by commenting (with @mentions), liking, sharing, or following. This is matched by capable moderation tools, such as "mark post for review" and pattern-matching algorithms that will intercept sensitive posts, for example if a credit card number is shared.

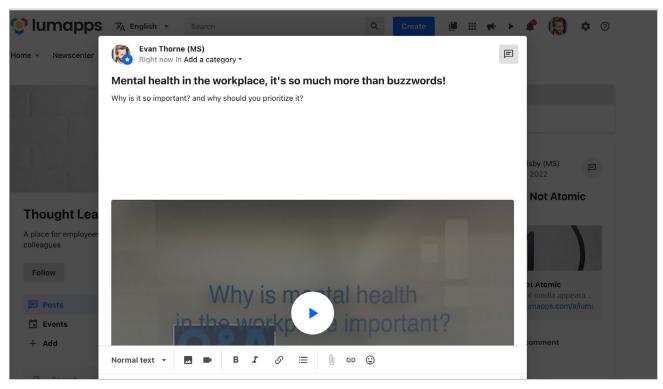
LumApps communities have powerful capabilities and are very versatile, providing a structure for communities of practice and communities of interest. Helpfully, they are fully integrated into the overall LumApps user experience, including the native mobile app. The layout of the home page of a community is flexible and can be tailored to the purpose of a community with a variety of widgets. Community admins can configure a specific navigation bar that enables members to move between content types such as posts, videos, external content, and a new file library feature too.



Community home pages can be tailored with a variety of widgets and a navigation bar.

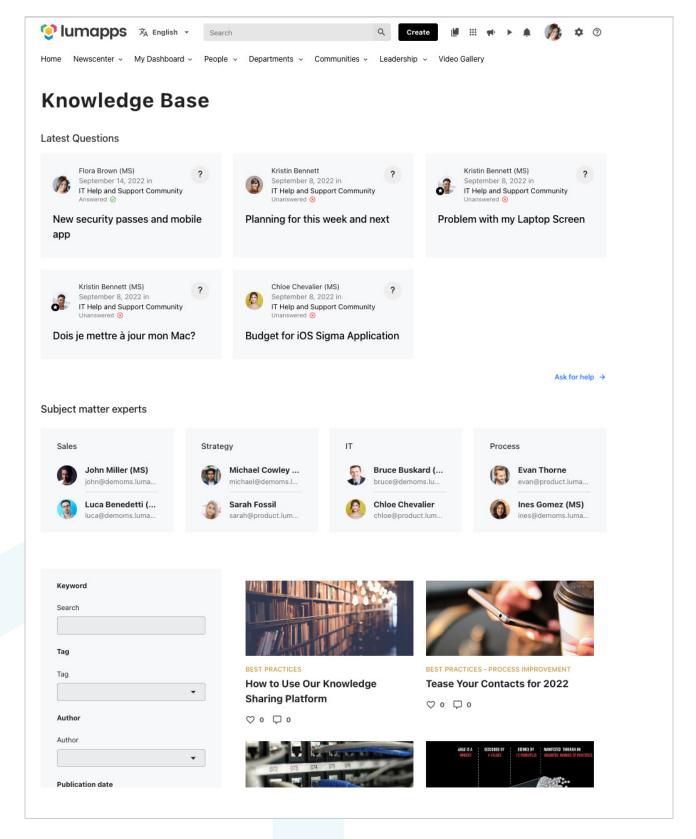


Communities support several content types. Alongside simple posts there are events, ideas, questions and a new 'article' type for more detailed information.



Simple posts support consumer social media features like hashtags and @mentions.

We liked the way that a community page can be designed to highlight high-quality resources too. For example, it can include a 'knowledge base' of best practice articles, a list of subject matter experts, and a Q&A area where the best answer can be highlighted.

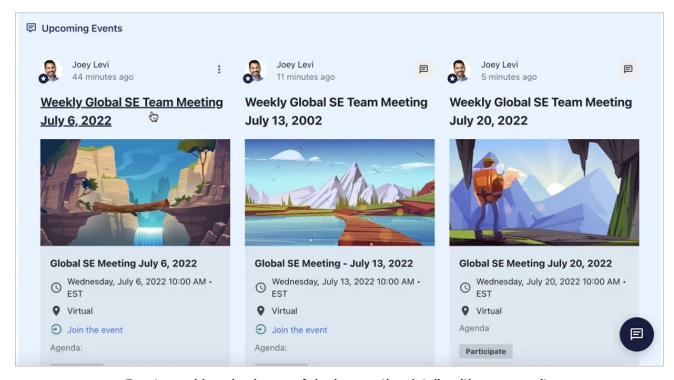


A community can have an associated knowledge base of curated content.



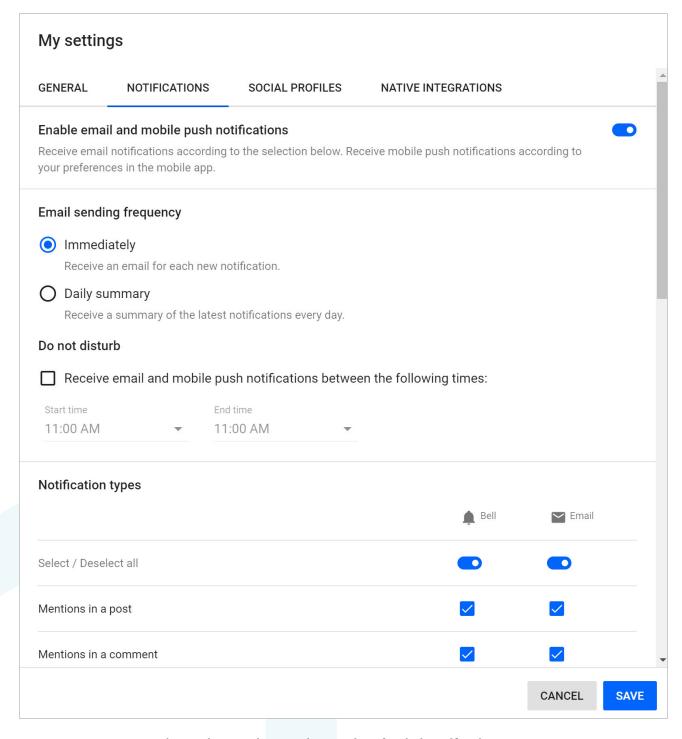
A file library provides simple document storage and sharing for non-native content (e.g. Word, PDF etc) although the content of these is not indexed by search. More complex document management can be added via third-party integrations for Google Drive or SharePoint document libraries to display documents that are stored there.

Communities also include an event content type, which is a simple way to share event details such as date, time, location and agenda with a community. Community members can add the event to their calendar and see who else is attending. Event details are security trimmed for the community, so for 'all company' events this could be via an 'all company' community that everyone is automatically a member of.



Events provide a simple way of sharing meeting details with a community.

Interactions in communities (and elsewhere) trigger notifications that show up in the end user's notification centre, and users have a good level of control over how these are managed. Finally, social advocacy functionality allows 'ambassadors' (defined end users) to share specific content to their personal social network on social media platforms, with LumApps cleverly taking care of firewall issues by making selected content available for sharing.



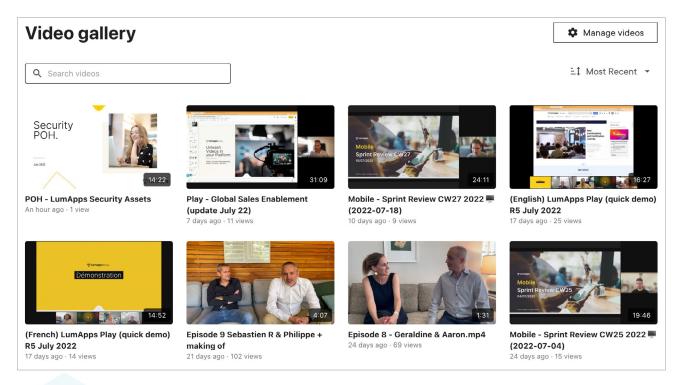
End users have various settings options for their notification center.



### Secure video platform

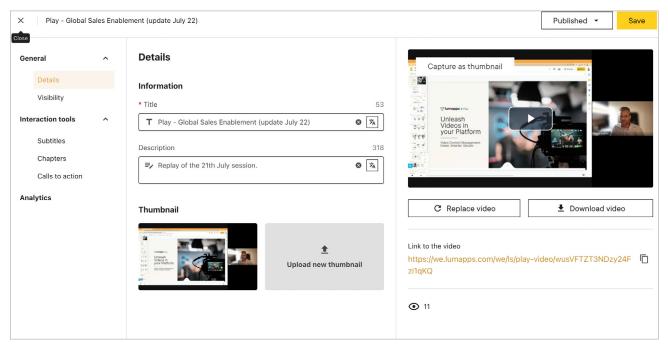
LumApps Play is a well-integrated video capability. LumApps Play provides a secure corporate alternative to YouTube or Vimeo, so videos can only be viewed through LumApps and can't be shared externally.

The video gallery provides thumbnail previews of videos in the platform along with title, duration, and number of views. There is also a search to help find specific content. The video gallery can be configured to show in the main menu of LumApps' mobile app as well. Videos can be embedded in published content or shared via a community post as you would expect. When viewed on mobile, an overlay feature means people can complete other tasks in the background while the video is playing.



The video gallery provides search and browse capabilities.

Admins upload videos via the video manager and then edit options for title, description and who can see the content. A video thumbnail can be added and there is a button to capture a new thumbnail from preview.



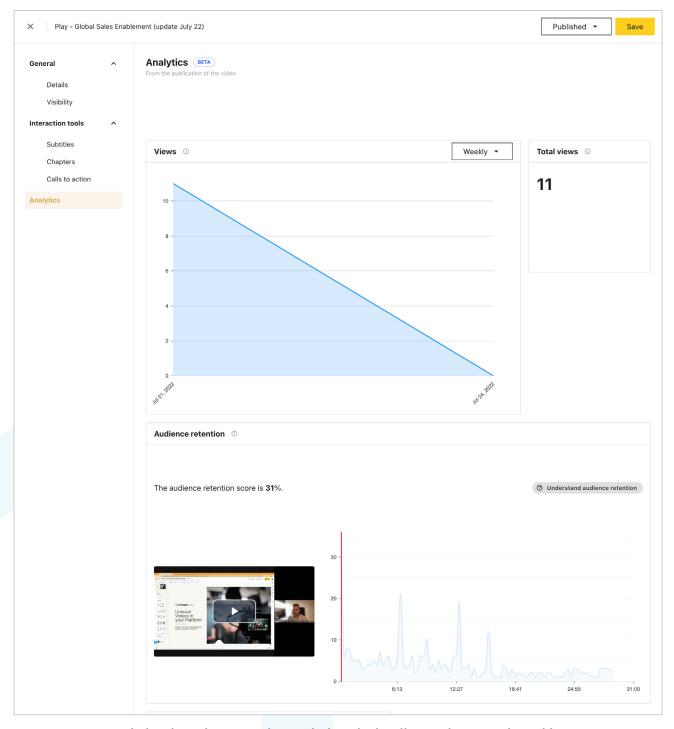
Video details can be edited and subtitles added via the video manager.



As with other content types, multiple languages are supported for text related to the video and this extends to subtitles as well. Subtitles can be automatically generated (using Google or Azure services) or manually added via SRT / VTT files. Play does not yet offer a hybrid approach of automatic generation and manual editing in-platform.

Chapters can be added to help people navigate through longer videos. Calls to action enable links to other content to be overlayed on the video as well.

Play comes with some analytics that shows the number of views over time where people dropped off while playing the video. The latter includes a neat animation synchronised to the video so you can see exactly what was happening in the clip when people turned off.



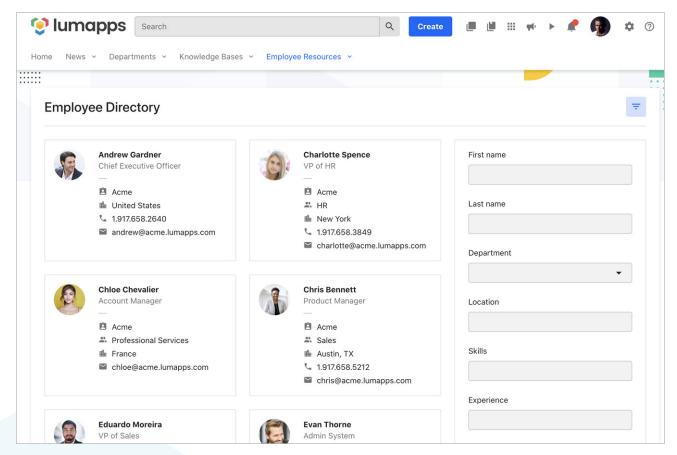
Analytics show views over time and where in the clip people stopped watching.



#### People directory

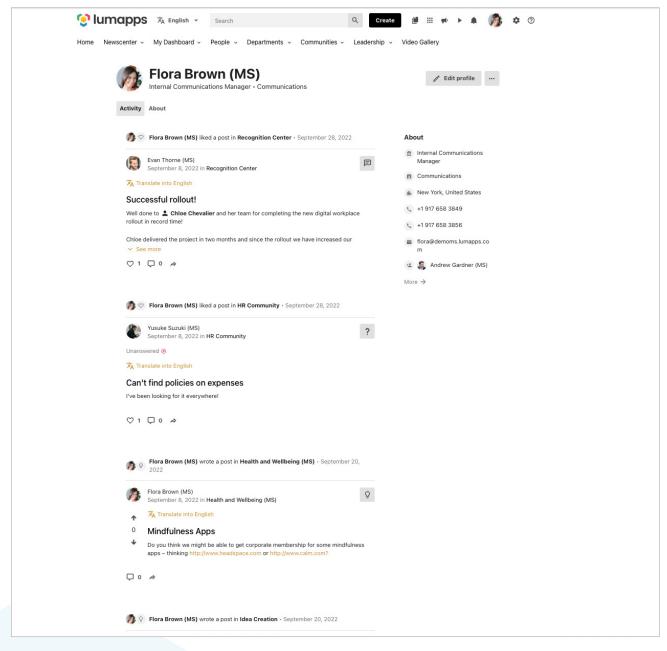
The people directory within LumApps is a well-designed, user-friendly application. Basic information is presented in an attractive card-based interface, with a powerful search and filtering window to the right of the screen. Here users can drill down further and search for colleagues based on department, location, or skills. The detailed profile of a user integrates well with an organisation chart showing the place of that person in the hierarchy.

Unusually, fields in a person's profile can be permission trimmed, for instance to hide the mobile phone number of an executive. Note also that a chat in MS Teams or Slack can directly be launched from the details card.



Finding users in the employee directory.





The user profile also shows an overview of recent activities.

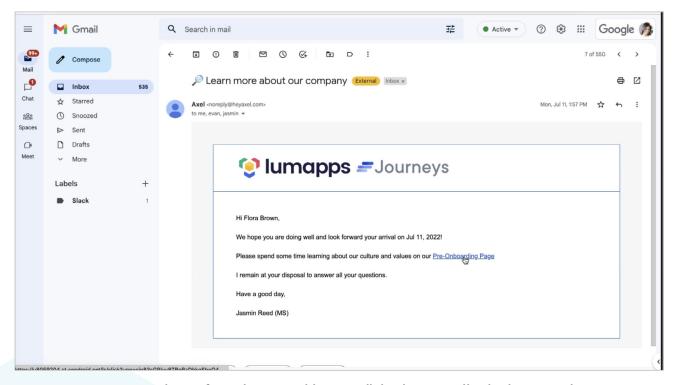


#### **LumApps Journeys**

LumApps Journeys is the latest optional add-on for the platform. Although the classic use case for such a tool is onboarding a new employee, it can be used for any multi-step activity, such as planning a trip to an overseas office, where visas, flights, airport transfers etc. need to be orchestrated.

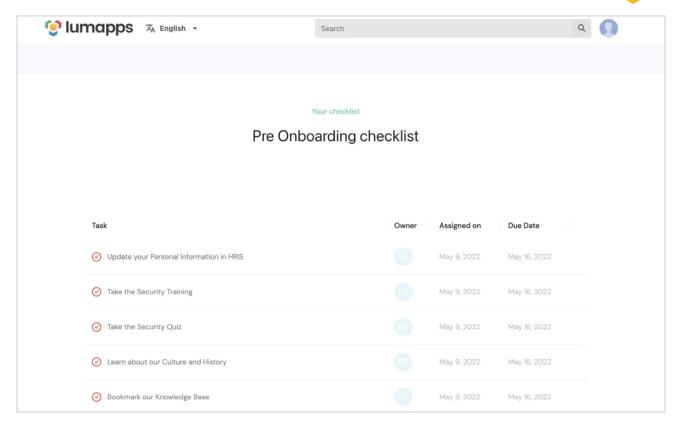
In the onboarding example, the journey begins with a manager filling in basic details about the new hire and selecting a suitable journey template. Each step can be sequenced and timed relative to other events, for example a laptop can be ordered 20 days before the start date.

The demonstrated sequence in turn generates a personalised email and a link for the new employee to see a to-do list. This highlights another uncommon capability of LumApps – some content can be set to be accessible outside the intranet for external users, partners and soon-to-be employees.



Journeys can be configured to start with an email that is personalised using a template.

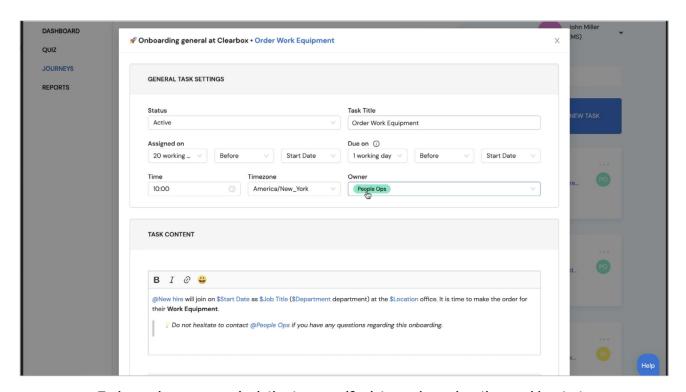




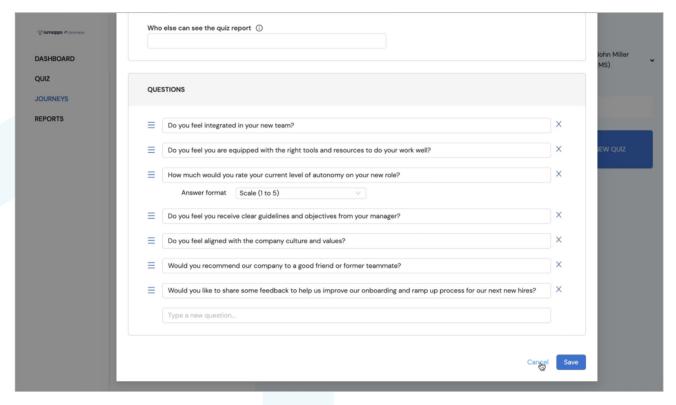
Users can be presented with a checklist to work through.



LumApps Journeys includes other neat features to automate things further. For example, induction meetings can be automatically created, and these will be entered into both the employee and manager's calendars. Quizzes too can be set up or used as a feedback survey. And finally, the hiring manager gets a dashboard to track progress against the whole plan.



Tasks can be sequenced relative to a specific date, such as when the new hire starts.



Journeys includes a quiz / survey tool.



# THINGS TO BEAR IN MIND

LumApps offers a very broad set of features and functionalities with lots of flexibility, although there are some gaps. The community features work well but features such as polls and personal timelines are lightweight. The analytics too, are not very well rounded at the moment, and buyers may need to factor in the use of other tools to create a more complete dashboard to manage their intranet, although this area has progressed over the last year.

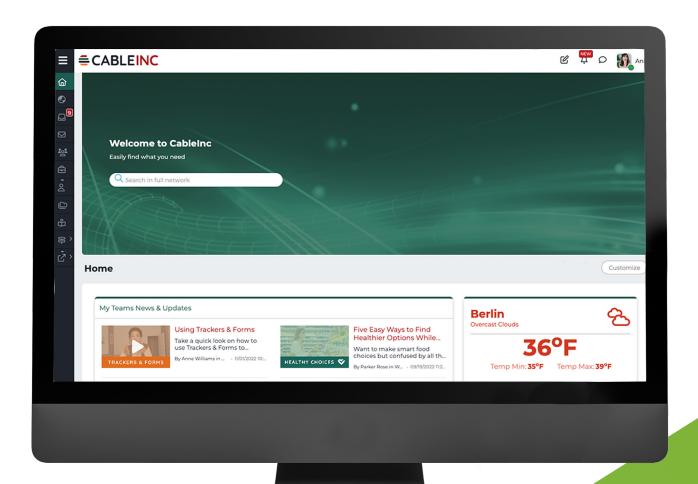
Some features like LumApps Play and Journeys are optional extras which we included in the price for review, but which can be omitted to bring costs down.

#### Why choose this product

LumApps will appeal to organisations looking for a versatile digital workplace hub with an attractive UX that works well across both desktop and mobile. Its configuration options, advanced content targeting and granular governance controls make it very well suited to more complex customers that need to serve a diverse set of audiences from a single platform. LumApps shows that it's perfectly possible to deliver a highly capable digital employee experience that is compatible with the Microsoft world, but which works equally well alongside other platforms, as well as offering a much more coherent social / community solution. Finally, it's worth highlighting that for businesses up to 1,000 users, all of LumApps' core features come at a very appealing price point.







## Our view in one tweet

MangoApps from @MangoAppsInc is a cost friendly, well-featured and customisable internal and external communication platform with a valuable learning management dimension too.



MangoApps is an independent intranet developed by MangoApps, headquartered in Washington, USA; the company was founded in 2008. First, their primary focus was on internal communication and enterprise social network, but in 2015 they released content management features as well, followed by team collaboration modules in 2017. Their latest, a learning management module, was added to the platform in 2020 and works very well.

MangoApps' intranet capabilities are well rounded. It has a strong social component that supports communities with plenty of fun ways to interact, including emojis, GIPHY and gamification. Notably, these communities can also be externally facing, for non-employee scenarios such as partner and franchisee networks. Mobile support is good, with several features that are more common in mobile-first products such as white-labelled apps, although admins will have to carefully choose what features to present to frontline audiences. Search is another strong point, being both fast and versatile, with the ability to index external sources and even text within images.

There are a few areas that could be improved, however, including the overall appearance that can feel a little boxy at times on desktop and where some of the default mobile views can feel busy. Integrations are provided for a range of M365 tools and other business systems, but this is not a stand-out area, primarily because MangoApps provides its own capabilities instead. Workflow for coordinating multi-language content and ways to communicate beyond MangoApps are limited too, which may disappoint businesses with a global workforce.

MangoApps say their average customer has around 5,000 employees, though some long-standing customers are much bigger. We can see how it offers a lot for the money for medium-size or even larger businesses and will appeal to organisations that need a rich feature set, particularly where they don't have dedicated systems. For companies that don't wish to go the SharePoint / Microsoft 365 route for their intranet, MangoApps offers a versatile alternative with a strong range of capabilities.



## Summary table of scenario scores

#### NO. SCENARIO/SCORE 1 User experience and visual appeal Mobile and frontline support 2 Internal communication 3 Community and engagement 4 Information finding and knowledge management 6 Admin experience and governance 7 **Analytics** 8 Digital workplace integrations Microsoft 365 integration 10 Wildcard

#### **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### PRICING MODEL

Subscription – price per user per month, Subscription – price band based on number of users, Store or Location based pricing

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, multi-year commitments, businesses over 20,000 users.

Price includes: Project workshops, training for admins, training for end users, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, hosting, onboarding user data, access to a community & webinars

#### Key benefits

- The Learning Hub is a strong feature that would suit those businesses without a dedicated LMS.
- The mobile app is easy to use, with a nice range of practical features, encouraging users to stay connected even on the move.
- Communication creation is well supported, particularly for urgent or crisis messaging.
- Information finding is strong across content and people search, with good governance features to support.
- The ROI dashboard within the analytics screens is unusual and helpful for getting the intranet return on investment conversation started.
- MangoApps has an extranet capability that may offer a valuable dimension to companies looking to deliver communities for dealers, franchisees, partners and similar where a secure platform is needed beyond the firewall.

#### Improvements and considerations

- Some elements of the interface look a little dated in their design, both on desktop and mobile.
- Although MangoApps provides integration to many applications, the level of integration is variable, and many are read-only or rely on iframes rather than round-trip interactions.
- MangoApps duplicates the functionality of some M365 applications and there are limited integration options with others.
- If you need a platform with multilingual capabilities, MangoApps is good at offering on-the-fly and machine translation assistance for authors, but there's no workflow to help co-ordinate language variants.



## **Product type**



## **Branding opportunities**

All branding, complex options

#### Target businesses



**SMALL** less than 1,000 people



**MEDIUM** 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

## Base systems







Requires SharePoint



Optionally works with SharePoint



Other

#### **Sectors**







Retail



Accountancy, banking and finance



**Engineering and** manufacturing



**Energy and utilities** 

You may also be interested in...









## **COMPANY AND PRODUCT**

## Company details



**Company**MangoApps



Company founded 2008



Company locations

Issaquah, Washington USA (HQ), India



ISO 27001 certified
Yes



Typical client size 5,000 employees



Largest deployment so far

50,000 employees



#### Partner locations

Please see their website for details.



#### Customers

Clients include: PetSmart, Raley's, Vitamix, TeamHealth, OU Health, Superdrug, A.S. Watson, Great Western Bank, Beneficial State Bank, OPW, symplr. Please see their website for more.

## Product and technical details

Name of product	MangoApps
Product launched	2010
Current version	16.1
Accessibility	WCAG 2.1 compliant



Deployment									
Client on- premises	Client private cloud	Microsoft Azure	Amazon Wel Services	Vendor- hosted	Micros 365 ter	()thor"			
* Google Cloud									
Data residency N/A									
Client data encrypted									
In transi	t only	In tra	insit and at res	t	At rest only				
Authentication supported									
Azure Active Directory	ADFS	Open I	D Oau	th GS	uite	Other*			
* All SAML providers									
Search technology									
Apache Lucene Solr	/ Apache Luc Elastic		Microsoft	Vendor's own		Other			
Document library sources integrated									
Вох	Box Dropbox Google Drive SharePoint OneDrive Ot								
* O365, AWS, SAN, Windows Servers									
SharePoint/0365 versions supported (if applicable)									
SP Server 2016	SP Server	2019	SP Server Subscription Edition	SP Online		Viva Connections			
Mobile app deployment									
Google Play store	Apple st	ore	MDM	MAM		Other			



#### Reverse-out options

All client data belongs to them and the MangoApps customer success team helps clients get all their data back (in CSV / XML / SQL formats). After the client has received their data, upon confirmation, MangoApps will delete their data permanently from their servers.

#### Languages supported

Chinese, Dutch, English, French, German, Spanish, Turkish. Individual users have the option to set a language of their choice in their individual account. Support for additional languages can be added upon request.

#### Machine translation

Yes - via the product

#### Right to left script

No

#### Set-up and support

#### Set-up process for new clients

Typical setup will run 6 to 12 weeks and includes project kick-off, setup and deployment, design and branding, and administrative and end-user training.

#### **Product updates**

On average, 4 times a year.

#### Product update process

For multi-tenant cloud, all product updates are automatically applied to customer accounts as they are released. Single-tenant cloud and on-premises customers have some additional control when product updates are deployed to their environment.

#### Technical support

MangoApps global office locations allow them to provide around the clock support by time zone.

#### User community

The MangoApps user community is accessible to all users through the platform. It provides a forum for any interested users to find product updates, answers, support and inspiration from other users.



#### In their own words

MangoApps says: "MangoApps is a modern employee experience solution for frontline and desk workers that comes packaged in an all-in-one company-branded employee app. It makes employees more engaged, teams more productive, and organizations more efficient."

#### Their view of the marketplace

MangoApps says: "MangoApps enables companies to maximize digital efficiency and productivity by empowering 100% or their workforce through a branded mobile-first work hub. Through tool consolidation and SSO integration, MangoApps presents employees a single dashboard to communicate, collaborate, access tools, resources, content, and training needed to perform their job at the highest level. With this architecture in place, our customers can deliver personalized communication and content, track content consumption, and reduce manual processes boosting employee engagement and providing actionable insights around all employee-facing systems."

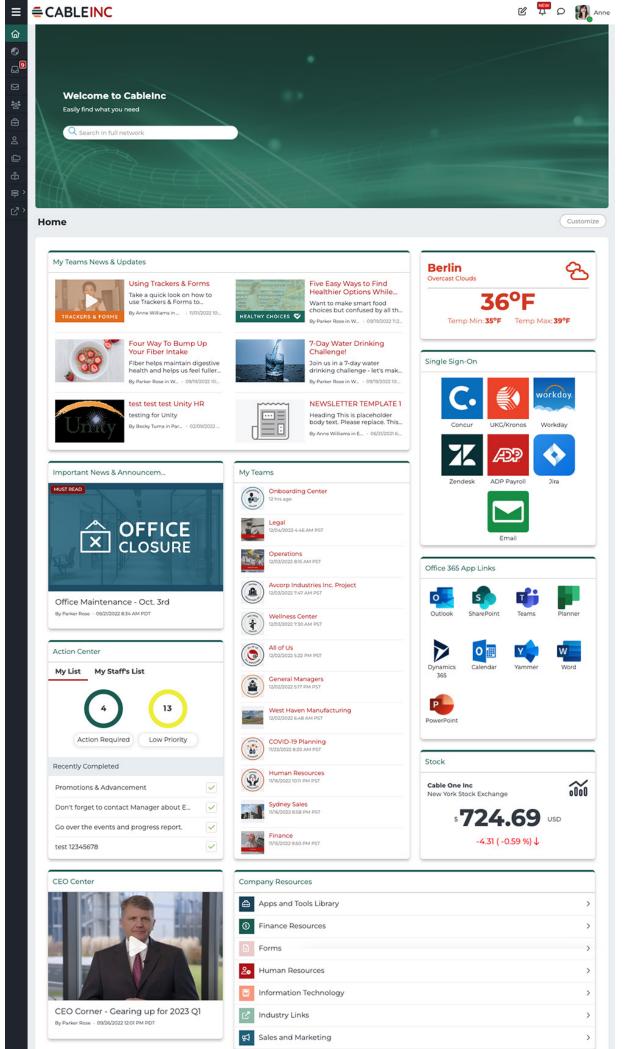
#### Voice of the customer

MangoApps' ability to "boost collaboration, organisation, recognition, and communication" across companies was a common thread among the feedback we received. The "ease of use by both end users and admins" was also highlighted, alongside the fact it's "intuitive" to use. The flexibility to customise the solution by "turning modules on and off" was also flagged as a real bonus of this platform, with one customer saying, "we were able to replace our old intranet, rewards & recognition system, and knowledge management system with MangoApps right out of the box... As our company continues to grow, we can turn on new features and deploy in new ways".

Feedback associated with changes to the platform were mixed, yet were broadly themed around improvements to existing functionality and UX. For example, one customer said, "further development of forms templates on their tracker module. Works great but would like to be able to design better presentation of forms". One customer requested "a more robust gallery option" and another added they are "working with MangoApps team to improve some functionalities such as trackers, recognition, IM and LMS modules". User permissions and the ability to customise yet further were additional requests. However, many of the people who responded ended by saying how much they like the product with one person saying, "this tool delivers everything I need plus more".

The overall experience working with the MangoApps team is extremely positive. Almost every customer feedback included either the word "excellent" or "awesome". They are all very pleased with the responsiveness to improvement requests, where one person said, They listen well and understand our needs. They follow up on every little detail including any enhancement request." Another customer summarised well: "The ability to connect directly to the Development Team at any time and ask for assistance or for new features is fantastic. The working relationship is excellent."





## **REVIEW**

#### 1. User experience and visual appeal

SCORE 3.5

MangoApps is a simple, straightforward platform that helps businesses to communicate, collaborate informally, and share information. The navigation is straightforward and displays key MangoApps tools by default; role-based targeting is also possible in the menus. In addition, the navigation can be customised, and custom links can be added. However, it's not possible to create mega menus that most users might expect from a modern platform, which we

think is a shame.

The notification system of MangoApps is particularly sophisticated. It can send notifications to the user on various channels (mobile app push notification, text message, Slack, and email are among the most common), but users have an option to refine which notifications are important to them and which ones have lower priority. The mobile app has a 'Do Not Disturb' option that disables all notifications, with the exception of crisis communication and critical notifications. The approach to notification management is unusual in this market and we think it works well.

The user interface is simple, clean, and uncluttered. There are branding options to customise not only the desktop environment, but also the icon, display name, and the look and feel of the mobile app. It is possible to create sub-brands inside MangoApps for different user segments (for example by geographical region). MangoApps is certainly capable of some versatile styling and layouts for pages with its branding and customisation options, however, the default tends to be rather boxy and may look a little dated to some.

#### 2. Mobile and frontline support

SCORE 3.5

Accessing the MangoApps mobile app is straightforward, which users can download from the usual app stores. With its branding features, the name of the mobile app can be white labelled with its own icon, providing a tailored employee experience. Initial onboarding and enrolment are supported by multiple routes, including the options of a QR code which points people to the specific app to download. There are various login options, beyond email, and

biometric authentication is supported. The device management features in MangoApps are also more advanced than most intranets with a mobile app; for example, administrators can disable or retire specific devices when needed, and perform a remote wipe.

Administrators can control home page widgets to suit smaller screens, for example hiding some elements that would appear on the desktop. The navigation is configurable by admins too, allowing users to access news, announcements, libraries, e-learning content, and many more features. There is a people directory, where colleagues can be found by any profile data. The search is comprehensive (see Scenario 5), although returns results that may be too detailed for



a small screen experience. A quite unusual feature is the 'Vault', where sensitive documents can be shared securely with individuals, such as pay slips, tax documents, HR documents, etc.

The app provides practical support for frontline users via integrations, such as shift scheduling through a workforce management tool like ADP. There is a 'Learning Hub' module to support organisation-level learning management, and end-user training (please see Scenario 10). Frontline users will particularly appreciate being able to set their mobile notification preferences on a very granular level – please see Scenario 1 for more details. A 'messaging' feature for those without corporate email addresses and a 'chat' tool for less formal conversations are also helpful for frontline workers, although using both may be confusing.

While the mobile app has a number of great features, the presentation of content is variable. Features such as people search, user profiles, and the work schedule are displayed in a very user-friendly way, but news and search results don't always make the best use of a small screen environment.

#### 3. Internal communication

SCORE 3.5

MangoApps provides a rich editor interface, as well as a wide range of built-in content templates to help internal communications. These templates can be used to create pages, newsletters, weekly or quarterly status updates, job openings, and much more. If the out-of-the-box template library doesn't meet what your team needs, custom templates can be created with help from the vendor. Special reference pages can even be created automatically, displaying

aggregated information from across other parts of the intranet to create a single destination for related topics, regions or departments, for example.

Page creation is straightforward, where publishers add blocks of content to create the page as desired. Approval workflows can be applied when creating or editing pages. MangoApps allows publishers to target communications to specific audiences based on user segments or team members, so that only relevant information is shown to individuals. Helpfully, these audiences can be created on the fly with dynamic rules rather than relying on pre-defined groups or security settings.

One feature that might be missing for some Communicators is that there is no planned publication calendar view (MangoApps tell us this is due by the time this report is published). Currently, the Communications team is supported by an intelligent 'smart scheduling' feature. When this is switched on, MangoApps claims that content will be automatically sequenced so that end users can avoid information overload.

High priority content can be presented as a 'must read' item; when a user reads content with this setting on, they must acknowledge that the content is read and understood. A neat touch is that if the article is not acknowledged by a user within two days it will be 'boosted' to move higher up the newsfeed stream. For truly urgent communication, publishers have a flexible set of options, including the ability to generate SMS messages, web pop ups, banners, emails, and mobile alerts.

In addition to intranet pages, MangoApps has an email digest capability. This automatically compiles summaries from sources such as social posts, tasks, and unread chats. There is a useful digest preview, but we didn't see options for editing the layout. Although publishers can set the frequency, we liked that users can also influence this in their preferences.



#### 4. Community and engagement



score 4.5

To support end user engagement, MangoApps provides a range of community features, including the ability to add posts (even by email) into activity feeds. To encourage conversation further, people can add replies to posts and articles and include a GIPHY or a emoji. Helpfully, people are able to flag comments for review, which will remove the comment until an admin has checked it.

People can give and receive recognitions and rewards for their work contributions, helping to create a positive and supportive atmosphere that encourages further participation on the intranet. We liked that awards can be connected with company values, too. MangoApps also supports celebrating successes, one example that particularly struck us is the celebration of a work anniversary via a 'story collection' – please see the Highlights for details.

MangoApps has strong survey and poll capabilities, with extensive reporting and analytics tools, giving admins valuable insights about the results. Surveys can have various types of questions, including single and multiple choice, opinion scale, star rating, text, etc. The creation is simple, using familiar survey building features that work well. Another useful tool is an ideas board that allows employees to submit ideas and feedback on topics. The idea can be shared with one or multiple teams, and voting and workflow options are supported to help process ideas.

Notably, the capabilities mentioned above are available for both internal employee communities, as well as partner and customer communities via an extranet. For example, MangoApps uses their own platform to provide a customer and partner home page, acting as an authorised extranet. Besides providing a channel to communicate with all partners and customers, MangoApps makes it possible to provide every partner company with their own workspaces, so the communication can be focused and segregated. When combined with the survey tool for gathering feedback, or with the ideation feature to capture development suggestions, the extranet feature becomes a comprehensive tool in its own right.

#### 5. Information finding and knowledge management

SCORE 3.5+

The search engine behind MangoApps is based on the popular open-source search engine, Solr. With its search capabilities MangoApps claims that the platform's search is notable for the speed at which it returns results. People are able to find content within the organisation as well as across integrated sources.

The search results page presentation is the classic 'linked headers with summaries' experience. Customising the search UI is part of the initial

deployment process, including the filters, allowing businesses to tailor it to branding and needs. This means a solid user experience is available from the beginning, however, it might be challenging if any UI updates are needed in a later phase. It is possible to change some metadata weight settings for rankings, to help fine tune the relevance of results. However, this option is rather basic compared to other advanced search applications. A helpful feature is auto-tagging, which enhances search and findability by using AI to suggest possible tags. This is helpful when building reference pages – see more in Product Highlights. A 'pinned' feature and search history are also helpful for returning to previously opened content.

To support knowledge sharing, MangoApps has a 'Libraries' feature that enables the creation of hubs where content can be organised around specific topics, such as finance resources



or cross-departmental forms. However, we found the presentation of libraries rather plain compared to other parts of the platform. For those that need it, MangoApps actually has a viable document management system built-in. Working like other cloud drive tools, it has the ability to sync to a hard drive for offline access, share individual files and folders, and so on.

Finally, MangoApps includes a well-featured people search capability. Users can choose to see results as a gallery, list, or an org chart, and apply filters such as department and role. The ability to add multiple filters in one query makes it particularly powerful. We also like the ability to add a pre-filtered search result to a page, for example to include a 'meet the team' widget on a department page.

#### 6. Admin experience and governance

SCORE 3.5

MangoApps provides an administration centre where all available administrative features are listed, organised into categories that expand to show further options. MangoApps allows admins to turn selected features on or off, so that a company can launch their intranet in phases to help support user adoption. This ensures that the most useful and desired features can be turned on first without overwhelming employees. Other admin pages are

presented as blocks of text – such as the site map. Overall we think the admin screens look a little daunting at first, although where roles have been defined individuals will only see relevant options, simplifying the experience.

Home pages are built using configurable widgets, allowing organisations to tailor the experience as appropriate. There is a good range of widgets to choose from that are configured through toggles and drop-down menus, which is a simple and effective approach.

At the core of all admin features is MangoApps' focus on strong user governance. Admins are able to define custom roles, such as governance admins, search admins, social experts, etc., tailored to their requirements. Please see the Highlights for more on this. There is also good support for content life cycle management. After a pre-defined period, the status of content becomes 'expired' unless it's re-verified by a content owner. The process is supported by a dedicated reviewer dashboard that allows for greater visibility into existing content, as well as to review and approve or disapprove it easily. Admins can customise the length of the default review period to best support their users' needs in content management.

For multilingual sites, MangoApps can use Google translate for on-the-fly translations of any page, including user posts. For more formally published content, it will handle variations of the same page that have been manually translated. The platform will serve up whichever language matches the user's profile preference. However, there are no specific tools for managing translation workflow.



#### 7. Analytics

SCORE 3+

MangoApps provides some analytics and recommendations to help track user engagement, as well as to help admins understand what kind of content is getting the best response. Out-of-the-box reports include active teams, users' activity, influencers / top users, page views, hashtag usage, search, and LMS reports. These reports give insights into various aspects of content usage, including things like an engagement meter, content analytics, and

per-post activity charts. The ROI and engagement dashboards work very well here – see the Highlights for more. User acknowledgement reports are also included here for mandatory reads, where it's possible to generate reminders to those who are yet to acknowledge.

However, the analytics do not support more advanced, holistic analytics, such as reports per channel. Getting an overall helicopter view, and identifying trends and patterns in user engagement, would be helpful. The performance of multiple posts across a communications campaign is also missing, although MangoApps says this is on the roadmap.

One way to help plug some of the gaps is to connect the analytics report data to PowerBI, further analysed there, and then the PowerBI widget can be directly added to MangoApps pages. This way it's easy to add customisable widgets directly onto pages to display key metrics in real-time, but it does decouple analytics from the other admin interfaces.

There is a dedicated admin dashboard for managing the search engine, which includes analytics. This shows top search terms, plus those with low quality results. This can be usefully applied to guide where extra tags would help.

#### 8. Digital workplace integrations

2.5+

MangoApps provides integration options to a range of applications including Google Workspace Apps, Box, SharePoint, OneDrive, Dropbox, ADP, Salesforce, Jira and Zendesk. However, the level of integration varies across these applications and are mostly read only.

Many integrations display information, such as from ADP that displays workload and shift management details within a widget. MangoApps can display notifications too, such as from Jira and Zendesk, which is useful but are shown in a widget rather than integrated with MangoApps own notifications system. Integrations are generally read-only, although some systems can be displayed as an iframe to embed a display, such as from Slack, which can be interacted with.

Most of the file integrations (such as Box, Google Docs and Dropbox) are links to the referenced documents from the MangoApps library. This means MangoApps can function as an aggregated collection of documents from multiple sources. Publishers are able to select from these integrated libraries to attach documents too, which is helpful. However, the integrated document libraries then act as links to the external sources rather than appearing to the user as if they are part of the MangoApps platform, so the results are not as well served as those in SharePoint (see Scenario 9).



## 9. Microsoft 365 integration

SCORE 2.5

MangoApps' integration with Microsoft 365 applications is somewhat limited compared to other platforms we've reviewed in this report.

Files can be synchronised from SharePoint and OneDrive to MangoApps, and displayed in the files library, as well as in files widgets. Federated Search works with SharePoint files. However, this connection to SharePoint libraries is not security trimmed; this is MangoApps' way for companies to disassociate

permissions from SharePoint and apply MangoApps sharing permissions instead. While in some cases it might be beneficial that MangoApps users don't need Office 365 licenses and they don't need to log in to Office 365 to view these files stored in SharePoint libraries, in other cases, it might raise security and information compliance considerations.

There is a MS Teams widget to display a list of Teams a user belongs to, but the integration is one-way; MangoApps cannot send updates or messages to Teams channels. Given how prevalent MS Teams is, we hope to see further options developed in future.

We were not shown any integrations with Viva or Yammer. There are some light integrations to show content from Delve and Power BI that are read-only. Outlook and Stream content can be displayed in widgets.

#### 10. Wildcard

score 4

The Learning Hub provides a simple but effective e-learning platform with various options that will meet the needs of many organisations, especially those that are introducing a learning management system for the first time. Users can browse the Course Catalogue, access their in-progress courses as well as courses they're assigned to. Managers can review their teams' learning progress as well, which is unusual among similar tools offered by other vendors.

Courses step people through 'chapters' of content, such as watching a video or reading an embedded document. By participating in a course users receive gamification points, which is designed to boost user engagement, as does the certificate that is awarded when someone completes a course. It is possible to store various certificate templates, which an admin can associate with each course as appropriate. Certificates can also be branded and appear on each person's profile.

The Learning Hub admin UI is clean and straightforward. Course administrators can use this to create or import courses (from a SCORM, AICC, xAPI, or cmi5 package), manage certificates, and manage course categories. Admins can create rules (by office location, department, date of joining, etc.) to personalise course assignments and recommendations. For example, onboarding courses might be mandatory after joining the company, or specific courses might be recommended for financial consultants, etc. Admins are able to generate various reports (learners' activity, learners' completion, assignment expiry, etc.) so see overall activity. These reports are available in .xlsx format for further processing as needed.

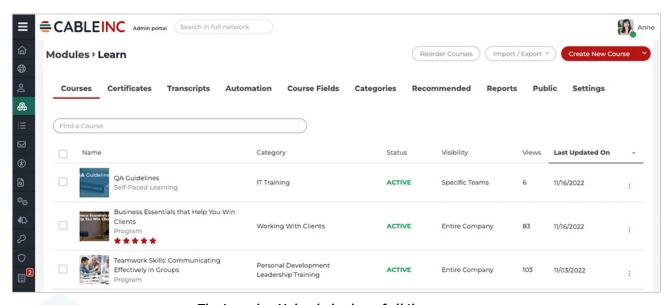
Overall, we felt that the capabilities were well rounded. Notably the features, such as certification, work well with other elements of the intranet, so it doesn't feel like a standalone module. Please see the Highlights for further details on the Learning Hub.

## **PRODUCT HIGHLIGHTS**

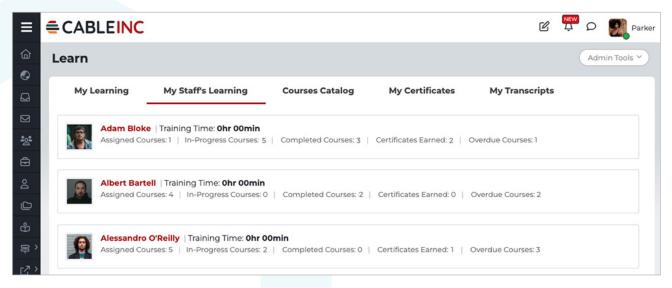
#### **Learning Hub**

The Learning Hub is a comprehensive platform that will meet the training needs of many SMEs. From distributing training material to tracking trainee progress, it can be configured to suit multiple scenarios.

The Training Hub enables admins to create personalised learning experiences for employees by leveraging templates and highly configurable capabilities. With the ability to upload documents, videos, and images, it's quick and easy to create training materials. The Course Catalogue allows admins to manage the syllabus, and it is possible to auto-enrol employees in training classes based on their profile, for example. With the Admin Dashboard, admins can also manage employee evaluations and certifications, and generate detailed reports on training performance.



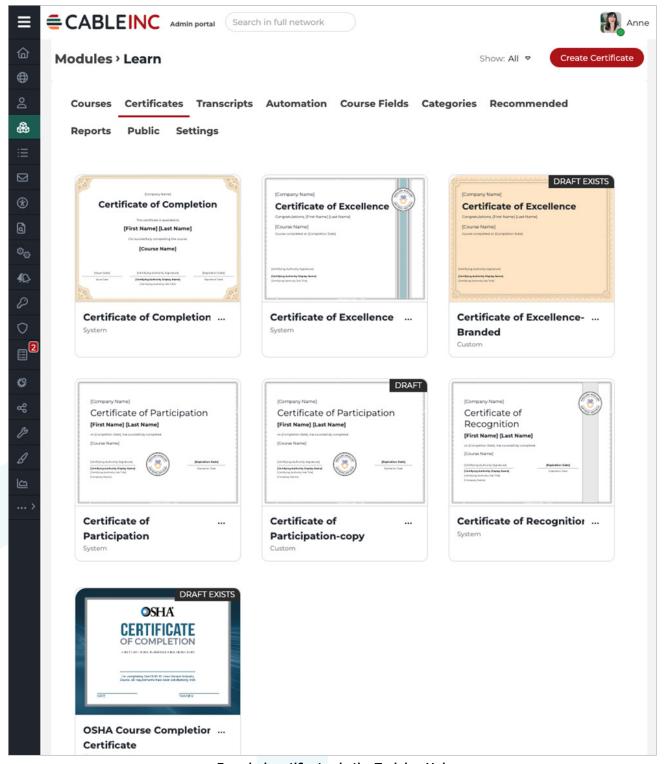
The Learning Hub admin view of all the courses.



Learning Hub admin view of employees and their progress.



Courses step people through 'chapters' of content, such as watching a video or reading an embedded document. By participating in a course users receive gamification points, which is designed to boost user engagement, as does the certificate that is awarded when someone completes a course. We particularly liked that not only the courses, but also the course certificates can be branded. These certificates then show on each employee's profile and can be searched for in the directory. This is helpful, as the certificates could be used as a way to fill shift gaps by searching for people who have undergone the required training for each role.

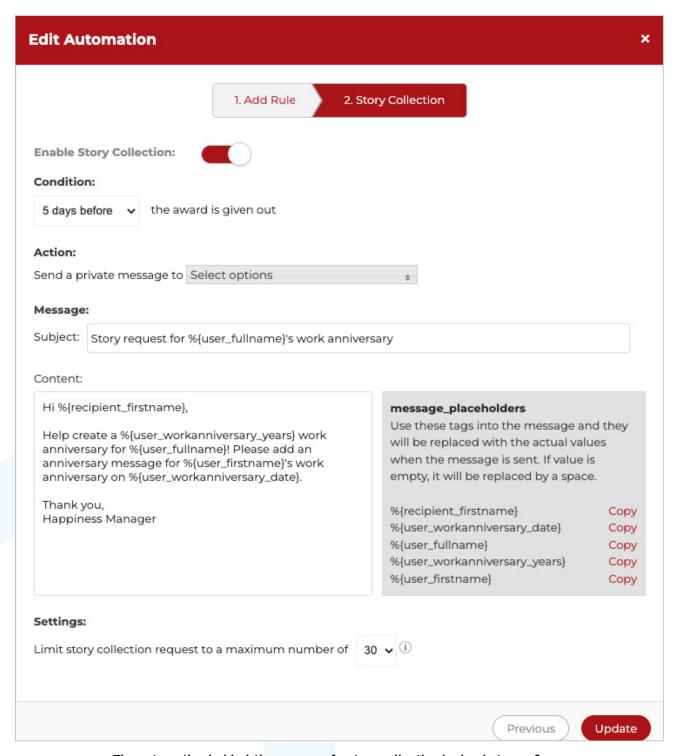


Branded certificates in the Training Hub.



#### 'Story collections'

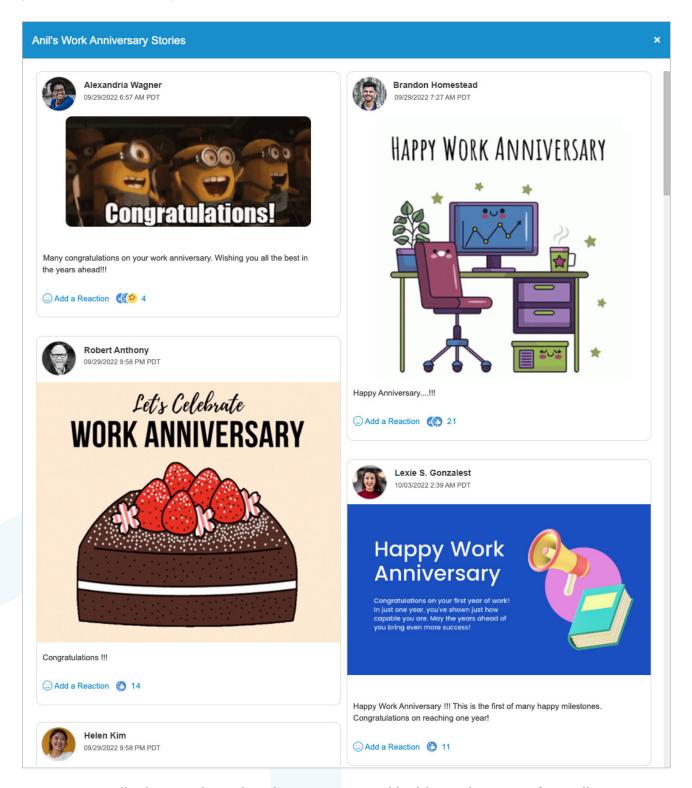
One feature that struck us as a great idea for engaging employees was common celebrations, like birthdays or work anniversaries. MangoApps has the usual ability to embellish posts with images and emojis, which can be used to create nice posts in someone's feed. However, the 'story collections' ability digitally replicates the office scenario of 'everybody sign a card for Jemima'. The story collection feature will contact all contributors privately, and then collate messages into a single display.



The automation behind-the-scenes of a story collection is simple to configure.



Colleagues can share stories, memories, wishes, etc. as part of the workflow and on the anniversary day, the collection will be shared with the rewarded user. The whole process can be automated for a category such as a work anniversary to make it easy to maintain. The final 'congratulations' messages are much more personal and memorable, adding a real element of personalisation to the process.



A personalised, composite work anniversary message with wishes and messages from colleagues.

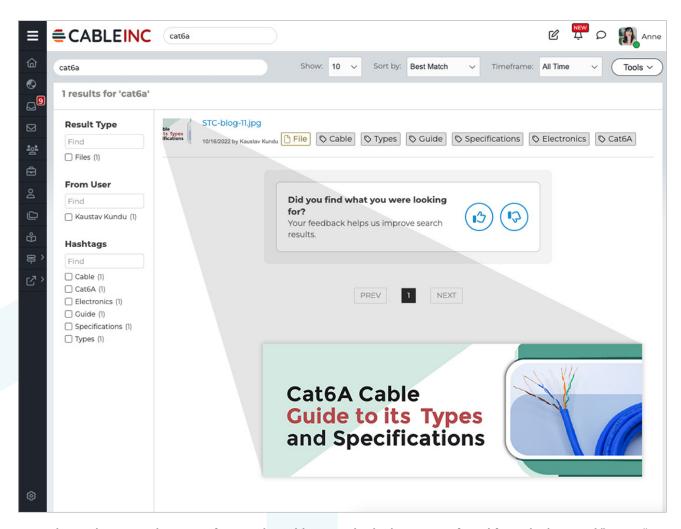


#### **Auto-tagging**

There is a helpful auto-tagging capability, which MangoApps says is powered by state-of-the-art AI algorithms. If implemented well, auto-tagging can improve findability and content usability; it also eases the load on the Communications team as well as on content editors because they don't have to spend their time tagging content. Helpfully, all tags can be curated manually to ensure consistent and human-controlled quality.

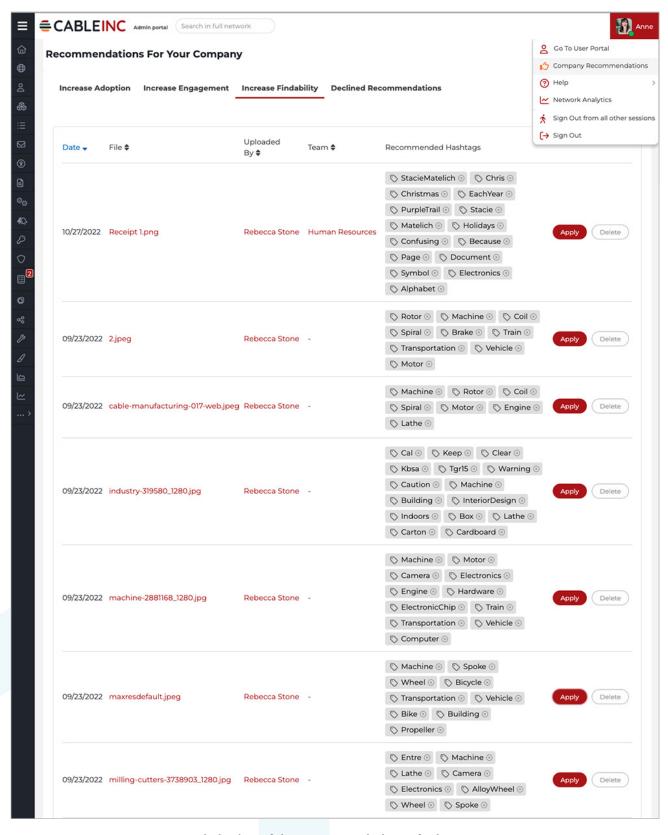
What's particularly impressive about this feature is that tagging can be automatically applied to images as well as other files. The AI engine can auto-detect labels, objects and activities in the image and automatically generate tags that have the highest score to the image (up to a max of 15 tags). The tags can be automatically assigned, or just recommended for further curation, depending on the tagging settings. We were particularly impressed by a demonstration search that matched the search term to the signage of a building within an image file.

If auto-tagging is turned on, image analysis will be triggered when a new image, or a new version of an existing image, is uploaded. What's even more remarkable here is that personal information can be identified (via PII detection) as part of this process, allowing configured policy rules to be applied.



An image is returned as part of a search. In this example the image was found from the keyword "CAT6a".



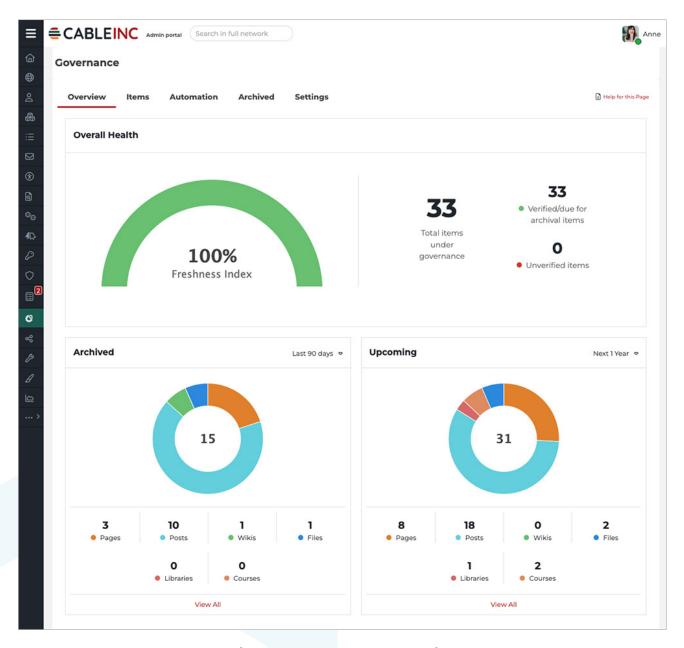


Admin view of the recommended tags for images.



#### Governance

Governance is a strong feature in MangoApps. The Governance dashboard provides an overview of overall health of all items, including a freshness index, total number of items under governance, as well as verified / unverified items. The governance admin menu provides an overview of every active item, as well as archived items. From here the governance admin can view and manage items under governance, and configure automation rules as well.

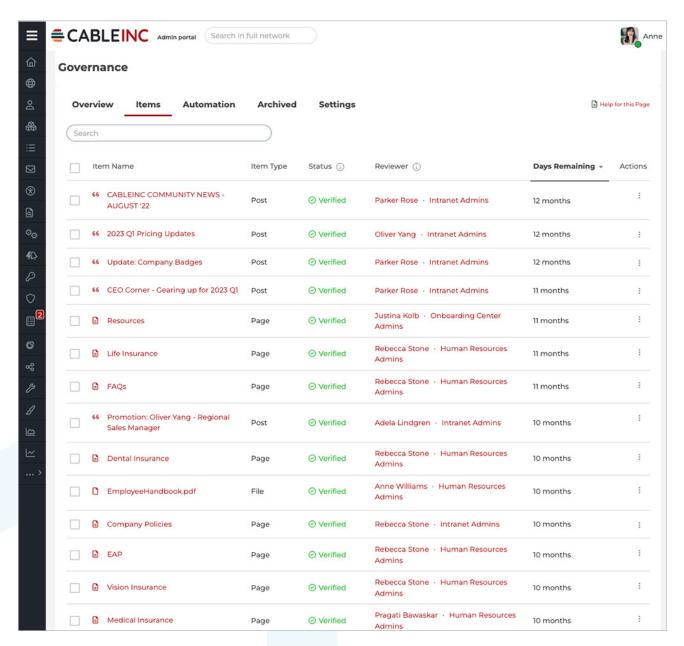


The MangoApps governance overview.



The platform's auto-governance option makes it possible to automatically manage, review and archive outdated content as part of a workflow. A default governance policy can be created that will be applied to all items. Helpfully, content creators and administrators are able to change the auto-governance policy on each individual content item where desired.

The auto-governance rule defines a time period, after which the item needs to be reviewed or it will be automatically archived. If an item is set to be reviewed, but the responsible person (reviewer) is not performing any review, then the content will be archived after another one month (this can be changed in the auto-governance rule). Archived content can also be automatically deleted after a pre-defined period of time, should organisations choose to.

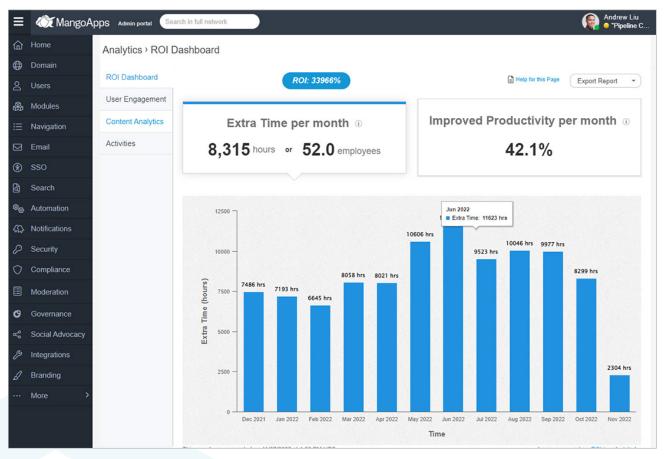


Documents under auto-governance in MangoApps, giving a view of verified and expired documents.



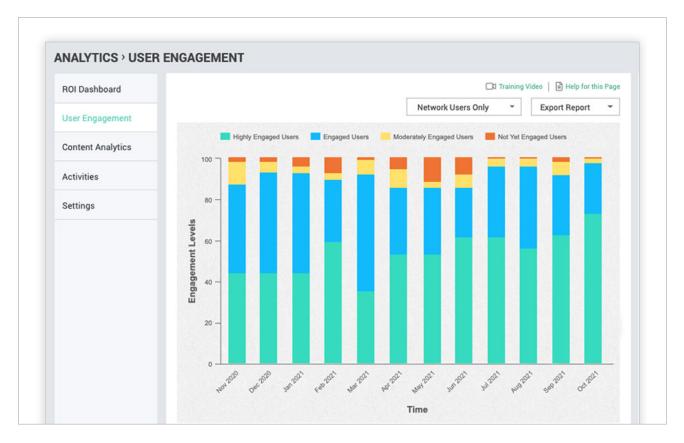
#### **ROI** Dashboard

MangoApps has a broad set of analytics, but one aspect that stood out to us was the ROI dashboard. The ROI of the platform is automatically calculated based on the activity of users on the intranet. MangoApps says that the system looks at fifteen signals for how well the platform is used then applies models from IDC, McKinsey, and more for their ROI calculation. Administrators can see the total time freed up every month for other tasks by using MangoApps, as well as the gain in employee productivity in every month. More information about how the ROI is calculated can be found on the bottom of the ROI Dashboard. Although this isn't a universally accepted argument for intranet ROI, we nevertheless feel it gives a repeatable, quantified baseline for internal discussions about intranet performance.



MangoApps ROI dashboard with productivity overview.

The Dashboard provides insights into user engagement, with data on important metrics such as the proportion of users at each level of engagement per month. The list of users for each level can be downloaded in Excel format for further processing. On the bottom of the dashboard suggestions can be found to increase user engagement, including things like use of gamification (levels and badges), events, promoting content across different channels, sending out announcements for the latest news and information, etc.



MangoApps ROI dashboard with user engagement overview.



# THINGS TO BEAR IN MIND

MangoApps comes with a broad set of modules, which are simple at times but also effective. It works well for companies that need a range of features for which they don't have dedicated systems. One example is the Learning Hub, which provides good features that SMEs may currently lack. The price point may be appealing to smaller businesses. Some larger organisations may feel that MangoApps duplicates capabilities that they have already procured from elsewhere, or that the functionality is too simple for a higher price, but others may find it an opportunity to simplify their technology stack.

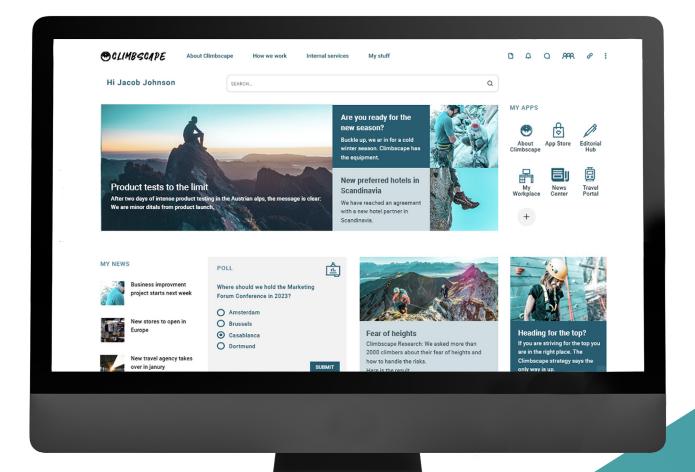
There are some integration options as an alternative to using in-built features, but these tend to be read-only or via iframes. This is a simpler approach to integrations than other products we've seen, so might not be expansive enough for enterprise organisations. Similarly, companies who have already invested in Microsoft 365 will need to consider how well aligned a MangoApps intranet would be. Partly because there would be considerable functional overlap, and partly because MangoApps' integration with Microsoft 365 is somewhat limited.

## Why choose this product

MangoApps is a cost friendly, rich, and customisable communication platform and learning management system that can be customised to meet users' needs. It is ideal for mid-size and potentially larger organisations that plan to roll out the new intranet in phases, or those that need broader business services that aren't met by other technology. It also works well across different device types, making it one to consider for frontline workers.

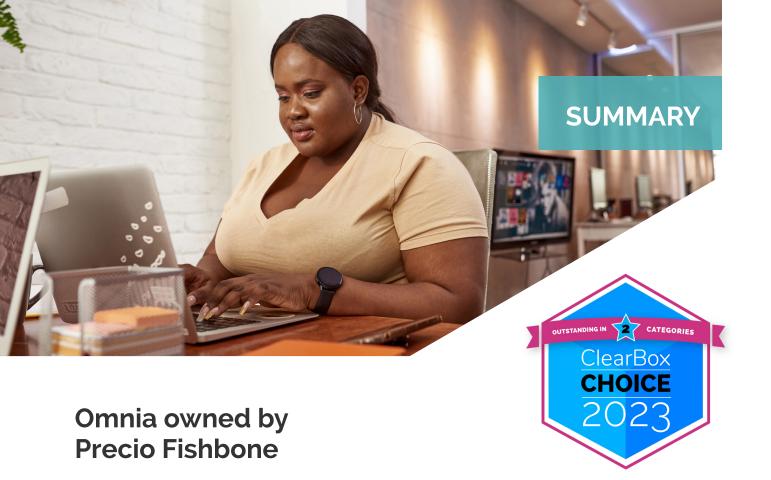


# omnåa



## Our view in one tweet

@OmniaIntranet is a highly flexible product that delivers an attractive and fully featured intranet with a great user experience.



Omnia, owned by Precio Fishbone (headquartered in Stockholm, Sweden, but with global partners) is a highly flexible and feature-rich platform from a company with a wealth of experience in the market. SharePoint is required for master data and content storage, but the product has its own enhanced user interface in many areas. It also includes a mobile solution for frontline workers that do not have a Microsoft 365 licence.

The experience for end users, authors and editors is excellent. The site looks attractive and navigation is handled in innovative ways. The presentation of complex reference material and news articles is strong, with a good search experience to help people find content. Admins have a great deal of control over the whole site, making Omnia one of the most flexible products that still conforms to Microsoft standards. This flexibility also applies to the mobile experience, which can be fully configured to the needs of the user.

Integrations with M365 applications

work well, especially with Microsoft Teams and Yammer. Out-of-the-box integrations with other business tools are limited though, and the ones that are available show read-only information. This can be addressed by using Omnia's extension framework or by leveraging Power Platform connectors, but this will take some time and resources to set up. Analytics dashboards are available but are not as advanced as in other products in this report.

While it is possible for smaller companies to set up a basic intranet quickly, Omnia will mainly appeal to large organisations with complex needs. A dedicated administrator or team will be useful to fully understand and manage all the features and flexibility. With some investment in time and effort, Omnia can be turned into a powerful hub in an organisation's digital workplace. Its price point is also very appealing to businesses of all sizes, so we would expect Omnia to appear on many buyers' shortlist.

# Summary table of scenario scores

# NO. SCENARIO/SCORE 1 User experience and visual appeal Mobile and frontline support 2 Internal communication 3 Community and engagement 4 Information finding and knowledge management 6 Admin experience and governance Analytics 7 Digital workplace integrations 8 Microsoft 365 integration 10 Wildcard

#### **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$\$\$\$
20,000 users	\$ \$ \$ \$

#### PRICING MODEL

Subscription – price band based on number of users, one-off payment and ongoing maintenance fee.

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, frontline users.

Price includes: Project workshops, training for admins, training for end users, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, hosting, access to a community & webinars, consulting services.

# **Key benefits**

- Omnia's user experience is excellent and can be flexibly adapted to all device types.
- Innovative navigation and a strong search experience make it easy for users to find information.
- Integrations with Microsoft 365 applications are strong, especially with MS Teams and Yammer.
- Performance on Omnia is strong; the user interface is very fast and pages load quickly.
- Pricing is attractive for businesses of all sizes.

# Improvements and considerations

- Omnia's flexibility means that it can be complex for admins to manage, and the admin experience isn't as good as the one for end users.
- · Analytics dashboards are available but are not as advanced as in other products in this report.
- Omnia can be extended through APIs and connectors, but there are limited business integrations available out-of-the-box.



# **Product type**



# **Branding opportunities**

All branding, complex options

# Target businesses



**SMALL** less than 1,000 people



MEDIUM 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems



Fully standalone



Requires SharePoint



Optionally works with SharePoint



Other

# **Sectors**



Business, consulting and management



Engineering and manufacturing



Property and construction



Public services, government and administration



Retail

You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



# Company

Precio Fishbone



#### Company founded

2001



#### **Company locations**

Stockholm, Sweden (HQ), UK, Germany, Canada, Vietnam, Denmark, Norway, and Sweden



#### ISO 27001 certified

Yes



#### Typical client size

2,000-5,000 employees



# Largest deployment so far

Largest deployment is 180,000 users and 34 countries.



#### Partner locations

Australia, Austria, Belgium, Canada, Denmark, England, Finland, Germany, Netherlands, Norway, Poland, Spain, Sweden, Switzerland and USA.



#### Customers

Clients include: Electrolux, Regeneron, ICA, Finastra, Signify, City of Malmö, Oatly, Haldex, Koenigsegg, and Harris Computers.

#### Product and technical details

Name of product	Omnia
Product launched	2015
Current version	7
Accessibility	WCAG 2.2 compliant



#### Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services

Vendorhosted Microsoft 365 tenant

Other

#### Data residency

Client's data always resides in the same Azure region as the customer's Microsoft 365 tenant.

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active
Directory

**ADFS** 

Open ID

Oauth

G Suite

Other\*

#### Search technology

Apache Lucene/ Solr Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

#### Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

#### SharePoint/0365 versions supported (if applicable)

SP Server 2016
----------------

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

#### Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other



<sup>\*</sup> Kaizala, Facebook account, Google account

#### Reverse-out options

All master data (and content) is stored in the customer's Microsoft 365 tenant. Any data stored in Omnia will be provided to the customer on request (and deleted when the Omnia environment is taken down).

#### Languages supported

English, Spanish, French, German, Dutch, Flemish, Swedish, Danish, Norwegian, Finnish, and Vietnamese.

#### Machine translation

Yes - via the product

#### Right to left script

Yes

# Set-up and support

#### Set-up process for new clients

Omnia can be implemented using a recommended project model and the built-in Quick Setup Wizard, allowing for a solution delivery with all essential features and settings in a few weeks. The product also contains additional modules (included in the license fee) that allow the customer to extend the solution over time, for instance enhanced document management, knowledge sharing, project management, sign-off requests, or an extranet.

#### Product updates

2-3 major releases per year (including new and updated features) and 2-3 releases focusing on performance and platform improvements.

#### Product update process

Rollout of new releases are included in the license fee and customers can choose between being in the first, second or last release cycle. Customers can also request to have a customised release cycle with the possibility to schedule releases.

#### Technical support

Product and hosting support can be delivered to customers and partners from Vietnam, Sweden, and Canada covering all time zones.

#### User community

The Omnia User Group is a part of a customer success programme that has over 800 members. Members are regularly invited to knowledge sharing activities such as online training, product information webinars, customer stories, online community for knowledge sharing, and two annual conferences (Omnia Online Conference via Teams and Omnia User Group Conference).



#### In their own words

Precio Fishbone says: "Our customers choose Omnia for powerful publishing and governance tools, seamless integration with Microsoft 365, and delivering outstanding 'look and feel'. The product is easy to implement, deliver best in class performance and comes with an ambitious customer success program."

# Their view of the marketplace

Precio Fishbone says: "In 2023, we see a rising number of organizations that allocate resources for improving the employee experience. The top priority is to establish solutions that can engage all employees, including frontline teams, in disparate working roles and situations. To deliver on this, digital workplace leaders are requesting dynamic navigation solutions, customized search experience, and seamless integration with Microsoft 365 and business applications for these initiatives. Our forecast is that the interest in these areas will continue to grow over the upcoming years."

### Voice of the customer

Omnia's "wealth of integrations" with various Microsoft 365 products is quoted most often by customers as a key area of strength. According to one customer "the combination with M365 simplifies different functionalities, like having the intranet in Teams for example". Another point that several customers mentioned was the speed of the interface. "Page load speed is very good" said one customer, while a second one praised overall performance: "Great performance. It's fast to open pages and instant when publishing."

When it comes to product improvements, a few customers mentioned the admin functionality. "Administration templates" need to be better according to some, while another customer asked that "some things in the admin interface should be available to editors as well". One customer found the product "a bit fragmented" and "managing governance, permissions and languages in several places is far from ideal".

The experience of working together with Precio Fishbone is largely positive. "Really good! They think along and take suggestions into consideration" and "in the implementation phase we had very productive weekly stand ups" are some of the positive comments we received. A few customers expressed some reservation about the work carried out during the implementation phase. One customer commented "I see room for improvements in project management and methodology when working with customers' HR & Communications with its specific demands". Another customer faced "some challenges in understanding our work and our needs during the implementation phase" but added that "through communication we solved most parts".





SEARCH...



Are you ready for the new season?

Buckle up, we ar in for a cold winter season. Climbscape has

New preferred hotels in Scandinavia

We have reached an agreement with a new hotel partner in Scandinavia.



MY APPS

Q



















Business improvment project starts next week



New stores to open in



New travel agency takes over in janury



New travel policy approved from November 1st



New terms in corporate insurance policy



Counting down to release of spring 2023



StarForce Tour Alpride Firmware Update







2000 climbers about their fear of heights and how to handle the risks. Here is the result.





# LUNCH MENU Gothenburg 5-7 December

Meat loaf with creame sauce, lingonberry, pickled cucumber and mash. Included: Bread, butter and Dead ringer for love.

Tuesday	
Wednesda	



Thursday Friday

#### LATEST EVENTS DOCUMENTS DISCUSSIONS



Steve Nixon Art Director



Alicia Jones General Manager

Join a communiy today



James Harrington Product Developer



Sales Manager

#### VIDEO





Jeremy and Alexis explains the Q3 numbers



How we will launch products in the new year









(V)=)

#### Climbscape in the airwaves

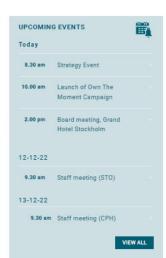


\$ 28,2M

Climbscape's harness makes us wanna swing that rope AlpinPunx . 4 hours ago



Extremsportmärket Climbscape med huvudkontor i Stockholm öppnar... DN.SE. 4 hours ago









# **REVIEW**

# 1. User experience and visual appeal



score 4.5

Omnia's user interface is clean, contemporary, and highly flexible to meet the needs of all sizes of organisations with different levels of complexity. For small companies, a simple setup wizard will install a basic intranet with sensible defaults. In more complex organisations, admins can build page layouts from configurable content blocks and widgets. Widgets can roll up news articles and practical content, such as recently used apps, and present the information to

users in intuitive ways. New users are presented with a (dismissible) welcome tutorial pop-up that admins configure with imagery and pagination. As already noted, the user interface is noticeably faster than in many other products in this report.

The scope of how users can navigate the site is impressive. Admins can choose between simple links or opt for a dynamic and visual mega menu, the content of which can be audience targeted. There are different styles of mega menu too, including a rich card-based content rollup and a multi-level mega menu that's reminiscent of a directory; see the Highlights section for details and screenshots. At a page level, Omnia comes with configurable sub-section navigation and a breadcrumb trail.

Notifications are presented to users via an alert bell in the top menu bar. Notifications are presented in an intuitive panel layout where they are split by origin and type, such as outstanding tasks, and new ones are highlighted. Notifications can be used for news articles (see Scenario 3) and those from integrated systems (see Scenario 8) are also found here.

Branding is flexible and goes well beyond what standard SharePoint has to offer. Admins have control over a wide range of visual elements and can create an overall design that looks very different from a traditional intranet, for instance with a limited, app-based navigation and highly visual pages. Complex branding and sub-branding needs are handled by settings associated with 'business profiles' in Omnia. 'Business profiles' make it possible to define different logos, branding themes, language, and mega-menu content for different areas within a complex intranet setup. This means that different user groups can feel like they have their own dedicated tool, if desired.



# 2. Mobile and frontline support

3.5+

Omnia serves the needs of mobile users through a responsive site and a native app called Omnia Feed, available for iOS and Android. The product supports Azure AD and many other authentication providers, and also includes its own user management capability through a centrally held database. Frontline workers without a Microsoft licence can also use the app; the product includes features to encourage adoption, for instance through QR codes to download

the app from the public stores. There is also a white label option and support for MDM, but no self-registration option; we think this would be a nice addition to an already versatile offering.

The Omnia Feed app can present the whole intranet experience via an 'intranet' button in the bottom navigation, or users can be presented with different experiences based on business profiles. We were shown a business profile for frontline workers, where the most relevant functions of the intranet, such as people finding and searching a product catalogue, were included in the bottom navigation. Presentation of content is intuitive and purposefully designed, with quick links in the form of large and easy-to-click buttons.

The app includes a few features and tools that are directly targeted at frontline workers. A news feed and push notifications for targeted news stories are supported, and they include an option to request sign-off, for instance for a new safety procedure. A simple tool for leave requests is integrated as a Power App, and more such tools can easily be added. There is also an area for social posts to support group discussions among frontline workers. A real-time chat feature is not part of Omnia Feed, but overall the app does a good job at making intranet functionality work effectively on smaller screens.

Administration, such as setting up the business profiles and laying out the pages within the app, is well integrated into the central Omnia Admin area. Administrators can set breakpoints for page content blocks and choose whether to hide elements, such as the navigation breadcrumb. We like the flexibility to set up specific designs for different business profiles and fine-tune them for use on smartphone or tablet.

#### 3. Internal communication

score 4

Reference and news pages are created in the same way in Omnia, based on page types managed by administrators. Predefined templates can be strictly enforced if required, but a 'design mode' on a page allows publishers to configure some or all content blocks. The 'write mode' is where the content of the page is added into the template; a configurable rich text editor is available for this purpose. There is also an excellent 'Media Picker' to bring pages to life

with visuals or video; please see the Highlights section for details.

Targeting of news and other content within Omnia is handled in a flexible way through appropriate metadata. It's possible to target specific departments, locations, or any other type of audience based on user profile data. In addition, users can subscribe to news by indicating their preferences in their profile. Publishers have the option to assign their article to a publishing channel, which is another flexible mechanism to deliver news to the right audiences. Each channel has an owner who will receive a notification to approve. To manage the editorial process, Omnia includes a well-designed Editorial Centre with a calendar view of scheduled



articles. We like the concept of an editorial hub but would like to see some additional features, such as a visual Kanban board, to help internal communicators with their editorial planning.

Omnia handles critical communications through announcement banners, which are prominently positioned as a banner across the intranet. Admins can choose to colour code the alerts, and the optional commenting feature is useful in certain scenarios. Another approach to critical communications is by creating a dedicated news roll-up to position an article prominently.

Content on Omnia can extend into digital signage. The product includes a generic solution that allows an admin to set up a publishing channel for one or more screens, and then publish news articles into this channel. Omnia also includes a basic newsletter builder, and news widgets are easy to add into MS Teams.

Overall, news creation is an area of strength for Omnia, and publishers and editors will appreciate the overviews in the Editorial Centre. The approach deviates from standard modern SharePoint, which means that people used to working with SharePoint will need some time to acclimatise. Omnia also includes a simple setup for a basic publishing experience, so smaller organisations should not be worried about the many options to consider.

#### 4. Community and engagement

score 4

Omnia has inbuilt spaces for team collaboration, communities of practice and communities for social activities. All these are either open or access restricted, and each is built from a configurable template, for example communities always include an activity feed by default. Latest activities are gathered in the user's notification panel, which makes it easy to stay on top of what's going on. More about communities is included in the Highlights section.

Commenting and social reactions on content are possible throughout the product, if enabled, for instance on pages and news articles. A variety of social reactions are supported, from simple liking to emoticons and an integration with Giphy. Content owners and community moderators can delete inappropriate comments; a deny list for banned words would be a useful additional feature. Users may also rate pages and articles, and highest rated pages are aggregated in a separate widget.

Two solutions are included to gather user feedback. Users can complete simple polls in a widget that then displays responses dynamically. For more in-depth surveys, Omnia includes a form builder tool that provides various configurable options for building full-featured surveys. The product also includes some gamification elements within the different types of communities. Points and badges can be earned for predefined activities, and there is a widget to show top contributors within a given community. There is currently no product-wide system of badges or a global leaderboard within the product; Precio Fishbone says that this is on the roadmap.

Omnia takes a thoughtful approach to the employee life cycle and includes features to support employees at various stages. There is a well-designed template for an onboarding (and pre-boarding) portal. Onboarding is further supported through micro-courses within Omnia's 'Learning Centre', where newcomers are guided through simple, step-by-step learning activities that may include videos and a knowledge self-test at the end. The Learning Centre is a powerful module with features to create, publish and manage both instructor-led and online courses; details are in the Highlights section. It integrates well with MS Teams and Viva Learning; this is further discussed in Scenario 9.



# 5. Information finding and knowledge management



SCORE 1

Omnia makes good use of SharePoint and Microsoft search behind the scenes, and has built a custom front end search experience that is attractive and feature rich. When a user enters a search term they are presented with 'quick search' results in a pop-out panel. Spelling corrections are suggested if an error is suspected, and promoted results are displayed if applicable. Users can then move onto an 'advanced search', which expands the results

into a well-designed, faceted layout. Each facet has configurable refiners, such as news, with a helpful slider for older and newer content. Where a user is dissatisfied with the search results, they can send feedback with a snapshot of results they received.

Search management is particularly strong, as admins have control over the entire experience from within the Omnia administration centre. Here admins will configure all elements of the search experience, such as setting up refiners and promoted results. It's also where they will troubleshoot the feedback received from users.

The people search is intuitive and works well. Users can search by any profile field and will be presented with matching people cards. Results are then further refined using left-hand side filters such as skills or 'courses completed' from the Learning Centre (see Scenario 4). The people card layout is quite basic and stays close to what is available as standard in Microsoft 365, although there are some nice features to encourage employees to complete their profile. An organisation chart is also provided, which can be used to browse the organisational structure and learn about who works where and reports to whom.

Omnia provides several options for browsing content to find information. We particularly like the templates available for setting up a product catalogue. These cleverly combine search and navigation through a large volume of product descriptions and related information. There are also other means to turn information into navigable chunks, such as a simple accordion widget or a more sophisticated in-page navigation, see the Highlights section for examples. Omnia also includes a rich enterprise glossary, similar to Viva Topics, and a full-featured document management system that goes well beyond the standard SharePoint features and will be of interest to large organisations in regulated industries.

# 6. Admin experience and governance

SCORE

The Omnia platform is managed at different levels. While some settings and global page types apply across the Microsoft 365 tenant of the client, most elements are manged through 'business profiles' that contain branding, navigation, roles, and access rights. Each section of the intranet, or 'publishing app' in Omnia's terminology, has a business profile applied and associated content within it. Administrators can create global page templates for different

page types, such as a news page or policy page, and control the global navigation. All of this is handled via the Omnia administration area.

The content life cycle can be controlled through settings, such as entering a news article into a review workflow a year after publication. Associated admins or publishers receive a notification



when their content needs to be reviewed. The Editorial Centre, discussed in Scenario 3, has a few handy overview reports for 'reviews overdue', 'upcoming reviews' and 'modified long ago'. Controlled documents, managed in the document management system (see Scenario 5) can have their own life cycle and workflows applied to ensure they stay up to date.

Omnia handles translation well via a user role called 'Variation author'. Variation authors receive a notification when a page needs translating, where they see the original and their translation side-by-side as they work. Alternatively, Omnia will auto-translate content and display a flag to end-users saying that it was auto-generated. Admins must create alternative language versions of infrastructure content, such as breadcrumbs.

Overall, Omnia is a very flexible product, and as a result, the back end is complex, with a lot of multi-level screens to manage the site. Different levels of administrators can be defined though, and they will only see the options they have permissions for, keeping much of the site's complexity hidden from those who don't need it.

# 7. Analytics

SCORE 3+

Omnia includes several dashboards and in-page analytics that are useful for administrators, communicators and individual content owners. Within the Omnia administration area, a set of dashboards are available that focus mainly on user adoption and engagement with the content. Admins can configure elements of the reports, such as how they would define an active reader or contributor, then apply a target they would like to reach and track

progress in an associated dashboard. There is a dashboard about the usage of communities, and also search analytics is integrated, with useful information about abandoned queries and queries with no results.

For communicators and content owners, the Editorial Centre (see Scenario 3) includes statistics about news articles and content pages, such as most visited, most liked, and most commented content. It is possible to drill down to follow up usage by department and location. Communication campaigns are supported by setting up a 'campaign site' and tracking the success of news articles and content published within that site. At an individual page level, a page owner has access to basic insights into page visits over time. There are also reports to help with life cycle management of content; see Scenario 6.

Mandatory reading is managed through a mechanism of sign-off requests. Sign-offs are only trackable by those making the request, although results can be exported to a CSV file. Controlled documents can have read-receipt tracking and news articles can be marked 'mandatory' to display in associated widgets.

While the configuration is flexible and accessing the dashboards easy, the range of data and presentation of results has room for improvement when compared to other products in this report. Dashboards are simple graphs of just a few numbers; drilling down shows basic lists of users or pages. Some filters can be applied, for instance to see data for a particular location, but flexibility is missing to adjust date ranges dynamically. Omnia does offer the option to configure additional reports, or export to Excel. Integration with third-party tools such as Google Analytics and Hotjar is also supported for those organisations that wish to go beyond Omnia's standard offering.



# 8. Digital workplace integrations

SCORE 25+

Omnia offers different approaches to integration. In some areas the product includes an out-of-the-box solution, while for other areas there is the possibility to extend the product. Omnia includes a documented extensibility framework called 'OmniaFx' that clients and partners can leverage to develop what they need.

Out of the box, Omnia offers integrations with media storage services such as Pexels, YouTube, and Mediaflow during content creation. Admins can choose to add RSS feeds into widgets and add targeted links to core tools from the menu. There is also a useful integration with Draftable, allowing authors of controlled documents to compare versions and manage edits in a user-friendly layout. Connectors are available to link with a range of business systems including ServiceNow, Jira, Workday, and Trello. These connectors will display content in a widget within Omnia, and are also integrated into the notification panel. Information is readonly though; there is no interaction with the data within Omnia. Clicking on an item that requires attention in the notifications panel will take the user out of Omnia into the source application.

Omnia comes with a provisioning template that makes it possible to set up social collaboration in Workplace by Meta, for those customers who prefer not to use Omnia's own community features. There are no integrations with document storage platforms outside of Microsoft, but customers can make use of Microsoft standard Power Platform connectors for services such as Box, Dropbox, and Google Drive. If these connectors are implemented, then it is possible to configure the search within Omnia to federate documents in these sources.

Overall, Omnia's out-of-the-box integrations are less advanced than in other products in this report. While there are extensive possibilities for admins and partners to create more in-depth approaches, we would like to see improvements to the standard offering. For instance, a nice improvement would be to allow users to interact with an integrated business application from within Omnia, rather than having to leave the product.

#### Microsoft 365 integration

SCORE 4.5

Omnia integrates with Microsoft 365 applications very well. Content pages and controlled documents are stored in SharePoint, while Omnia facilitates permissions, life cycle management, workflows, user feedback and more to keep them up to date. Users can create documents using company templates from Omnia's top menu, which can then be stored in SharePoint or OneDrive. This means the company PowerPoint template or standard

supplier paperwork is easy to find, complete, and save, which can often be hard for users to do smoothly.

Integration into MS Teams is an area of focus for Precio Fishbone. Omnia is easily made available as a Teams app or through Viva Connections in MS Teams. We like that the Omnia top-level menu is optionally displayed on the left, which makes good use of the MS Teams window and reflects the Microsoft approach to navigation. From Omnia people cards, users can begin chats or start calls with colleagues directly in MS Teams. There is also a project and portfolio management module that is fully integrated with MS Teams; this is the subject of Scenario 10.

Yammer integration is also strong. Conversations in Yammer can be presented within a widget, news can be posted directly into a community feed, or Yammer can be used instead of Omnia's own communities. Posts, reactions, and comments are synchronised between Omnia and Yammer, which we think is a powerful feature.

Integration with Viva Connections makes it possible to display the full Omnia intranet in MS Teams, or to display a chosen scope using the product's Teams App Generator. More could be done to create adaptive cards to enhance the dashboard experience within Viva Connections. Courses from Omnia's Learning Centre can be surfaced in Viva Learning.

Other Microsoft applications are well integrated too. Power Apps display nicely in a widget within Omnia, and some of the branding theme information is pushed into the embedded Power App, so it adapts to the look and feel of the rest of the intranet. Clients can create additional Power Apps or request help from Precio Fishbone. Worth mentioning are also the smooth integration with Stream (both classic and new Stream in SharePoint), integration with Planner in the notification panel, and a widget to display Outlook calendar information.

#### 10. Wildcard

score 4

As their wildcard, Precio Fishbone presented their structured approach to project and portfolio management, integrated into MS Teams. As a first step, an administrator will set up one or more project models. These consist of a visual representation in a diagram, combined with a description, document templates and standard tasks. Together these describe a formal process within an organisation, such as a product development process.

In a second stage, when starting an actual project, a project model is then selected and applied as part of the project setup. Omnia provides a provisioning template for this, where policies such as a naming convention can be enforced. The project is then set up within MS Teams, and the predefined channels and top-level tabs are automatically created.

Information about all ongoing and past projects is brought together in a well-designed 'Project Centre'. It allows all users within the organisation to get an overview of corporate projects and access a subset of information about the projects that their owner has made available for public use. The Project Centre is also integrated with Omnia's enterprise glossary; users can click on labels and are directed to an explanatory page about the subject.

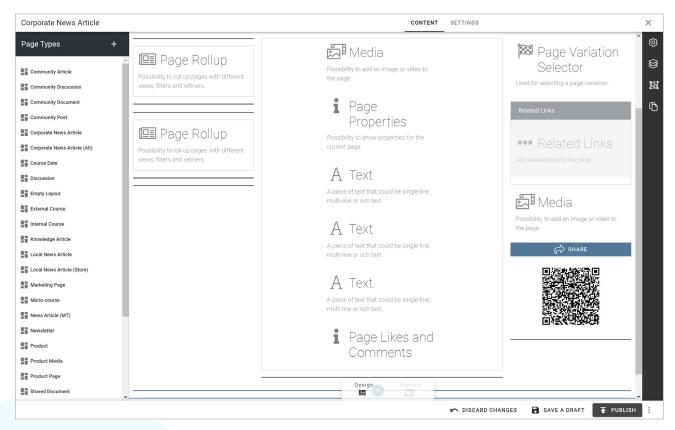
As in many other areas of Omnia, the breadth and depth of the available functionality is impressive. In a growing number of organisations, MS Teams is where the day-to-day management of projects is happening, and the integration that Omnia offers with MS Teams works particularly well. It brings a thoughtfully designed solution to issues of project portfolio management and governance that many organisations are facing. We believe that IT managers, and especially those responsible for managing a PMO (Project Management Office) within their organisation, will find the available functionality very relevant. Details and screenshots are in the Highlights section.



# **PRODUCT HIGHLIGHTS**

# Creating content pages

Static or reference content is built in the same way as news articles and landing pages, all through Omnia's page creation tools. As a first step, administrators set up different page types and create templates for them, using an intuitive interface where a variety of widgets can be placed into a multi-column layout.

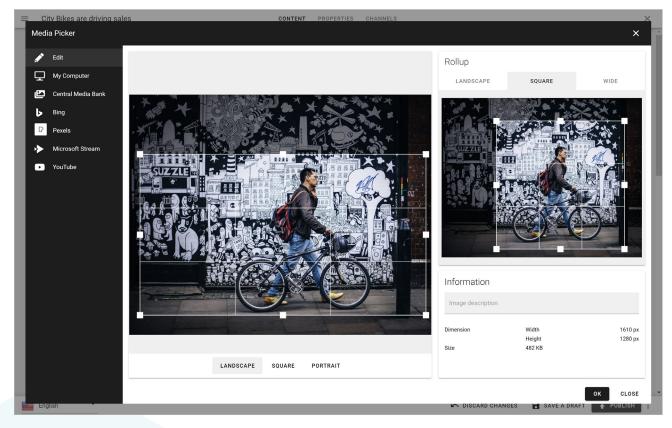


Designing a page layout for a corporate news article.



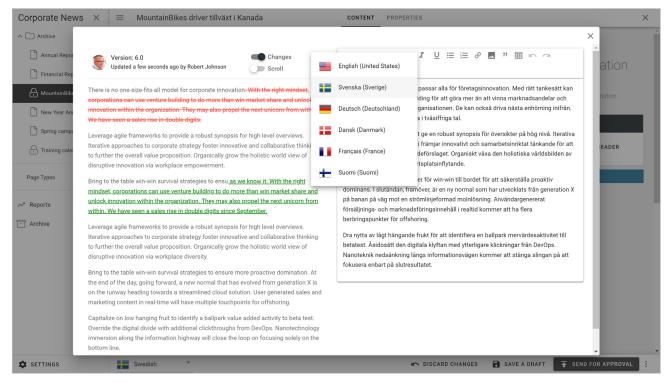
In a second step, publishers select an appropriate page type with a template applied, and start entering the content. Depending on permissions, content authors may be able to switch from 'write mode' into a 'design mode' allowing them to modify the template by adding different widgets or by changing the configuration of existing widgets. Pages may also be copied for use elsewhere if a design works particularly well.

We especially like the 'Media Picker' which helps content authors to bring pages to life with photography or video. Sources such as Bing and Pexels are available next to an organisation's internal database of approved photos. Publishers can easily make minor edits to selected images, such as applying filters and cropping out any unnecessary elements. Where the image would appear in a roll-up, publishers can adjust how it will look based on the standard sizing and ratio.



Media Picker is an intuitive tool to select photos or video from internal or external sources and make minor adjustments.

Omnia also includes helpful features to publish multilingual content. For each language in the system, a 'Variation author' will be assigned to handle translations. They will see the original text and the translation side-by-side as they work. If changes have been made to the original document, they will see what has changed through an intuitive change tracking mechanism, and can adapt the translation accordingly.

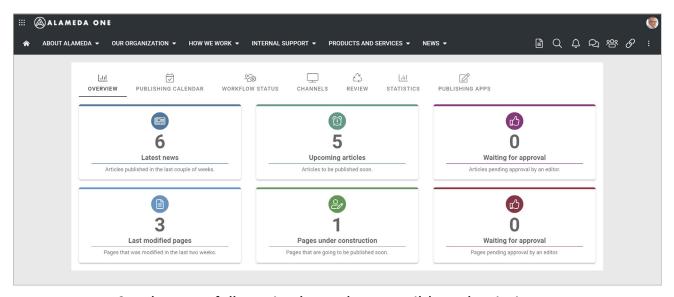


Translators see changes to the original document side-by-side with their translation.

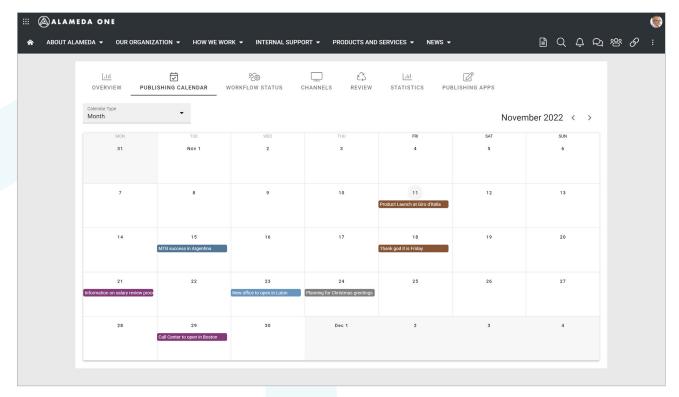


# **News publishing and Editorial Centre**

Omnia includes many features to facilitate the news publishing process. The Editorial Centre is where news authors and editors will go to manage their articles, using a number of well-designed reports and overview pages. There is an overview page where editors can see how many news articles are waiting to be published or pending approval. There is also a calendar view with all news articles that have been scheduled to go live on a later date. When publishers click on an article title in the calendar, they are taken to the article to edit it. Other useful information, such as an overview of content that is due to be reviewed, as well as basic statistics, are also found in the Editorial Centre.



Overview page of all recent and upcoming news articles and content pages.

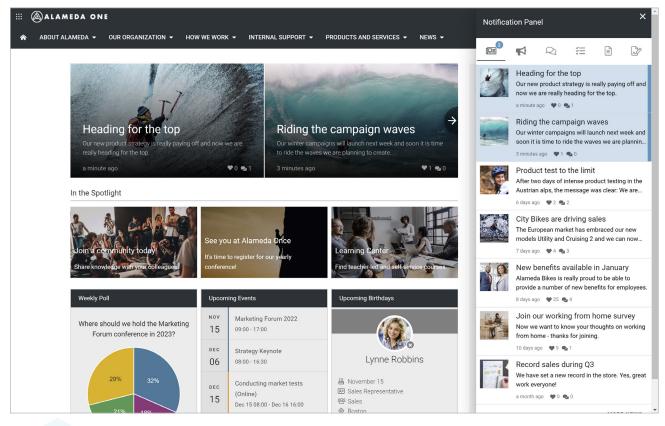


A calendar view with all news articles that are scheduled to be published in the future.



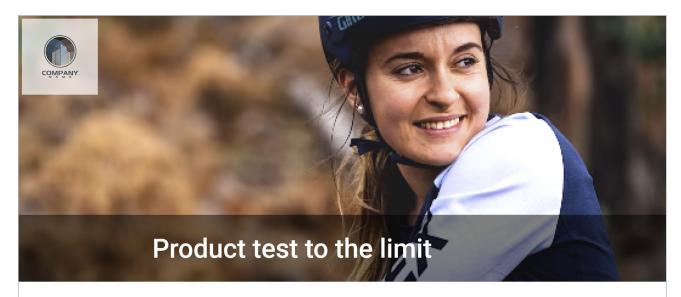
Content targeting is approached in two ways. The first is ideal for content that needs to be treated more securely or where it has a larger audience, and is handled through publishing channels. Publishers link a channel to their article, and it will be displayed in relevant news roll-ups, such as on the home page or in the notification panel.

The second method for content targeting is via metadata tags in the articles. The tags match with fields in the user profiles, such as location or department, and target content as appropriate. Additionally, users can choose to opt into additional tags, for instance to see news for another location than their own.



News articles are available in different places such as on the home page and in the notification panel.

Content on Omnia can extend beyond the intranet into the mobile app, into MS Teams or into a digital signage solution. Admins can choose to set up a channel dedicated to a group of screens or to one particular screen, giving publishers the option to publish directly to it. Alternatively, the screen could simply show a roll-up of selected existing news channels. News articles display using a slow scroll down the page, and a QR code is shown to guide passers-by to the full article on mobile.



After two days of intense product testing in the Austrian alps, the message was clear: We are minor details from product excellence

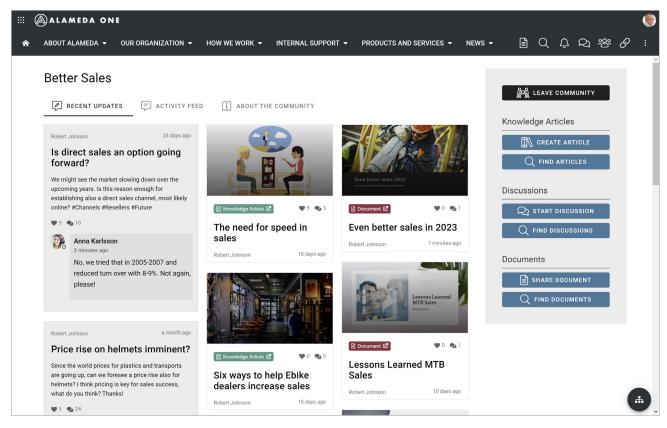
Here at Alameda, we test thousands of products every year in our workstations and on the roads and trails. We assess a wide range of criteria during our evaluations, covering safety, performance,



Digital signage screens display part of a news article, with a QR code to go to the full text on mobile.

# Knowledge Management through communities and learning

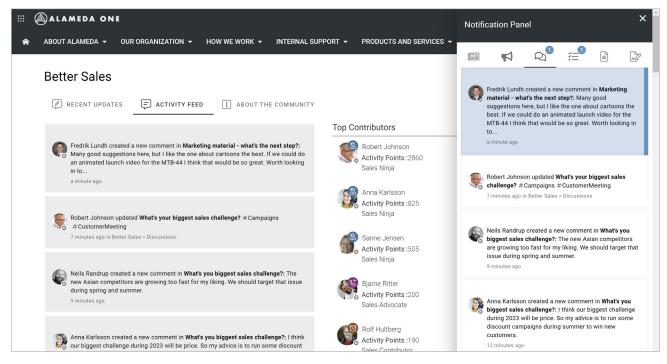
Knowledge management is handled well in communities within Omnia, where knowledge articles can be uploaded and discussions among users hosted through a discussion forum approach. Users are encouraged to choose from a list of interests in their profile, which will then recommend associated communities to them. Each is built from a configurable template that includes an activity feed displaying recent discussions and comments.



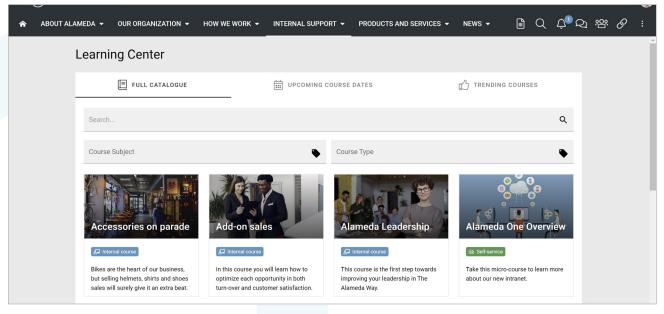
Communities are created from a configurable template, and make it easy to start discussions and add knowledge articles and documents.

Communities also include gamification elements. Points and badges can be earned by contributors, and the levels where these are awarded can be controlled by admins. Top contributors within the community are listed next to the activity feed. Communities also make good use of the notification panel. Users will be notified of latest activities across their communities, including badges that have been awarded to colleagues.

Knowledge and learning are areas of focus within Omnia, and its integrated Learning Centre provides some nice features to help businesses administer learning and training. Users start by browsing the full catalogue of available courses, filtering by subject or course type to find what they want to complete.



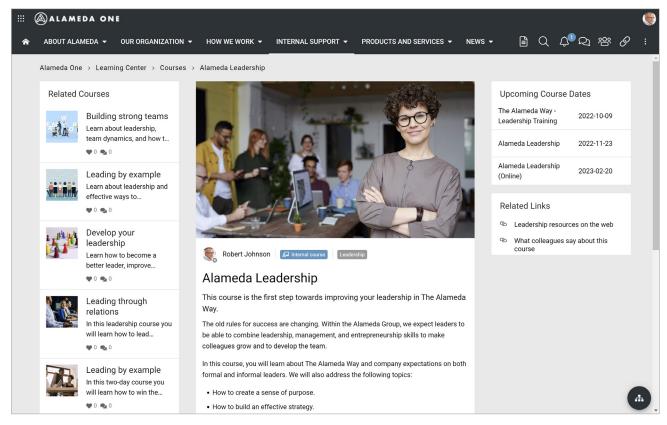
The notification panel groups all activities together across a user's communities.



The main page of the Learning Centre allows users to browse the full course catalogue or search for a specific subject of interest.



Users can view course descriptions, course dates and related courses. When signing up, the Learning Centre updates the number of available seats left (for classroom courses) and sends an email confirmation. The user's upcoming courses are shown within a calendar view within the Learning Centre but are also integrated into Outlook and MS Teams.

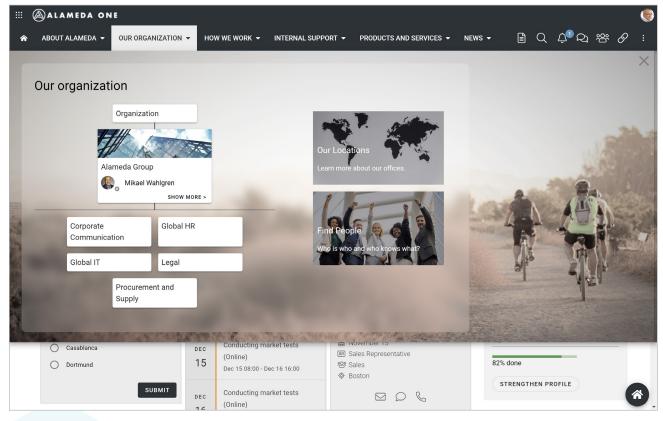


Users see a course description, available dates, and related courses.

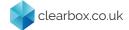


# Navigation and information finding

Omnia supports multiple features that help users to navigate the site and find the information they need. Mega menus are among the most flexible we've seen in any product in this report. Admins have full freedom to design the layout of the menus and include bold visuals and dynamic elements, including widgets that roll up content from within the site. One feature that we particularly like is a taxonomy-based navigation, for instance to navigate through the structure of the organisation. The navigable structure is displayed in the mega menu and will also appear as a left-hand side navigation on departmental landing pages.

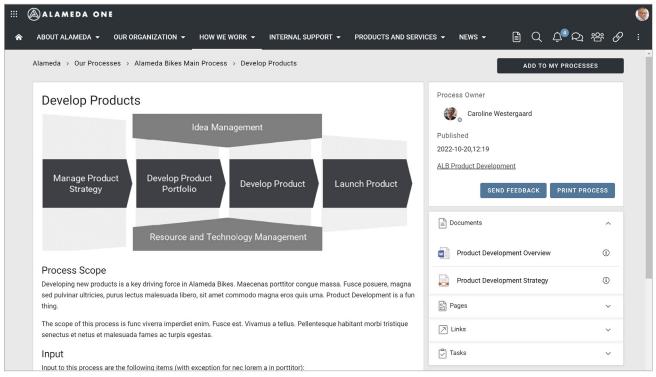


Admins have great flexibility to design visually bold mega menus, including a navigable organisation structure.

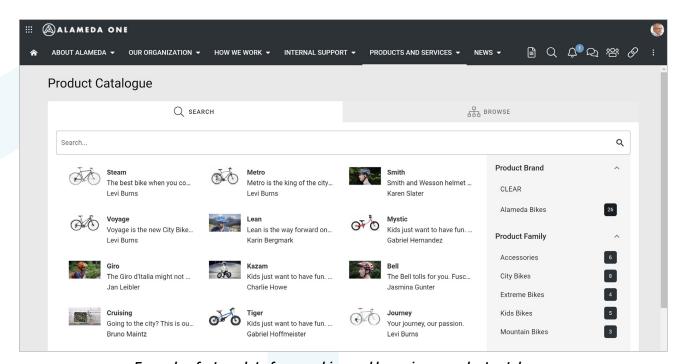


Another navigation component is used to browse through a graphical representation of certain types of content, such as a business process. As shown in the screenshot below, a clickable process diagram allows users to explore its different stages and milestones.

Omnia also includes templates to find information easily in large volumes of content, such as a product catalogue. A well-designed combination of searching and browsing makes it easy for users to find exactly the product they are looking for, for instance by using the refiners.



Users can explore the different phases of a project by clicking on the blocks in the process diagram at the top of the page.

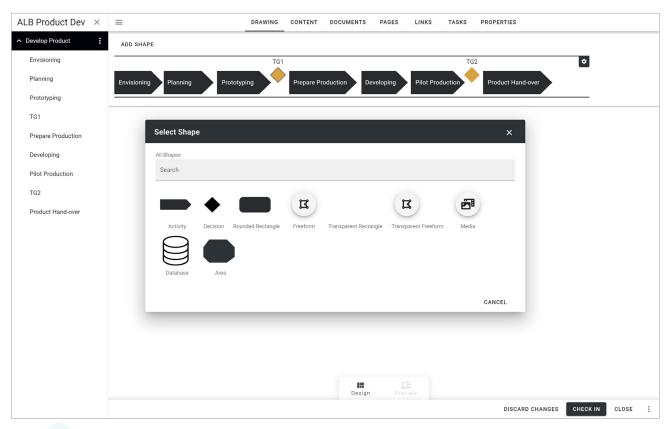


Example of a template for searching and browsing a product catalogue.



# Project and portfolio management in MS Teams

Omnia includes rich functionality for IT managers and project managers within an organisation to implement a structured approach to project management. At the basis are one or more project models that exist within the organisation, such as a product development process. These are defined within Omnia with the help of a visual process modelling tool, as shown in the screenshot. A description of each process step can be added, as well as standard templates and tasks that need to be executed as part of each step.

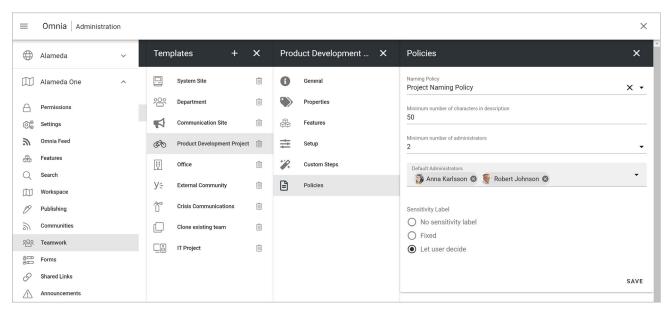


Setting up a flow diagram for a new project model.

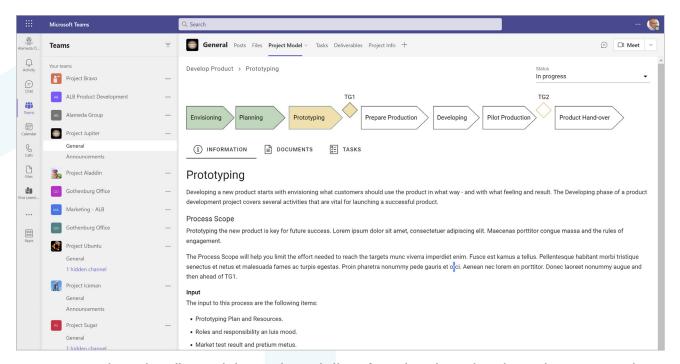


When setting up a provisioning template for project work, an administrator will define policies such as a project naming policy. Microsoft 365 sensitivity labels can also be applied at this stage.

When a new project is started using the previously created project model and template, the project is set up in MS Teams and the predefined channels and top-level tasks are automatically created. The flow diagram of the project model now becomes interactive and clickable. For each process step, tasks can be assigned to project team members and will be created in Planner. There is also a 'Project Centre' overview where everyone in the organisation can learn more about the project models, and get an overview of current and past projects.



Administrators can set up a provisioning template that includes policies about naming convention, as well as sensitivity labels.



In MS Teams, the project diagram is interactive and allows for tasks to be assigned to project team members.



# THINGS TO BEAR IN MIND

Omnia is a very flexible tool that gives admins a lot of power to control how their intranet looks and feels. However, this flexibility brings some complexity to admin screens that will take time for users to get used to. Therefore, tooltips or other features to help guide admins would be welcome.

Content creation is simple and results in attractive, well-targeted pages, but we feel that Omnia could go one step further to deliver a truly exceptional experience for communicators. For example, page building comes with a lot of features to consider, making it less intuitive than standard SharePoint, and the Editorial Centre could be further enhanced with richer calendar features. In other areas of the product, such as the media picker or the Learning Centre, the user experience is excellent, so we'd like to see more of this across the board.

Omnia has a lot of rich functionality, so organisations should take time to carefully plan how they are going to use it. The amount of flexibility and features may feel overwhelming at times, which risks features going to waste. Omnia does include a setup wizard where smaller organisations can setup a basic intranet to start with, but mid-sized and large companies will want to explore the full functionality. It's also recommended to have a central team or individual assigned to maintain the site and its development.

There are a few gaps in the functionality compared to other products in this report. There is room for improvement around the built-in analytics, and the out-of-the-box integrations with business systems are mainly read-only. We would like to see a richer user experience with the possibility to interact with the content directly in Omnia.

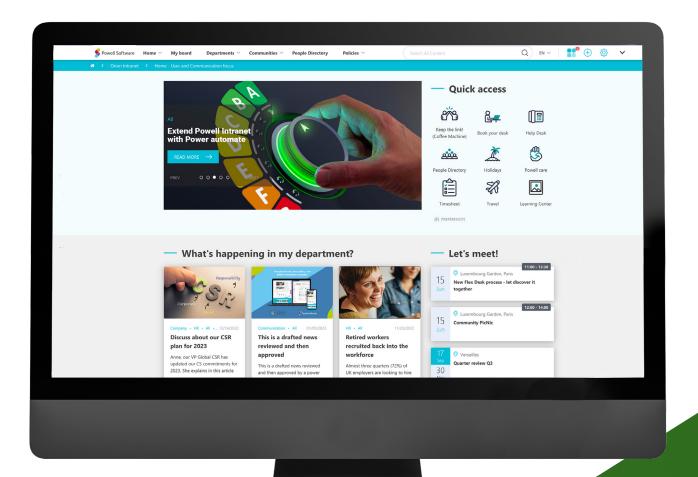
It's also worth noting that Omnia provides an admin and editor experience that's very unlike SharePoint, which is not a bad thing but may take adjustment from people used to working with standard SharePoint. Overall, however, Omnia is a compelling and flexible product at a good price point that will likely appear on many buyers' shortlist.

# Why choose this product

Omnia is a feature-rich, flexible product that caters to the needs of a wide range of organisations. While it is possible for smaller companies to set up a basic intranet quickly, Omnia will mainly appeal to large organisations with complex needs. The product integrates well with other Microsoft 365 products, and the MS Teams and Yammer integrations especially stand out. Also worth mentioning, and confirmed by customers in the Voice of the Customer section, is that the user interface and page load times are very fast, making the product pleasant and productive to work with.







# Our view in one tweet

@PowellSoftware's Powell Intranet is a highly capable intranet platform with powerful governance and many social and engagement features.



# Powell Intranet owned by Powell Software

Powell Intranet from Powell Software (Paris, France) provides a flexible basis for a Microsoft 365-based digital workplace. The intranet is built on top of SharePoint but it supports substantially broader opportunities, including employee advocacy, ideation, gamification, and frontline worker engagement. It is well-suited to medium to large organisations wishing to address intranet complexity in a consistent way, but is also competitively priced for smaller organisations.

News items as well as page content can be easily and attractively designed, supported by a long list of Powell's own web parts. There is a powerful site deployment and governance tool called Powell Manager. This enables the intranet to be implemented quickly, and it helps to ensure consistency as it grows post-launch. There is

also a mobile app which reflects the functionality of the desktop intranet, and another cut-down version of the app for frontline workers who are not covered by a Microsoft 365 licence.

The solution will be most useful when deployed alongside collaboration in MS Teams. Integration with third-party enterprise systems is limited out of the box, but much can be achieved using Power Automate and third-party connectors. To get the most out of the platform, companies will need trained administrators or partner organisations to support them, and be prepared to make clear design choices about when and how they will use Powell Intranet features alongside SharePoint's. For smaller organisations, Powell provides ready-to-go templates that are quick to deploy and get started.



# Summary table of scenario scores

# NO. SCENARIO/SCORE User experience and visual appeal 1 Mobile and frontline support 2 Internal communication 3 Community and engagement 5 Information finding and knowledge management 6 Admin experience and governance **Analytics** 7 8 Digital workplace integrations Microsoft 365 integration 10 Wildcard

#### **Pricing**

#### **PRICING MODEL**

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational Institutes, government / public sector, multi-year commitments, businesses over 20,000 users.

Price includes: Training for admins, customer success services, maintenance, product support, editor manuals, updates and upgrades, choice of modules / add-ons, hosting, access to a community & webinars.

# Key benefits

- News management is feature rich, with a smart mix of targeting news to specific audiences and
  offering end users the flexibility to set their own preferences.
- The product includes a large number of well-designed templates for sites and pages, making it quick and easy to deploy a highly usable intranet.
- The mobile app is highly customisable, supports flexible notifications and serves as a hub for thirdparty apps.
- Various attractive features for employee engagement and recognition are available.
- Powell Manager provides powerful back-end functionality to administrators to oversee deployment and management of templates and site collections.

# Improvements and considerations

- Basic administration is available in the front-end of the product, while advanced administration is done through Powell Manager, which is a feature-rich, complex tool that requires some level of technical expertise and comes with a learning curve.
- There are not many integrations with non-Microsoft 365 systems that come out of the box; customers will have to rely on third-party connectors becoming more available for integration via Power Platform and the Viva dashboard.
- Powell Intranet's analytics are strong but rely on different technologies, including Google Analytics, which some organisations may prefer not to activate on their intranet.





# **Product type**



# **Branding opportunities**



# Target businesses



**SMALL** less than 1,000 people



**MEDIUM** 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems



Fully standalone



Requires SharePoint



Optionally works with SharePoint



Other

# **Sectors**



Science and pharmaceuticals



Public services, government and administration



**Healthcare** 



**Engineering and** manufacturing



Business, consulting and management

You may also be interested in...







# **COMPANY AND PRODUCT**

# Company details



# **Company**Powell Software

# Company founded

2015



#### Company locations

Paris, France (HQ), USA, UK, Germany, Australia, Dubai



#### ISO 27001 certified

Software runs in Azure which is compliant with ISO 27001: 2013 controls.



#### Typical client size

Range varies from 500 to 100,000 employees; typical size is 1,000-5,000 employees.



# Largest deployment so far

100,000 users 1 country. 60,000 users 20 countries



#### Partner locations

Global, please see <u>their website</u> for details.



#### Customers

Clients include: La Poste, Quest Diagnostics, Carl Zeiss, Groupama, SNCF. Please see their website for more.

# Product and technical details

Name of product	Powell Intranet
Product launched	2015
Current version	082022
Accessibility	WCAG 2.1 compliant





#### Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant

Other

#### **Data residency**

While Powell Intranet is on Powell Azure's tenant, client's data remains in Microsoft 365 customer tenant. Therefore data always resides in countries covered by Microsoft.

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active Directory

ADFS

Open ID

Oauth

G Suite

Other

#### Search technology

Apache Lucene/ Solr

Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

#### Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

#### SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

#### Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other



#### Reverse-out options

Powell Intranet is fully based on Microsoft SharePoint and follows Microsoft best practices. When clients stop the product, no migration of the data is required, they keep everything in their Microsoft 365 environment. The only step is to remove Powell Intranet assets and replace them with native SharePoint components where needed. This can be easily done and industrialised with Powell Manager.

#### Languages supported

Powell Intranet supports all Microsoft 365 available languages, with advanced translation in these languages: English United States, French, Chinese, Italian, Spanish, Lithuanian, Bulgarian, Czech, Danish, German - Germany, Greek, Croatian, Hungarian, Japanese, Dutch, Polish, Portuguese - Brazil, Portuguese - Portugal, Romanian, Russian, Slovak, Swedish, Turkish, Slovenian

#### Machine translation

Yes - via the product

#### Right to left script

Yes

# Set-up and support

#### Set-up process for new clients

A customer tenant is created by Powell Software. Then customers decide to deploy either the standard portal (few clicks) or decide which levels of customisations they need (from adapting the various site collections templates to fully customising the look and feel, and metadata structure). Full deployment can vary from 2-3 hours for a packaged site for a small business to 3 months for large multinational companies requiring customisation.

#### **Product updates**

Monthly updates as a SaaS solution.

#### Product update process

Customers updated at once as a SaaS solution.

#### Technical support

Business hours technical support by email and phone for standard services are included in the SaaS subscription. Extended hours support is possible as an extra billed option. Local support possible through Powell Software partners.

#### **User community**

By default, all customers have access to the online community portal with documentation, best practice sharing and user voice forum. A community of medium and large customers also have regular private webinars and specific events.



#### In their own words

Powell Software says: "Powell Software is on a mission to help companies meet the challenges of the hybrid workplace: improve employee engagement and productivity thanks to a digital workplace solution that's accessible to all. Our Digital Workplace is based on two pillars Powell Intranet and Powell Teams."

# Their view of the marketplace

Powell Software says: "Powell Intranet, the Intranet pillar of our digital workplace platform, encompasses employee engagement & communication. It is developed upon Microsoft 365 services so your data stay secure in your tenant; it can address all employees including Frontlines workers."

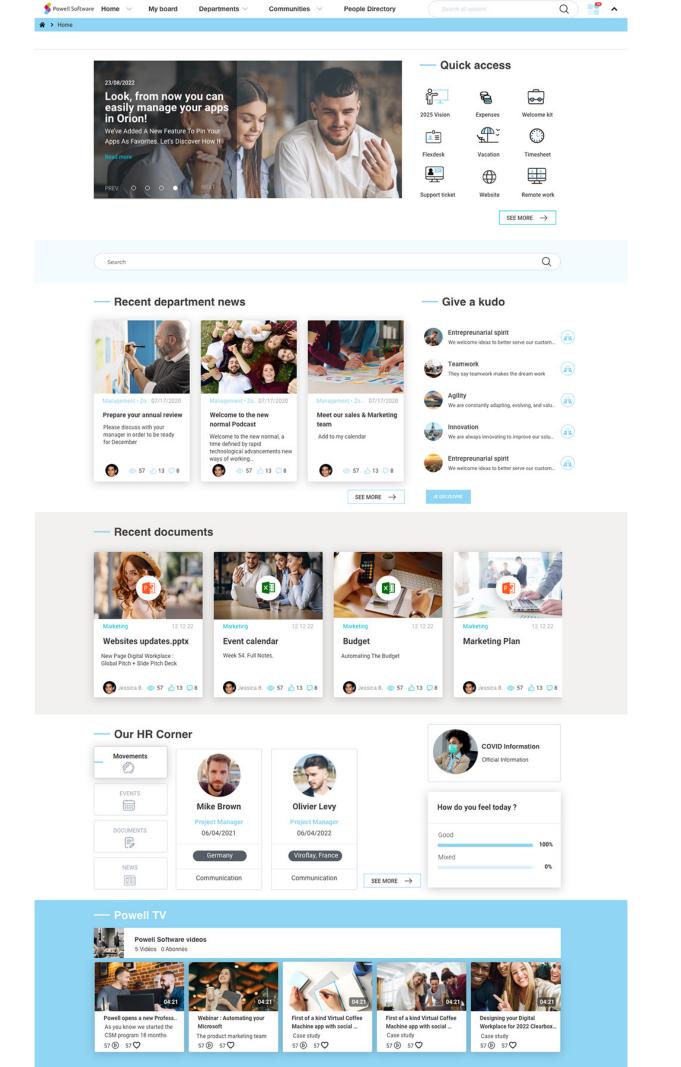
#### Voice of the customer

When asked about what's best in the product, customers mention a variety of features, but the quality and quantity of ready-to-use templates stands out. Customers appreciate the richness of the use cases that are covered, and the attention paid to user experience. "The templates reflect the collective expertise of industry leading designers and UX" says one customer, while another says: "I love the sleek designs and layouts, it significantly reduces the time to build and deploy an intranet." Other features that customers like are "good management of news", "a large base of adaptable functionality" and also that it's "not expensive".

Improvement suggestions are primarily about the complexity of administration. Several customers find the back-end admin tool called Powell Manager complex and somewhat dated. "A more ergonomic administration interface" is what one customer would like to see; another customer is more explicit, "the back-end software (Powell Manager) is rather complex and would need a refresher: a cleaner interface and better functionality". Powell acknowledge this and say that they are gradually revamping the user interface of Powell Manager to make it more contemporary and easier to use. Another customer also expresses concerns about configuring the web parts in the front end of the product: "I would like a simpler way to edit Powell web parts. It can get a little tricky to self-manage for someone who is not overly technical."

Not all customers have a direct experience of working with Powell, as the product is often implemented by an implementation partner. Those customers that did have regular interactions all have a very positive impression. "Competent, professional and available" and "responsive and proactive" were some of the comments we received. Customers explicitly praise the technical and implementation teams: "A very responsive technical support and an attentive customer success team; good knowledge of M365 and how we can make things work in a connected environment."





## **REVIEW**

#### 1. User experience and visual appeal

SCORE 3.5+

Intranets created on Powell are capable of a clean and contemporary look and feel. The product is built on modern SharePoint, but it is possible to hide the top SharePoint bar and the left-hand side icons, avoiding potential confusion for end users. A range of well-designed, modern web parts is available to choose from, and Powell Intranet comes with several predefined themes and templates to get going quickly. At the top right in the navigation bar sit a series of role-

targeted buttons where end users, publishers and admins get access to personalisation and configuration options. This includes an area for accessibility support, where users can adjust contrast and fonts.

A top-level mega menu persists across site collections, replacing the standard SharePoint menu. The menu system is managed in the front end of the product in a visually intuitive way, without requiring access to Powell Manager (see Scenario 6 for more). Images can be added to the menu to increase the visual appeal. Menu items can be displayed according to a user's role, department, or location, based on SharePoint or Azure AD groups. There is also an option to build more sophisticated queries and rules for very precise targeting.

Notifications are nicely brought together under the tools icon in the top-level navigation. These are highly configurable and show some or all news, events, document updates, and MS Teams and Yammer discussions. The mobile app allows users to configure which notifications they want to receive, we would like to see this functionality also in the desktop environment. As an optional extra, Powell will work with WeAdvocacy to create alerts directly on the Windows desktop.

The standard branding options in the product are based on SharePoint themes and are extended in Powell Intranet with additional capabilities. Themes can easily be adapted through an intuitive user interface, and it's equally intuitive to create and switch to temporary or seasonal themes. Complex organisations that want to go beyond the standard functionality will typically do so with the help of a partner; we were shown some visually attractive examples that show the power of what can be achieved.

Overall, there are many features and configuration options within the Powell Intranet interface. Careful planning will be needed so that tools are used purposefully and selectively.



#### 2. Mobile and frontline support

SCORE 2.5+

Powell Intranet offers a fully responsive site and also includes a dedicated mobile app for iOS and Android. The standard app requires a suitable Microsoft 365 license, but there is also a version of the app for frontline workers without license, using the free features of Azure AD for identity management. The app is available for download from the public app stores and will recognise automatically at sign-on time if a Microsoft licence is present or not, and

configure accordingly. A QR code can be generated and distributed to frontline workers through various channels, to make the process of downloading the app even easier. Customers need a premium licence to customise their app's name and logo, and deploy it to managed devices through their MDM solution.

The content and the functionality offered within the mobile app is highly configurable. By default, a number of icons are available at the bottom of the screen, leading to typical areas such as people finding, notifications, and search. The content pages within the app can be designed independently from the desktop site, to make them crisper and better suited to mobile users. For organisations that prefer not to use the dedicated app, the responsive site can be fine-tuned to some extent. Many of the Powell Intranet web parts can be configured to behave differently, for instance by displaying fewer news items on mobile than on desktop.

There are some specific services for frontline workers included in the product, such as a leave request and a site inspection tool that have been implemented as Power Apps, but these are only available to licensed users. The app also has the ability to include notifications generated by third-party applications such as ServiceNow.

Administration of the app is handled within the back-office tool Powell Manager (see Scenario 6 for more). There is some complexity involved in understanding and using Powell Manager, and some of the settings within the app are not inherited from the desktop version so need to be configured separately. Powell say that the setup of the mobile app is typically handled by an implementation partner as part of the client engagement process.

#### 3. Internal communication

SCORE 3.5+

Creation of new content, including news articles, starts from the 'create' sign in the top navigation, visible only to authorised content creators. Powell's approach is to guide authors through the news publishing process with an article template. The template prompts them for the title and description, as well as metadata for targeting purposes, such as department, location, and topic. The template also includes optional steps to translate the article into other

languages and to generate notifications.

Content owners have access to a 'My Contributions' board that shows content and news they own, along with details including approval status. These boards can be configured to show content owned by a team or the whole organisation, but there is no calendar view to help with communications planning. Approval workflows are handled by Power Automate.

The ability to target content and to let users control their feed of news goes well beyond standard SharePoint and is an area of strength for the product. Authors can add tags to target



their articles to a particular department or location, or target based on Azure AD groups. On top of this mechanism, end users have the option to set their personal preferences. They may be interested in news from departments and locations other than their own, or wish to follow news about selected topics. User preferences are set within the news web part and not in the user profile, which is unusual and easily missed if not explained.

Alerts can be created to display a message in a banner at the top of the site, and a push notification on the mobile app. A nice addition would be to include an option for employees to confirm that they have seen the message and to leave a comment, for instance confirming that they are safe. A good feature is a well-designed template for a crisis management site, to be activated when needed.

Once published, there is an option to share news stories into a Teams channel, into a Yammer group, or by email. An employee advocacy page provides a news feed for external sharing on social media. News items can also be aggregated into a newsletter digest using the standard SharePoint functionality or using the optional module offered in partnership with WeAdvocacy. Other options, such as integration with a digital signage system, are not part of the product, but could be achieved by a third-party provider via Power Automate.

#### 4. Community and engagement

3.5+

Powell Intranet supports various opportunities for community, engagement, and recognition. Communities are created using a template which by default uses Yammer but applies a more consistent design in line with the rest of the intranet. Optionally, the Yammer-based discussion feed is replaced by Powell Intranet's own discussion module, so organisations that don't use Yammer can still use the feature. Users can also like and comment on content pages and news articles

within the intranet, but richer social interactions are not part of the product. Powell say that this is on their product roadmap.

The product includes an ideation hub which enables users to submit ideas and respond to challenges. In a similar vein, a simple kudos feature allows organisations to set up their own kudos categories for employees to award to each other. Details about these features are in the Highlights section.

Powell Intranet also has a poll web part. Responses can be viewed in a SharePoint List and downloaded as an Excel file. Alternatively, contributors can run polls using MS Forms which provides more granular analysis but has a less tailored look and feel.

There is good support for gamification within the product. Various activities such as liking and commenting, sharing ideas, and posting on external social media enable users to earn points. Badges are awarded when a target is reached, and employees see their position on a leader board.

Some attractive features have been added to replicate the serendipity of office encounters. 'Water fountain' facilitates social discussions on non-work topics, such as music and pets, with icebreaker questions. The 'classified ads' module is another popular way to bring employees together. For those licensed for the separate Powell Teams product, another module is 'Coffee machine', which checks on team member's availability for a break time and randomly allocates them to an informal meeting with a colleague. We think all these features will be of interest to organisations wanting to drive employee engagement and networking across teams working remotely or in a hybrid setup.



## 5. Information finding and knowledge management

score 4

Users have access to the standard SharePoint search box if they wish, by switching a toggle in the top navigation bar. Powell Intranet provides its own enhanced search experience, also accessed in the top navigation bar. Having both search boxes accessible would be confusing, so Powell recommends keeping the SharePoint search box hidden. There is a choice to search either the entire intranet, or to filter by news, documents, or people. The search

results page is well designed using an attractive card layout; it is more visually appealing than the standard Microsoft results page. Filters and refiners are easy to add based on the tags that have been set up. Powell Intranet includes contextual search boxes on many of its templates, such as a document repository.

Overall, we like Powell's approach to search, although some improvements would be welcome. The management of most search functionality is to be handled within the standard Microsoft admin tools, and some of the Microsoft features, such as promoted results, are not supported in the Powell Intranet search experience.

People finding is fully integrated and follows the same card layout. Employee cards are similar to Microsoft's but include a few nice additions. We particularly like the integration with Powell Intranet's Flex Desk module (see Scenario 10) to show an employee's current location in the office, as well as tomorrow's reservation. Employee cards also include a user's position in the company hierarchy, but a fully-fledged organisation chart is not part of the product. There is a template called 'my board' for users to edit their profile. This displays information about each person including their projects, skills, and expertise, as well as their saved news, and their MS Teams channels. Profile completion can be gamified to encourage people to add more details.

Finding information is enabled in the product mainly through templates that display personalised information. For example, a documentation page displays a user's recent documents and documents that have been shared with them. A knowledge base can be created using additional tags, for example around product categories, to enable a document collection to be searched and filtered in a structured way. Finally, there is also a nice A-Z glossary template and an FAQ feature.

## 6. Admin experience and governance

3.5+

Powell Intranet provides a highly granular degree of control as well as significant options to configure the structure, behaviour and the look and feel. Global admins will use Powell Manager, a dedicated online tool that includes comprehensive provisioning and governance tools, ensuring that new sites and pages are deployed and managed in a controlled and consistent manner. Details and screenshots are in the Highlights section. It is a very capable

product, but the range of options also makes this an expert-level tool, and the interface is very different to SharePoint. Powell is currently in the process of reworking and modernising the user interface of Powell Manager, and they are also making some configuration options accessible to less expert users. For example, theme-switching can be quickly controlled from the front end. This allows a non-technical user to change a site to a temporary or seasonal theme.

Local admins can manage permissions on specific site collections for which they are responsible, by going to the 'Settings' icon in the navigation bar. Individual web parts can



be configured by editing a configuration panel. For each type of content, such as news or events, a content creation form will be set up in Powell Manager, so creating new content is straightforward.

Powell Intranet includes a personalised dashboard called 'my contributions' that provides a helicopter view of everything that a content owner has published over time. From this dashboard, content can be archived if needed, but there is no review date available, so it's not obvious to know which pages should be reviewed. There are also no workflows built into the product to notify content owners; Powell say that these can easily be added using Power Automate.

Powell Intranet supports multilingual content well. The intranet presents content in an individual's default language, and a dropdown is available in the top navigation bar to switch to another supported language. Powell Intranet makes sure that all elements on the page are translated, including web part titles and icon descriptions. The product also includes a nicely integrated auto-translate functionality using Azure's Translator Service.

## 7. Analytics

SCORE 3.5

Basic page level analytics is available on every page in Powell Intranet, very similar to what SharePoint provides out of the box. This includes a visit count for the last 7, 30 and 90 days, the most popular content, and traffic by device.

To go one step further, these intranet analytics can be merged with Google Analytics through a Power BI content pack, which can be downloaded from Powell's learning centre. This provides more useful data including page views

and average time per page, as well as usage by country, office, and department. There is an additional 'campaigns' tab on the Power BI dashboard, where internal communication managers can track the success of their news articles across the organisation. Analytics on search are partially integrated; an overview of most popular search terms is available in the dashboard, but other insights are only available in the standard Microsoft back-end search reports. There is also a separate report available dedicated to mobile app usage.

Powell Intranet also includes an insightful report on engagement, showing participation and amplification across internal and external channels such as Teams, Yammer, Facebook and LinkedIn. Reports can be anonymised to department level for areas where privacy is a concern. We particularly like how the report delivers actionable insights. For example, based on social sharing of content on particular topics, subject matter experts on those topics can be identified.

A 'mandatory read' feature is available through a content type called 'Must read document'. Like other content, it can be targeted to specific groups. Reporting is available to admins and for export to enable further data manipulation.

Overall, we believe that Powell Intranet provides a broad range of reports and valuable insights. It should be noted that some of these reports rely on the usage of Google Analytics, so these will not be available to organisations that prefer not to activate Google Analytics on their intranet.



## 8. Digital workplace integrations

2.5+

Apart from basic integration with services such as stock prices and current weather, Powell Intranet offers integration with third-party products in two different ways.

A first approach is through a generic integration web part which Powell calls 'universal connector' and which is based on an industry-standard REST API. Using this connector, the product includes a visually attractive integration with

ServiceNow. The status and the owners of tickets are retrieved and displayed in an intuitive card layout on the intranet. The cards are not actionable within the intranet though; clicking on a card brings the user into the ServiceNow platform. Powell say that this generic connector will work for any enterprise system, but apart from ServiceNow this has not been documented, so time and effort will be required to set it up.

A second approach is to use connectors in Power Automate. One area where Powell Intranet puts this technology to good use is by creating a social wall that brings together posts from Facebook, Twitter and Instagram onto a single page in the product. The same approach can be used to connect Powell Intranet to all the major enterprise platforms using their third-party connectors.

The product includes some basic integration with Box, but Powell say that very few of their customers use this feature, so it is not an area of focus.

When it comes to federated search, Powell Intranet does not offer any functionality beyond the standard Microsoft capabilities. Connectors exist on the market to link into major business applications, typically at an additional cost. Federated search across multiple tenants is described in Scenario 9.

#### 9. Microsoft 365 integration

SCORE 4+

SharePoint and Powell Intranet are tightly interlinked, so naturally integration on this scenario starts from a strong base. However, there are points where it is best for customers to choose one possible route and stick to it, for example Powell news or SharePoint news rather than mixing both.

The integration with MS Teams and Yammer is particularly strong. Content such as news articles can be shared into Teams, into Yammer, and also by

email (see also Scenario 3). The intranet can use Yammer or Teams as the basis for comments on news and other content. There is a web part to surface either a conversation in Teams or in Yammer onto any content page, and another web part gives an overview of all Teams and Yammer groups that a user has access to. By using Power Automate, notifications on Powell Intranet can be presented in MS Teams too. Powell also offers an additional payable product called Powell Teams, which goes well beyond the features described above; it includes a user-friendly dashboard and a powerful provisioning tool with predefined templates.

The integration with Viva is focused on Viva Connections. The dashboard and the feed from Viva Connections can be integrated onto a Powell Intranet page, but the look and feel is slightly different. Powell has also developed a number of specific adaptive cards for the Viva dashboard. There are cards to give kudos, to view birthdays, to register for an event, and to book a desk



through the Flex Desk module, which is discussed in Scenario 10. There is also a card that gives full access to the intranet.

Powell Intranet can usefully do a federated search across multiple tenants in Microsoft 365. Content coming from other tenants can be configured to display in a separate web part, for instance to bring news articles together on one page. This will be an attractive feature for many large organisations or for companies that have recently gone through a merger or acquisition.

Also noteworthy is the strong support and use of Power Platform throughout the product, especially as the platform of choice for creating integrations with third-party applications, as discussed in Scenario 8.

#### 10. Wildcard

SCORE 3.5

A key objective of modern intranets is to enable the hybrid way of working. Some features around engagement and recognition were already discussed in Scenario 4, but Powell has gone further and introduced a few specific tools within Powell Intranet that are targeted at facilitating hybrid work.

The most important tool in this area is the Flex Desk booking module. Flex Desk is in essence an integrated tool within Powell Intranet that allows employees to book a desk when they come to the office. An administrator will upload one or more floor plans and identify a number of zones, which are then automatically turned into bookable locations. These can be areas with individual desks or also meeting rooms. Employees can book their spot and will see which colleagues will be present on the same day at the office. There is a social feature to invite colleagues, and analytics are available to HR and facilities managers to track the occupancy and the number of days booked by employees.

Powell have recently extended the tool to include reservations for car parking spaces or any other type of bookable resource, for which customers have come up with creative use cases such as booking a table in the cafeteria at lunch time.

A second tool that equally supports hybrid working is a car-pooling application. By filling out a simple form, employees can offer car-pooling rides, and colleagues can book available seats in the car. A discussion feed is integrated, so that employees can get to know each other and ask more detailed questions about the ride.

We are pleased to see that Powell Intranet is evolving to meet the needs of the hybrid workforce. There are many commercial applications available for desk booking, but the benefit of Powell Intranet is that it offers a set of simple but extensible solutions as part of the product, at no extra cost



# **PRODUCT HIGHLIGHTS**

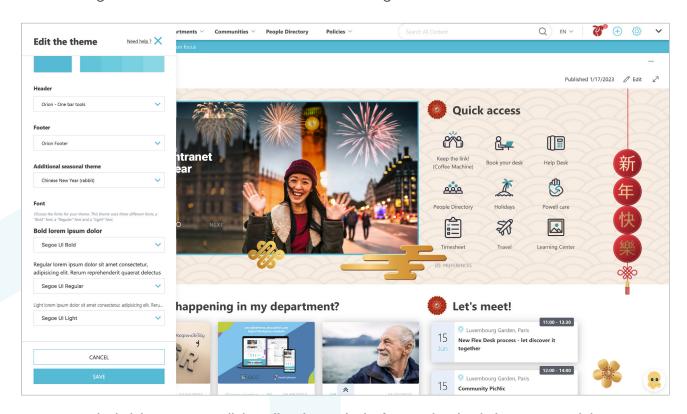
## Administration

Powell Intranet provides a useful combination of basic administration capabilities for content creators and local admins, and much deeper, more powerful administration which can be undertaken using Powell Manager. Some of the administration is handled in the front-end of the product by non-technical contributors or local site administrators. This includes the configuration of the site navigation and the setup of various branding themes.

Powell Manager provides the opportunity to customise theming and to build sites (using site and page templates) to a granular level. For small and medium-sized organisations, ready to use templates are quickly deployed. Large and complex organisations can customise much deeper and develop bespoke functionality as well as look and feel.

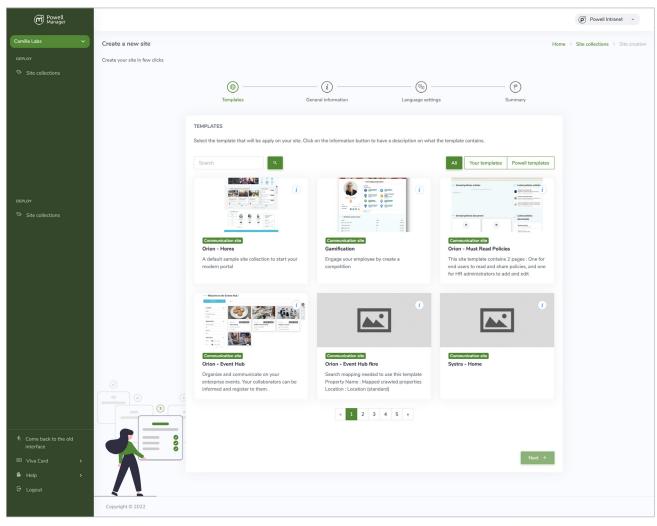
One of the strengths of Powell Manager is that admins can make changes to site and page templates and then redeploy them in one go to a complex intranet consisting of many site collections. Large organisations with a complex structure will find this an important time saver.

Powell Manager is a versatile tool for provisioning and managing an intranet and goes beyond what most other SharePoint-based products in this report offer. There is a learning curve, but there are significant benefits for admins who are willing to invest the time.

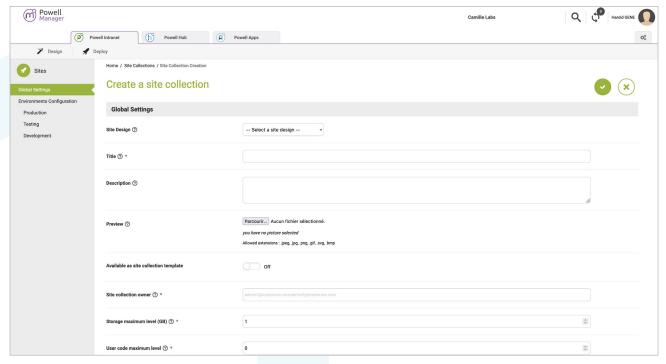


Local administrators can edit branding themes in the front end and switch to a seasonal theme.





Small and medium-sized organisations can create a new site based on predefined templates.

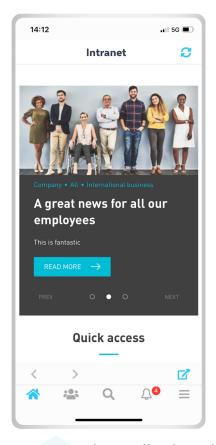


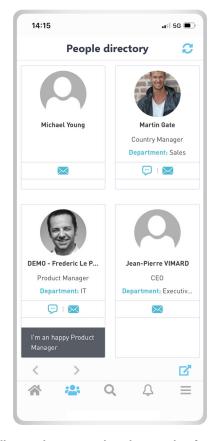
Large and complex organisations can create a highly customised setup.

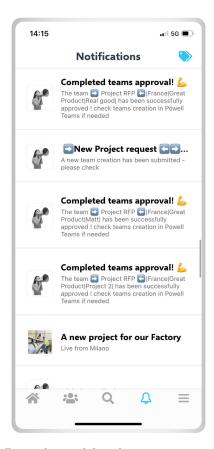


## Mobile app functionality

Powell Intranet's mobile app is presented with a clean, simple interface and a straightforward menu. As well as presenting content including news, documentation, and a people directory, there is a search option, and an opportunity to add business applications. Users can personalise their experience by adding their own quick links.



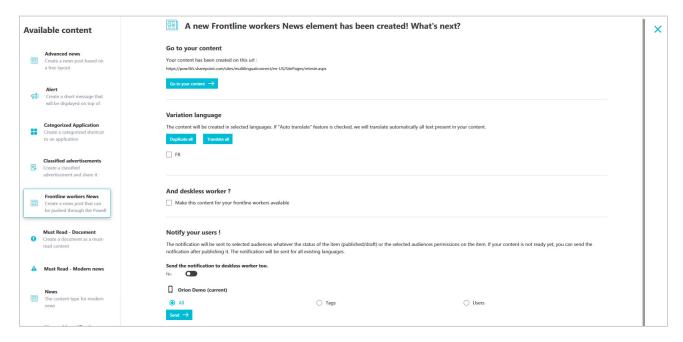




The Powell native mobile app is targeted at the needs of mobile workers, giving them access to relevant news, a people directory, and notifications.

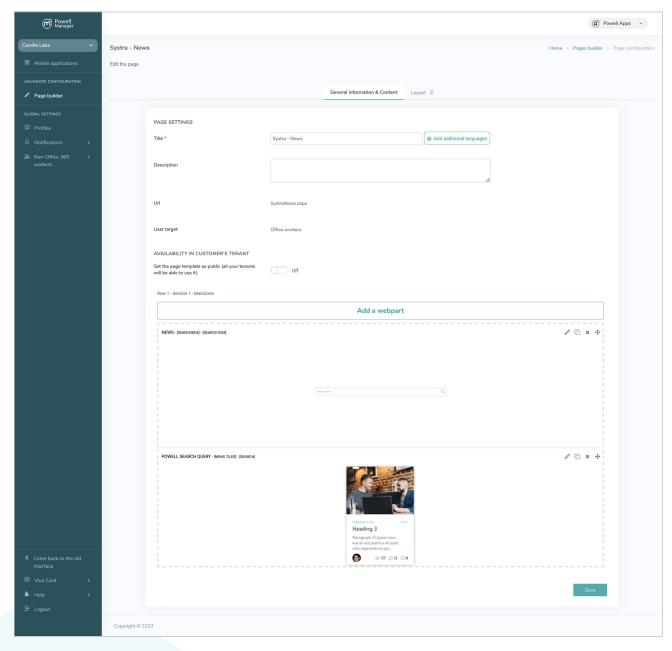
Most of the functionality and content within the app, including news articles, is also available to frontline employees without a Microsoft 365 licence. When creating a news article, content authors have the option to explicitly target news to frontline workers.

We were also impressed by the administrative capabilities, integrated within Powell Manager, which are provided to easily change the design of the mobile app. Pages within the app can be individually designed, independently of the page templates for the desktop version, which makes it possible to deliver crisp content pages optimised for mobile.



At creation time, news can be targeted specifically to frontline workers using the mobile app.



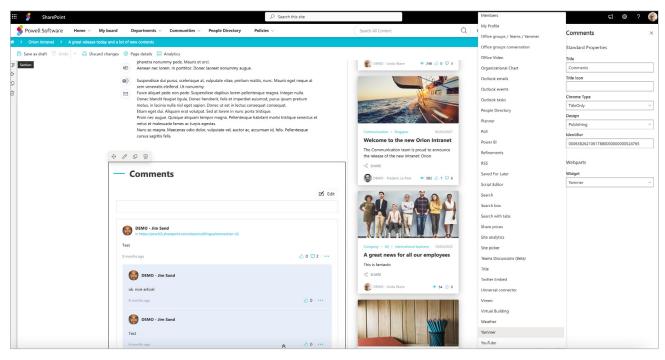


Using Powell Manager, administrators can setup dedicated content pages for the mobile app.

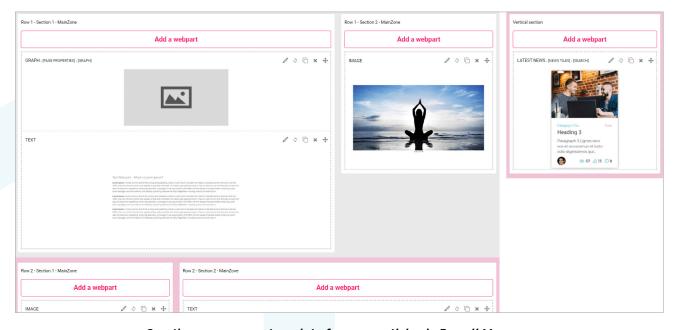


## News creation and targeting

Powell Intranet makes news creation very easy, both for inexperienced content creators but also with more advanced news capabilities available for communications managers. News templates and pages are created in Powell Manager, leveraging an extensive range of both SharePoint and Powell Intranet web parts to ensure news is presented attractively.



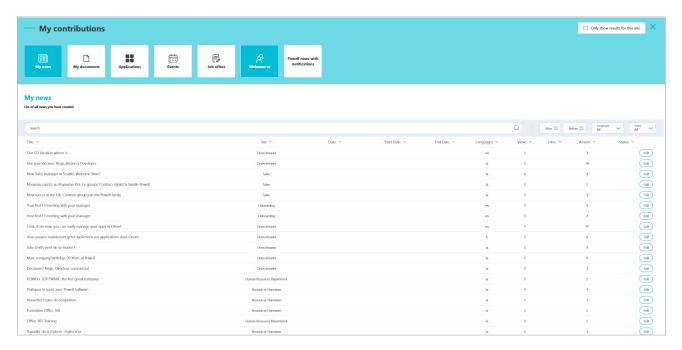
Selecting Powell Intranet web parts for adding to advanced news pages.



Creating a new page template for news articles in Powell Manager.



Content authors have access to a dashboard called 'My contributions' which presents an overview of all the content and news that they own. This provides a useful helicopter view from where to manage their content.



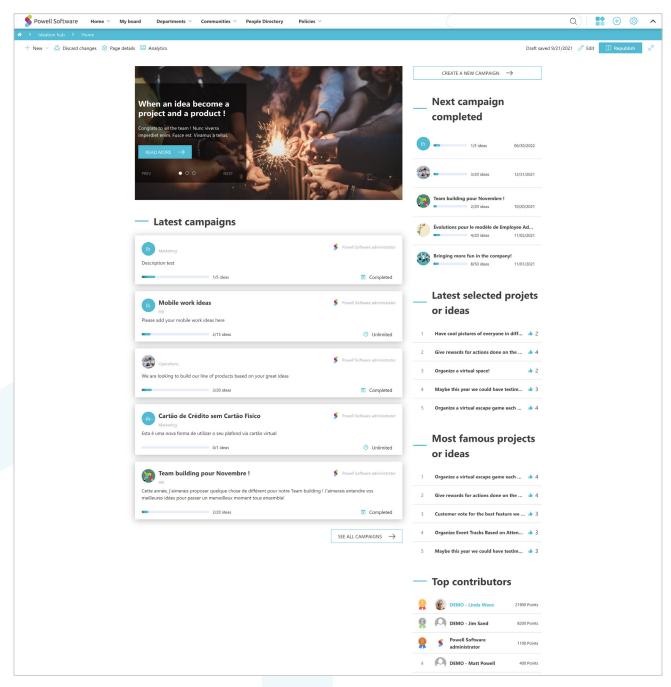
Content authors can manage all their content from an intuitive 'My contributions' dashboard.



## **Engagement and recognition**

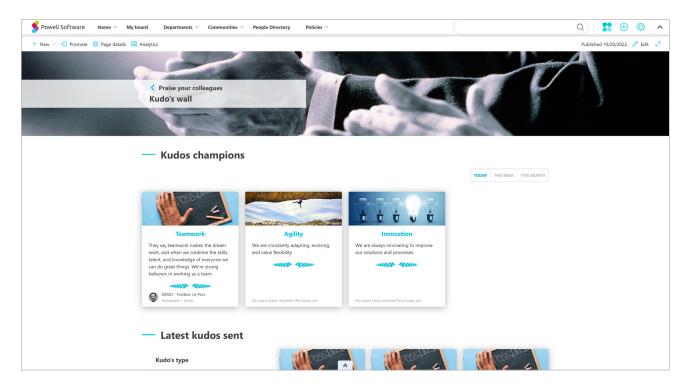
Powell Intranet includes several well-executed features and templates to help organisations with employee engagement and recognition. A feature-rich ideation hub is a first example. Ideation campaigns are set up by authorised contributors, while any user is able to view current and previous projects or campaigns, and most popular (liked and commented) ideas. Users can create a page to share a new idea – they don't need to be a contributor. Users may like, comment and share ideas also in Yammer or Teams. The creator of a campaign will review all ideas, shortlist some for further evaluation, and select winning ideas for implementation.

The 'kudos wall' is an attractive template to highlight kudos that has recently been awarded, and to celebrate kudos champions. Organisations can set up different kudos categories, for instance to reflect their corporate values or strategic areas of focus.



An overview of all campaigns and ideas within the ideation hub.



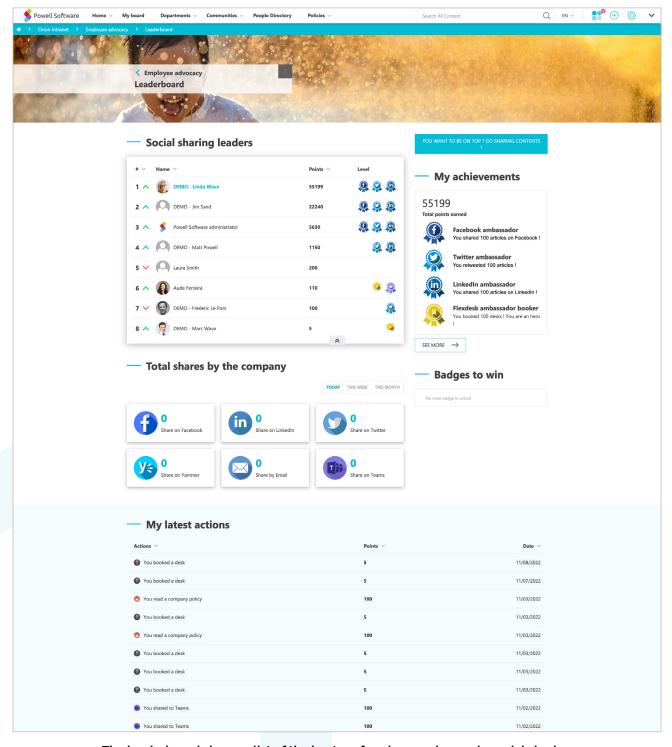


A kudos wall shows all kudos recently given, as well as the organisation's kudos champions.



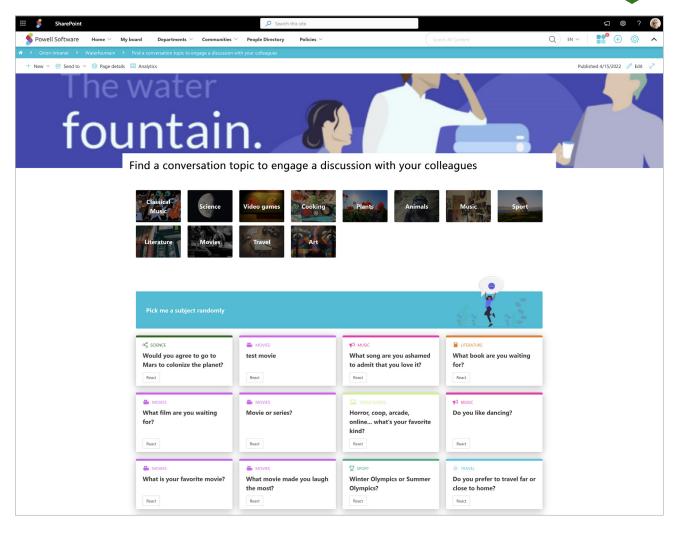
Powell Intranet also includes a set of gamification features. Employees earn points with various activities across the intranet and will receive a badge when they achieve a predefined target. In the screenshot below, a leaderboard template shows the best performing employees when it comes to social sharing – both internally and on external social media.

A final example that we particularly like is a watercooler feature, which Powell calls 'The water fountain'. This is a collection of discussion communities around non-work-related topics, brought together in a single place. For each topic, a number of ice breaker questions are proposed to get the interaction started.



The leaderboard shows a list of the best performing employees in social sharing.





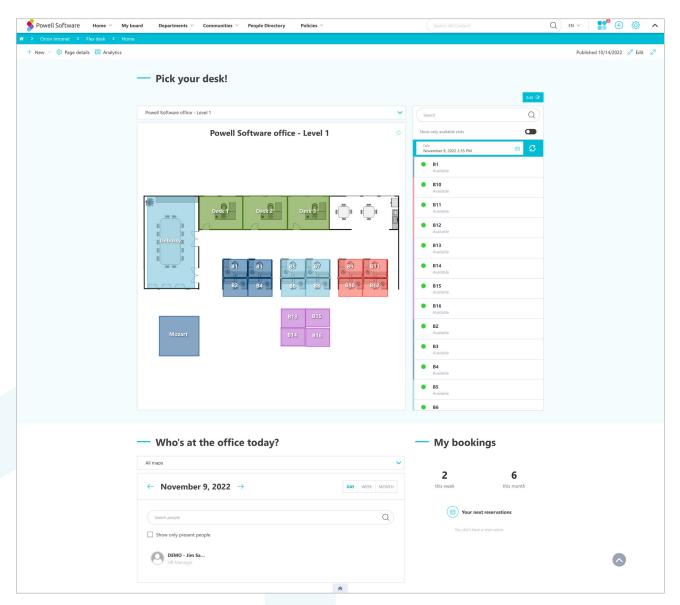
The water fountain stimulates discussion about non-work-related subjects.



## Support tools for hybrid work

Powell Intranet includes a few specific tools that support employees in the model of hybrid work. The product offers a versatile desk booking tool called Flex Desk. Originally designed to be a simple tool for employees to book a desk or a meeting room when coming to the office, it has been extended based on customer feedback to include other bookable resources such as spaces in the car park or tables for lunch in the cafeteria.

At the core of the product are a number of floor plans that need to be uploaded by an administrator. These are then divided in the tool into different zones, such as meeting rooms or open space areas, and are turned into bookable places. Flex Desk can be conveniently placed on the home page as one of the applications in the 'Quick Access' area, in the native mobile app, and in a Powell-provided card in the Viva Connections dashboard.

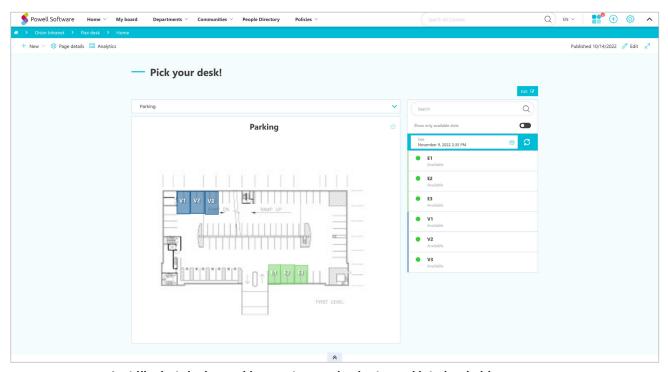


Floor plans are divided into zones that become bookable areas.

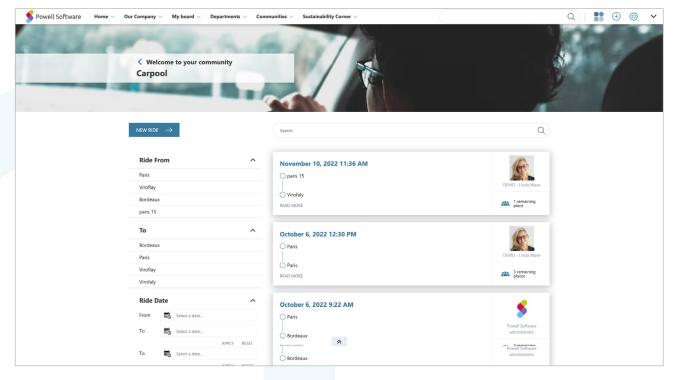


The same logic can be applied to other spaces such as a parking garage with bookable car parking spaces, as illustrated in the screenshot below.

Another tool in support of hybrid work is the car-pooling application. It comes with a simple form for employees to fill out if they have a car-pooling ride to offer; information to be provided is date and time, start and end point, and number of seats available. Colleagues can book an available seat or can go to a discussion area to ask additional questions.



Just like hot desks, parking spots can also be turned into bookable resources.



A simple carpooling application allows employees to view and filter available rides.



# THINGS TO BEAR IN MIND

Powell Intranet is a well-rounded product that will help Microsoft 365 customers expand SharePoint's functionality, providing a much-extended set of tools and a more flexible look and feel. Most of this rich functionality is managed in Powell Manager, which offers extensive opportunities for deploying and managing complex intranet sites that will be daunting for less technically-minded administrators. Making the most of Powell Manager will require a well-trained internal resource or a partner to support smaller organisations. Powell is working to make the user interface of Powell Manager more approachable, but even then there will be a learning curve.

In the area of integration with third-party enterprise systems, the product's out-of-the-box offering is limited. More can be achieved by using third-party solutions such as connectors in Power Platform, but these will come with an additional cost and effort.

Powell's analytics are strong, with some very capable and actionable dashboards, but the various reports rely on different technologies and are not well integrated. Some reports require Google Analytics to be activated and will therefore not be available to companies that prefer not to use Google products.

Powell relies on its extensive partner network to handle most implementations. Choosing the correct partner to work with will be a key factor for success – as important as choosing the right product.

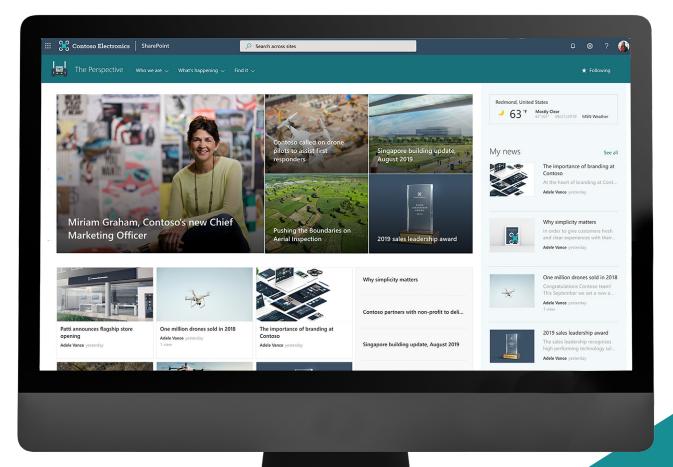
## Why choose this product

Powell Intranet is a product that will be of interest to a diverse range of organisations. Small organisations will like the simple and attractive user interface and the many ready-to-go templates to build a new intranet quickly. Pricing for small organisations is also attractive. Large and complex organisations will be impressed by the richness of the functionality and by the power of Powell Manager. Powell Intranet will also be particularly relevant for companies wanting to link their intranet's capabilities with broader collaboration in MS Teams. Such companies may also consider Powell's other main product, Powell Teams, as a complement to Powell Intranet.









# Our view in one tweet

a SharePoint out of the box lets you create simple and attractive intranets quickly and easily. Viva Connections adds an extra dimension to Teams, but at a corporate scale SharePoint and Connections can both be challenging to govern.



# SharePoint Online and Viva Connections owned by Microsoft

SharePoint Online is positioned by Microsoft as 'the intelligent intranet'. It offers a modern, highly flexible approach to employee communications, as well as powering many elements of Microsoft 365 behind the scenes. In 2021, Microsoft also released Viva Connections as a way to surface SharePoint intranets within Teams and tying-in Yammer for social interactions. As many customers will already have these elements in their Microsoft 365 licenses, we have evaluated SharePoint. Yammer and Viva Connections as a single package for a corporate intranet.

Out of the box, standard SharePoint Online is attractive and the basics are relatively easy to use for small-company set-ups, making it simple to get

going. To create a basic intranet, communication and hub sites offer a friendly editing environment that makes it straightforward for site owners to change layouts. Viva Connections extends this ability with a dashboard for tools, a targeted news feed and the ability to integrate a SharePoint intranet into Teams. It meets a perceived need to 'take the intranet to where the users are', though we feel the implementation is currently a little clunky, especially the navigation aspect. The mobile experience in the SharePoint or Teams app is not an intranet as many would expect but does reflect the collaboration aspect of Microsoft 365 well.

Despite all the feature advances, SharePoint and Viva Connections remain a complex platform to build and run an



intranet on once it reaches any kind of size. The newer functionality is slick and well designed, but under the hood, power users will often bump into older components that are confusing and disjointed.

Internal Comms pros may find SharePoint frustrating as its default model is to aggregate news from many diverse sources, rather than push news from a central 'authoritative' voice out to many end points. The ability to create a professionally curated news experience also requires careful planning. In contrast, smaller companies with limited resources may welcome this level of automation, as SharePoint does a good job of keeping the home page fresh by using algorithms to pull in new content from across the intranet estate.

Smaller companies can do much with the built-in features but may find they have to buy in expertise to fully exploit them or if more than a small set of sites are required. Medium to large organisations are likely to hit limitations around customisation and governance. However, these are not necessarily show-stoppers, and many companies decide they are happy to accept these constraints in return for something that integrates well with other parts of Microsoft 365 and is covered by their licenses.

Notes: We invited Microsoft to demonstrate their product to us using the same process as other vendors, but they were not available to participate. We've therefore independently reviewed the product based on our many years of working with SharePoint and Teams, and with support from Jason Sirockman at iomer internet solutions inc. Iomer are Microsoft Partners and highly experienced in intranet deployments.

Both Microsoft 365 and Office 365 are mentioned here. Our review is based on Office 365 E1 licenses, so we use "Office 365" in our scenario commentary where applicable. However, some components are always called "Microsoft 365" regardless of your license, such as the "Microsoft 365 Admin Center". For the user-focused scenarios we list here, the review applies equally to E1, E3 or E5 on Microsoft 365 or Office 365 with only some very minor differences. We hope this isn't too confusing - but if it is, please blame Microsoft.



## Summary table of scenario scores

NO.	SCENARIO/SCORE
1	User experience and visual appeal
2	Mobile and frontline support
3	Internal communication
4	Community and engagement
5	Information finding and knowledge management
6	Admin experience and governance
7	Analytics
8	Digital workplace integrations
9	Microsoft 365 integration
10	Wildcard

#### **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription - price based on number of users.

#### **PRICING NOTES**

Based on E1 Office 365 license, which also covers Teams, Exchange and more. F1, a limited license for frontline workers is much cheaper. Substantial non-profit discounts. Full pricing details.

## Key benefits

- Many companies will consider SharePoint 'free' as they already have Office 365 or Microsoft 365 licenses.
- The modern UX makes it easy to change layouts and add content.
- The real power of a SharePoint-based approach comes from the flexibility of combining it with other 365 tools such as Power Apps, Yammer and Viva Topics rather than SharePoint per-se.
- · Viva Connections brings an intranet into Teams both on the desktop client and in the app.
- The dashboard component for Connections has potential for integrating many employee services with suitable further development.
- Microsoft releases improvements very regularly and gives good visibility of its roadmap, as well as being a trusted host of corporate data.



#### Improvements and considerations

- Many organisations still find they need external help to configure an intranet appropriately.
   Even if no coding is required, getting SharePoint to work as hoped can require deep technical know-how.
- SharePoint and Viva Connections work best when approached as many small sites loosely gathered into a portal; companies looking for a cohesive corporate intranet with a top-down architecture will find it more challenging.
- The mobile experience is improving, but Microsoft's apps do not prioritise an 'intranet home page' in the sense that many would expect, particularly Internal Communicators.
- Internal communicators may be frustrated by the absence of any central news hub approach

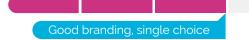
   instead news creation tends to be fragmented across many sites and users rely on machine curation to try to highlight what is most important.
- Very limited analytics are included. Reporting is further fragmented by the reliance on multiple underlying tools to build an intranet experience: a site may use elements of SharePoint, Stream, Yammer and Teams, but each of these have their own analytics.
- There are few tools to help govern site design and proliferation, and many companies struggle with this as their use of Office 365 matures.



## **Product type**



## **Branding opportunities**



## Target businesses







## Base systems



## **Sectors**



# **COMPANY AND PRODUCT**

## Company details



#### Company

Microsoft Corporation



#### Company founded

1975



#### **Company locations**

Global; headquartered in Redmond, USA



#### ISO 27001 certified

Yes



#### Typical client size

Not disclosed



# Largest deployment so far

Not disclosed, but probably Accenture (480,000 employees). Several companies over 200,000 employees.



#### Partner locations

Global



#### Customers

190 million users across 200,000+ organisations. Over 85% of Fortune 500 companies use SharePoint, including Bank of America, Wells Fargo, JP Morgan, Unilever, and ExxonMobil.

## Product and technical details

Name of product	SharePoint Online & Viva Connections
Product launched	2001
Current version	NA for Online (SharePoint Server Subscription Edition for on- premises)
Accessibility	Microsoft doesn't make absolute claims, but do <u>publish detailed</u> <u>conformance reports</u> and meet most criteria.



#### Deployment

Client onpremises\* Client private cloud

Microsoft Azure Amazon Web Services

Vendorhosted Microsoft 365 tenant

Other\*\*

\*on-premises version differs substantially from that reviewed here

#### Data residency

Many country data centres available but defaults are EMEA, APAC and Americas.

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

<b>Azure Active</b>
Azure Active
Directory
Directory

**ADFS** 

Open ID

Oauth

G Suite

Other

#### Search technology

Apache Lucene/ Solr Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

#### Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

tions

#### SharePoint/0365 versions supported (if applicable)

SP Server 2016 SP Server 2	SP Server Subscription Edition	SP Online	Viva Connec
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#### Mobile app deployment

Google Play store MDM MAM Other

<sup>\*\*</sup>Government-specific cloud options

#### Reverse-out options

Phased withdrawal of access. Manual migration to new host required.

#### Languages supported

Over 50 languages supported. Detailed list.

#### Machine translation

Azure Cognitive Services provide translation options, but not directly for editors in SharePoint. Machine Translation services for SharePoint multilingual was retired in July 2022.

#### Right to left script

Yes

### Set-up and support

#### Set-up process for new clients

For small customers, online help is available in the <u>SharePoint help centre</u>, but everything is self-service. Medium to large customers tend to use <u>Microsoft Certified Partners</u>.

#### **Product updates**

Several per month

#### Product update process

Most are rolled out to Microsoft 365 tenants automatically. Microsoft gives advance warning and indicates impact level. Customers can choose to defer some high-impact changes, they can also elect to get changes early if they opt-in to the <u>'Targeted release'</u> scheme.

#### Technical support

Microsoft 365 admins can raise tickets for voice, email or chat support. First line support is generally good for single issues. Enterprise customers get all day every day telephone support from Microsoft, but may also buy <u>elevated support</u> options or outsource support to a Microsoft partner. Extensive Microsoft and third-party documentation are available, but it is often fragmented and rapidly goes out of date.

#### User community

Very strong, with SharePoint User Groups in hundreds of cities around the world. There are also many online forums for technical and business users.

Microsoft host the annual Ignite conference where SharePoint features prominently, and the online <u>TechCommunity</u>. They also provide extensive input to the annual SharePoint Conference in Las Vegas and the European SharePoint Conference (location varies).



#### In their own words

Microsoft bills SharePoint as: "Your mobile, intelligent intranet. Share and manage content, knowledge, and applications to empower teamwork, quickly find information, and seamlessly collaborate across the organization."

## Their view of the marketplace

In the 2021 Ignite Conference Microsoft's Jared Spataro (CVP, Modern Work) said: "The seismic shift to hybrid marks the biggest change to the way we work in a century. Emerging trends in the labor market have amplified the need for flexibility and a reimagining of how organizations can best position themselves and their people to communicate, collaborate and innovate."

#### Voice of the customer

People using SharePoint for their corporate intranet consistently praised the ease with which content can be added and the range of functionality. As one customer put it, "out of the box, SharePoint Online with Viva Connections, intranet managers can do a lot!" Another said, "ease of use, you can learn how to manage content easily even without coding knowledge". Customers also liked the frequency of product updates and felt assured by Microsoft's scale. One said, "it is very agile with continuous improvements coming up regularly. It has the ability for audience targeting and personalisation". As may be expected, the integration with the rest of the M365 suite was often cited as a highlight, and – unusually – one customer even praised the search. Notably, several customers spoke about "no additional cost", implying they saw a SharePoint-based intranet as cost-neutral compared to other options.

Regarding things to improve, a common thread was about the restrictions on design flexibility; "I feel that there are a lot of limitations with the platform. It would be nice to be able to be more creative with the design, the menu systems and the general look" and "make it easier for the non-technical person to create and manage themes. Make the themes more powerful so that they align better to my brand". We also enjoyed the observation that "the Views are still a bit stiff when you want to create your own personal touch to lists or document libraries, but, hey, it's still SharePoint, innit?"

News management was regularly raised as an improvement point too. "Other intranet platforms seem to have more sophisticated news management features" said one customer; "there are a few things that could be better in News, e.g. standard metadata across all news sites, metadata displayed on news item, comments that are sent to the mentioned author instead of the creator" expanded a second customer.

Analytics, ease of integrations for non-technical users and "general clunkiness" were also mentioned as downsides.

Feelings about a customer's relationship with Microsoft range widely, with some having a stronger direct relationship than others. One customer said, "fine. MSFT is an obviously huge company, and often you can feel this". Another agreed "it's OK. As Microsoft is a huge vendor, it can sometimes be difficult getting what you want out of them". And a third simply observed "Microsoft...Pff... we are on our own" but others felt that the ecosystem gave them what they needed "not much contact with the vendor, but enough external consultants who can assist in setting up the environment".











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Contoso

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Why simplicity matters

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Adele Vance yesterday



One million drones sold in 2018

Congratulations Contoso team! This September we set a new a..

Adele Vance yesterday



2019 sales leadership award

The sales leadership recognizes high performing technology sal. Adele Vance vesterday

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IR Handbook

Over Budget Areas

Contoso 2019 Medical Benefits

BI Improvement W

Audit of Small Business Sales August

Contoso Quad Customer Script

My recent sites

Mark8 Project Team

Retail Operations

The Perspective

Product support

Communications

Consumer Retail

#### Company events

NOV 28

Thanksgiving

In the design lab with Carlos Slattery 2

Company all-hands

3

Utilizing recycled materials in drone

Inclusion training

## **REVIEW**

### 1. User experience and visual appeal

score 3

From a user point of view, modern SharePoint is capable of some very attractive page designs that use images, space and highlights effectively. Layouts generally work well across a range of screen widths, and controls are consistent across the various elements of SharePoint. On first use, a neat feature is that a short series of pop-ups appear to give guidance.

When the intranet is embedded into the Teams desktop application via Viva Connections (see Scenario 9), the SharePoint element works in just the same way, but things become less predictable; controls appear in multiple places, some menu bars disappear, and some actions lead to a browser window opening rather than staying within the Teams app.

Navigation in Viva Connections is a particular pain-point for this embedded experience; whereas most SharePoint menus run horizontally, the Viva global menu is a fly-out from the left-hand toolbar. Unlike most mega menus, this cannot be browsed by a mouse-over and requires a series of clicks, similar to opening folders. It's a method that makes sense on a touch screen but is cumbersome on a desktop.

Navigation in SharePoint generally can be a challenge. Menus can be built for an individual site and also for a hub site. A hub site will aggregate sites associated with it and add a second menu bar layered over the first. Such stacked menus are rare on the web and could cause confusion. It is also disorientating to click on a news story and be taken into a hub site with totally different branding and menus. User-based targeting is also so-so.

There's limited ability to generate notifications in SharePoint. They do exist on the toolbar, but SharePoint and Viva still rely heavily on email notifications and setting them up will be too fiddly for your average user. Notifications can also appear on the 'dashboard' section and in MS Teams – we would rather see a more coherent approach.

SharePoint makes it easy to apply simple branding – a logo, on-brand theme colours and a banner image for a site. Changes beyond this get complicated, but many customers choose to simply accept these limitations. Consistency across a whole intranet cannot be readily imposed top-down without third-party governance tools.



## 2. Mobile and frontline support

SCORE 2+

SharePoint intranets can be accessed on mobile devices either through a browser, the SharePoint mobile app, or the Teams mobile app when Viva Connections is enabled. In all three options, we found navigating via menus just OK – it works well within a site but moving between sites or hubs is fiddly.

The browser-based experience for SharePoint generally works well: modern pages are responsive out of the box and web parts re-arrange to fit available

columns. However, they are not adaptive – you can't hide web parts when a small screen is detected, and some large web parts such as calendar views can be problematic. Microsoft has at least added a control to dictate where the vertical sidebar will appear on small screens.

The SharePoint and Teams mobile apps are clean and snappy to use, but neither feels like an 'intranet in your pocket'. SharePoint's app opens with a 'Find' tab and shows documents and a list of sites. A separate News icon shows a machine-curated list of news stories. Recently, Microsoft also added a 'Home' icon, that will take users to their SharePoint intranet home site. In most cases this will look similar to, but not the same, as the News tab, which we fear will create confusion.

The Teams app, when Viva is enabled, does show an icon for your intranet, but it opens onto a dashboard view (see Scenario 8) rather than news. Although it is arguable that the dashboard is a more practical tool, this isn't what internal communicators typically hope for, so it won't suit every organisation's vision for their intranet.

For frontline workers, there are no dedicated tools as such. However, Teams is marketed as a frontline solution, particularly as a mobile app, and it includes relevant tools such as Shifts (roster scheduling) and Planner (task management). In addition, Power Apps and Lists (see Scenarios 8 and 10) provide plenty of potential for frontline-friendly tools so we don't see this as a weakness.

Onboarding of frontline workers is more problematic, each user will almost certainly need an Exchange company email address, and Microsoft offer few options for enrolment compared to industry leaders. You can read a more in-depth account of the frontline and mobile experience in <u>our other report</u>.

## 3. Internal communication

SCORE 2.5

It is easy with SharePoint to create a news story page, and straightforward to add images, videos and even charts. Every news item is a fully-featured SharePoint page, making it easy to add rich functionality via web parts. The image picker is particularly handy, supporting libraries or corporate image assets as well as licensed stock image search.

Videos too are very capable – powered by Microsoft's Stream platform – they adapt well to the device and bandwidth in use, and the automatic captioning is invaluable. Whereas Stream used to feel somewhat decoupled (it was a stand-alone app on the Azure cloud service), it now hosts everything within SharePoint and feels much more tightly integrated. Videos can be played back within a SharePoint page, Teams or Yammer, and there is a new dedicated player app for iOS and Android. A current barrier for migration from classic Stream, however, is the lack of channels which many organisations used to collect videos around a theme.



The news web part will aggregate stories from other sites and can be filtered by metadata. However, Microsoft's model encourages news to be widely scattered, so internal comms teams may find it hard to deliver a well-curated news experience, particularly via the SharePoint or Viva app experiences (see Scenario 2). Many larger organisations want a model where news is pushed from a central source to multiple locations but this isn't natively supported. Microsoft's model is always that sites are set to 'pull' news based on search criteria. News can be rolled up from other sites and targeted to show only stories tagged with metadata topics. This is straightforward, but less powerful than matching those tags to the profile of the user. News can also be filtered so that it only appears for a particular audience, but these must be defined in Azure Active Directory, meaning that some internal communicators may be more dependent on IT admins than they would wish. Similarly, users cannot easily opt-in to news topics.

Central news management is missing out of the box, though Microsoft have announced Viva Amplify for early 2023 which they say "streamlines the communication process by centralizing it in a single hub".

Currently, news can be scheduled to publish on a pre-set date, but there is no site-wide way to plan or monitor this. A simple approvals process is built in though, and this works well. Promoting a story is a manual process of manually re-ordering news items, although there are news web parts that give a choice of layouts, so some stories are more prominent than others. The 'boost news' feature will also push a story to prime position on the hero web part, but only if the story lives in a designated "organization news site". There's no 'alert' feature or ability to push out a notification, although many companies get around this with a suitably styled web part.

News will also appear on the app, in a newsletter digest, and in the Viva Connections panel. However, in these interfaces, the order in which news is shown partly relies in putting faith in Microsoft's algorithm to show the right thing. Internal Communicators can boost a story to give it more prominence but can't directly control the news experience. One feature we do like though, is that if a user has read a story on the site, it won't be repeated in their newsletter digest.

## 4. Community and engagement

SCORE 2.5+

The social side of SharePoint is weaker than some rival platforms. SharePoint features comments and reactions on pages, and this works pleasantly enough but the overall experience is fragmented. For example, comments on news, Stream and Yammer all work separately. Governance for SharePoint comments also falls short, there is no ability to report a comment and no central analytics for comments. You can, however, add a 'highlighted news' web part that filters

by 'most commented' stories, and we like that the card for a news story headline shows the number of comments clearly.

Yammer provides a good option for expert communities or communities of practice. Its interface has improved greatly in the latest round of updates, with the ability to specify a post as a Discussion, Question, Praise or Poll giving it a more contemporary feel. Moderation is also much more mature than SharePoint's.

Yammer activity can be made more visible with SharePoint web parts that allow flexible embedding of groups, topics or even one person's posts. The integration into Teams as the <a href="Viva Engage">Viva Engage</a> app also makes it feel less like "one more place to go" than it used to be. The new 'storyline' feature will also be a very welcome addition to many organisations. Like Facebook and Instagram, it allows people to post updates to their profile rather than only within a group. We see the potential for leaders to share with a more personal, authentic voice, for example.



However, Yammer still has the air of a bolt-on rather than something fully interwoven into an intranet, and many companies struggle to differentiate Teams and Yammer as the place for social collaboration.

In addition to polls in Yammer, more sophisticated surveys can be created using Microsoft Forms. These embed well within a SharePoint page and can include a range of response types as well as images and video. A simple results overview is included and it is easy to export them into Excel. The main limitation of this approach is that there's no easy way to see trends over time without manually stitching the results of each survey together.

Microsoft's play for the 'Wellbeing' dimension is Viva Insights. For individuals this comes free with Microsoft 365 and encourages employees to book focus time, stay connected with employees and reflect. It even includes meditation and mindfulness exercises. For an additional fee, there's Workplace Analytics that gives managers an aggregate report on things like email overload, employee wellbeing self-reports and team meeting habits. This seems more valuable than the individual version if used with care and consent.

## 5. Information finding and knowledge management

3.5+

Microsoft Search powers the search experience across Microsoft 365. The ability to search across documents in collaboration spaces on Teams, as well as published content in a SharePoint intranet, is one of the primary reasons why some companies choose SharePoint over other intranet platforms. The reality nearly delivers on this promise, though there are some disconnects.

In SharePoint, the search interface is pleasant and helpful, it makes suggestions as you type and suggests spelling corrections in the results. Videos, images, and Office files all have a preview thumbnail, which is very useful for PowerPoint, for example. There are multiple ways to filter by search type and date, though we wish these would stand out more.

Management of search has moved out of SharePoint and into a sperate Microsoft Search console, which makes sense given its range, although the downside is that it gives intranet managers less scope to make hands-on improvements.

The search results page is configurable, albeit less readily than it used to be. Promoted results (now called 'bookmarks') are flexibly supported, along with the ability to define 'answers' as a text block on the results page (eliminating the need to follow a link). There are some impressive features too, such as the ability to drop in CAD files for searchable floor plans, define acronyms, and add a location address book.

Promoted results and 'answers' only work when the search scope is global and the scope concept is subtle, but has a big impact on results. For example, if you search within a hub then the results are scoped to only sites associated with this hub. This can be a good way to help users avoid being deluged with hits, but we worry that it's not always obvious what search scope is in use. The homepage of an intranet is likely to be designated the SharePoint 'home' site however, and this has a global search scope which feels intuitive.

Outside of SharePoint, the experience becomes fragmented at times. For example, Yammer results don't appear as a search result type, and in Viva Connections the user must manually change the search scope to 'intranet' in the search suggestions dialogue (we understand this will be addressed in an upcoming release).

We've always liked the ability to manage metadata and synonyms via the Term Store, and this gained a much friendlier interface in 2021. Overall, the administration tools are very powerful indeed when used with sufficient knowledge and resources to manage search proactively.

People search is good for individual results (a nice contact card and smart spelling correction)



but not for filtering a set of results and the org chart view is limited (Microsoft say a better Viva experience is coming).

For browsing knowledge bases, it's easy enough to set up a page or dedicated site, and a new 'accordion web part' allows for the compact presentation of information. The list capability (see Scenario 10) also offers potential with the right skills to configure.

Microsoft's strongest offering for knowledge management is its Viva Topics add-on. This makes Wikipedia-like entries visible as summary cards that are automatically hyperlinked when keywords and acronyms are detected – not just on pages but in Teams discussions, Yammer and Outlook emails too. However, the additional cost will be prohibitive for many organisations.

## 6. Admin experience and governance

SCORE 2.5

Administration for sites, and particularly for a whole intranet can soon feel very complex. Part of the challenge with SharePoint is that settings can be spread across multiple locations. Some can only be seen in 'classic' admin pages, others only in 'modern'. Many things that affect a SharePoint intranet are not in the SharePoint admin area at all, but in other elements of Microsoft 365.

For administrators of SharePoint pages, the experience is consistent and accessible; pages can be built using a wide range of drag-and-drop widgets, and dialogs for configuring each are clear and consistent. The interface for the text editor is now very rich, giving a good range of layout and formatting options. It is also easier to directly insert an image into text, crop and re-size it and so on. Templates can be set up to encourage (but not enforce) page consistency and you can even define templates for section layouts such as "one-third left image and text".

Templates for a whole site are much harder to create as they require programming skills; most companies rely on third-party tools to make it more manageable. Once templates are defined though, SharePoint offers a nice step-by-step wizard to apply a suitable template to a new site. Microsoft also supply some ready-made templates for scenarios such as help-desk and crisis comms. Any subsequent changes to the template do not get applied to existing sites though.

For governance, reporting will show usage against storage quotas, but it is much harder to find unused sites because they don't generate usage data. One feature we do like though, is a 'site performance' report, which clearly shows where elements on pages may be slowing things down.

By design, SharePoint reflects a low-governance philosophy by Microsoft, where anyone can create a site. This can be blocked, and a request process put in place for new sites, but there is no nuanced middle-ground. This can prove problematic for intranet managers; most organisations want to make it easy to create sites for MS Teams, but this creates a loophole where it is equally easy to create 'shadow intranets' away from the corporate one.

SharePoint makes it easy to create a multilingual experience, supporting around 50 languages for both the interface and for content. Where sites have language alternatives, users will see a drop-down menu of choices. Microsoft has implemented some good tools for managing this. For example, translators can be set up for each site and are notified when the source language version changes. However, there is no machine-translation option, it's a wholly manual process. As translations happen at the page-level, monitoring untranslated sections in a site will be tricky. On the front end, machine translation exists for posts on Yammer, but not comments on SharePoint pages.



## 7. Analytics

SCORE 2+

Every page on a SharePoint intranet has its own simple analytics panel visible to the site admin, showing views, time spent, and most active times. We applaud the ease of access for this implementation. Unfortunately, things do get a bit more complicated after this.

SharePoint will generate usage reports for individual sites, showing unique viewers, site visits, popular posts, and documents. To see more, admins must look into Microsoft 365 and Azure reports. These are OK as far as it goes, but most of what is shown is about license usage. Intranet owners, particularly Internal Comms people, often are more interested to learn "did my article engage people?", and there are no views to address this. Nor is it possible to create audits of article views for a 'mandatory read' facility, though Forms and PowerBI reports could be used as an ad-hoc workaround.

Moreover, building up a picture of what is happening becomes very fragmented, especially if you consider your intranet to be a combination of SharePoint, Yammer, Stream and Teams. It is possible to extract all the data into Power BI and there is a 'Microsoft 365 usage analytics' report to start you off. This requires Power BI Pro licensing at additional cost, and we expect most organisations would need to substantially customise the report to give insights on content performance.

Search analytics cover the essentials well – there are reports on top searches, failure to find and abandons. A helpful addition is the inclusion of a feedback form on the search results page, and responses are aggregated into the Microsoft Search admin panel.

## 8. Digital workplace integrations

2.5+

Microsoft used to be good at integrating components within their own platforms, but not so good at integrations with external systems. This is now changing, and there are several ways to connect business systems across Office 365, though not all routes are well developed. Due to the widespread availability of APIs for most major platforms, companies committing to SharePoint as an intranet will rarely find themselves at a dead-end for

integration options, although it may take more work than it first appears, and organisations may need to develop governance around integration to ensure consistency.

Multiple vendors such as Salesforce, ServiceNow, Workday, UKG (Kronos) and Talentsoft have connectors that will work with the Viva Connections dashboard feature, and this offers the most direct integration with SharePoint. Some of these are presented as fairly simple read-outs on a tile, such as an approaching holiday, while others support a full transaction process within a card, effectively meaning that the employee doesn't need to leave the intranet. This is a concept we have been advocating for many years and a very welcome development, though we are yet to be convinced that the dashboard feature is the best way to deliver it. In particular, there are very few options for how the dashboard is organised and presented.

A second route is to use Power Apps, which can be embedded on a SharePoint page and made to work well on mobile too. This is an enormously versatile facility, giving a high



level of functionality without requiring significant coding skill. Power Apps can be delivered on SharePoint pages, in Teams, as Dashboard Cards and on mobile. There are several hundred connectors that support data exchange with other services, such as Box, Google Drive, Oracle, Stripe and Zendesk. However, many are not fully developed (previews), and common enterprise-grade tools such as ADP are missing.

The third possibility is the Teams app store. This is certainly extensive, and for SMEs may usefully plug a gap. However, Teams is a challenging way to navigate across many apps so this route risks exacerbating a common problem that intranets try to solve: "what tools do we have and where are they?"

Finally, there is the full-development route using APIs and SharePoint Framework (SPFx). This is a mature and flexible option that overcomes many problems of the past, where customisations were often at the mercy of Microsoft's changes, but of course there is little out of the box to start you off.

Federated search is supported via Microsoft Graph connectors. These usually enable Microsoft Search to index a third-party source and present the results as a separate block from a SharePoint search. Microsoft options include Salesforce, ServiceNow, Oracle SQL and MediaWiki, but there are numerous other connectors from BA Insight, Accenture and Raytion available at extra cost.

## 9. Microsoft 365 integration

score 4.5+

For many companies, integration with other parts of Microsoft 365 is a compelling reason to use SharePoint for an intranet, so you'd expect this scenario to be a straight flush. However, the story is not so straightforward.

Integration between an intranet and MS teams is often high on the wish list for internal communicators. Viva Connections does a reasonable job of embedding SharePoint into a Teams app, but parts of the interface are

clunky (see Scenario 1) and ultimately Teams is doing little more than acting as a browser. Nor can you push a story into a Teams channel as other platforms can (though you can promote into Yammer). Several other products in this report do a better job.

Similarly, we'd like to see the same curation of "my collaboration spaces" found in other intranets. SharePoint will show you a list of traditional 'team sites' but that doesn't help a user who can't remember if "Task force X" was in MS Teams, a SharePoint team site or a Yammer community.

Search is also a little too fragmented, with Teams and SharePoint search behaving in subtly different ways (improvements are on the roadmap), see Scenario 5. However, Microsoft 365 does do a very good job with page, document and video (using modern Stream) search because they all live in SharePoint, even if they appear to the user in Teams, SharePoint, or Yammer. People profiles are also good now – the same 'Delve' profile can be seen across all applications (including Word and Excel too). Similarly, the OneDrive application gives a very versatile entry point that combines personal files, ad-hoc sharing and more structured collaboration storage within Teams and SharePoint sites.

It is this continuity between collaborative content and the published intranet where sticking to the Microsoft route excels. It is a very versatile tool at the level of departments and team use of an intranet (rather than the corporate level). For example, it is very easy to combine collaborative elements such as inserting a document library, highlighting documents based on metadata, showing recent and popular documents, creating a Power



BI chart, or adding a Planner board to a page. At Ignite 2022, Microsoft also announced the ability to view and edit Power BI reports without the need to download the desktop version, which we expect will be a valuable addition to making live data more widely accessible to decision-makers.

### 10. Wildcard

3.5+

Our wildcard scenario is meant to highlight something notable that doesn't fall within our defined scenarios. For SharePoint we've picked Microsoft Lists. This may seem mundane, but they've been a fundamental feature of how SharePoint works since its inception, and their recent promotion to a brand in their own right within Microsoft 365 has given them a retro-cool.

Typical use-cases for Lists include inventories, event planning, to-do lists, new employee onboarding checklists, team contact directories, recruitment workflow, incident reporting, and visitor registration, but their flexibility means many more things are possible.

Think of Lists as being something you'd do as a table in an Excel sheet, but one that lives on the cloud and doesn't require you to launch an application first. Then imagine that you can show that sheet in multiple ways to fit the data and have any number of users update it at the same time. So, your list of dates may be a calendar, a list of people may be an address book, a list of tasks may look like a plan and so on.

Extra utility for Lists comes from the Android and iOS apps, which make it easy to fill-in Lists away from the desk. These are ideal for things like inspections and small-scale inventory control, particularly as phone cameras can be used to add images or document scans to an entry. A recent improvement for frontline users is support for offline Lists too.

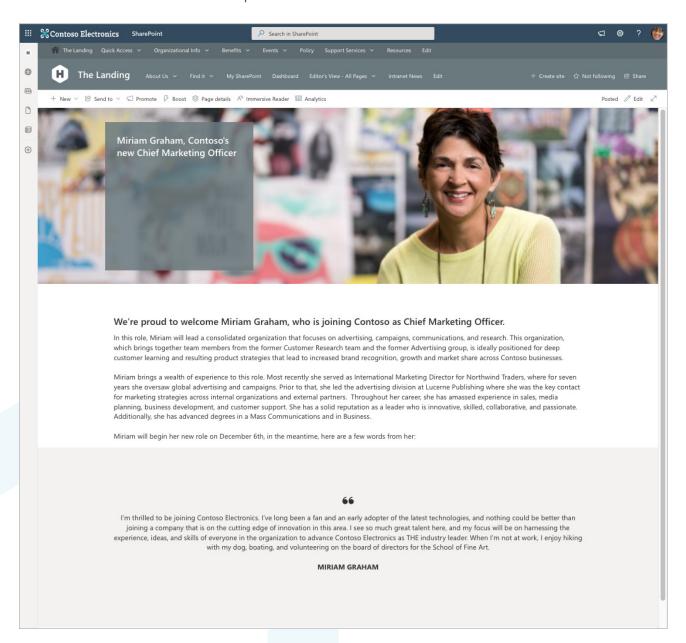
The final trick up List's sleeve is that items can be automated. The simple version just generates an email based on a rule such as a row or column change. However, with Power Automate much more complex flows are possible, such as requesting manager approval, creating a planner task, or even exporting to third-party environments such as Google Sheets or a Twitter tweet. The options are expansive, but it does come with some challenges, such processes quickly become hard to debug and govern, and large-scale use incurs extra costs. In other words, Lists are fantastic for small-scale fixes, but don't run your business with them.



# **PRODUCT HIGHLIGHTS**

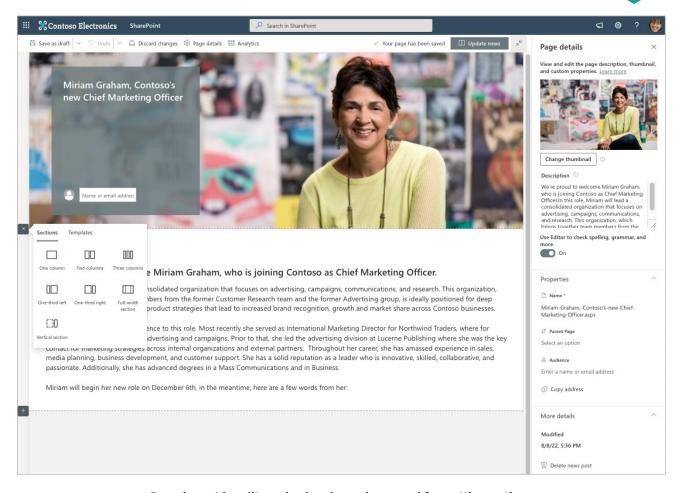
## Attractive news and page creation

The ability to create news and site pages within SharePoint has improved greatly with the modern UX. Microsoft continue to expand on layout options, both at the page and web part level. For example, pages can be divided into one, two or three columns in a section, and each section can have a different set-up.



Page layouts are versatile, enabling modern, appealing designs.



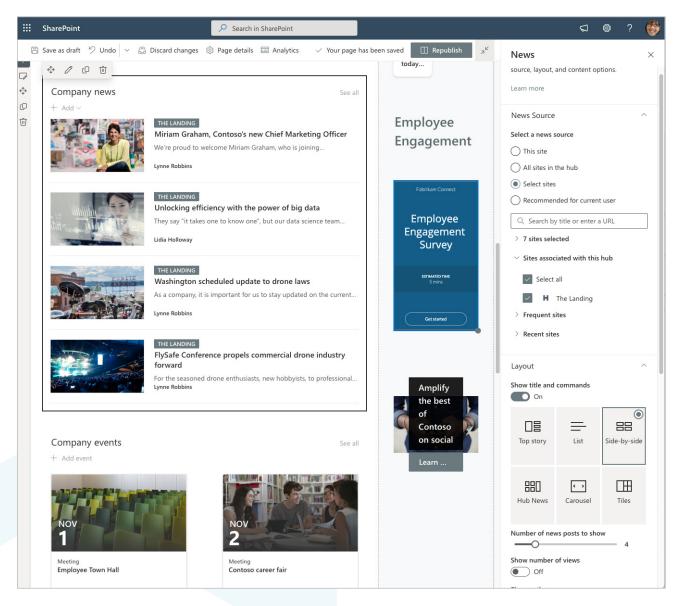


Page layout in edit mode showing column and formatting options.



Web parts for news are versatile. There is a good selection of news layouts that meet most needs from a simple list through to a hero image and thumbnails. As each news article works like a regular SharePoint page, there is plenty of scope for rich content too, with the ability to insert charts, videos and even saved searches into a story.

The source for news can be set to the site where the web part belongs, sites associated with a hub site, or a custom-picked set of sites. This makes it easy to create an overview of what is happening across an intranet or just a specific part of the organisation, for example, all departments in one country.

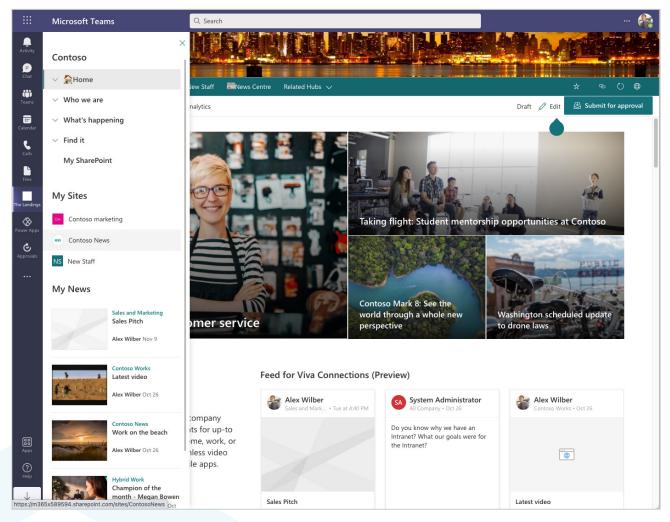


News web parts can aggregate news from other sites, such as all those associated with a hub site.



## **Viva Connections**

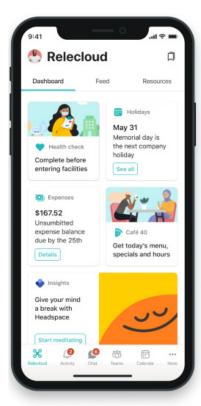
Viva Connections adds the ability to turn a SharePoint intranet into an app for Teams, as well as extending SharePoint's own functionality with new web parts. If the intranet has its own name and logo then this appears on the app. Clicking on the app button in Teams a second time reveals the global navigation as a vertical menu, along with a list of 'My Sites' (based on user favourites) and 'My News' (an automatically curated list of news from the sites the user has access to as well as Yammer posts and Stream videos).

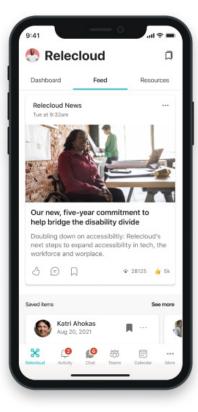


An intranet in Microsoft Teams using Viva Connections. The intranet name ('The Landing' in this example) appears on the Teams toolbar.



The other interesting angle to Viva Connections is the 'dashboard' component. The idea is that each tile is an entry-point to common tasks. Some may just be quick links, but the most useful are active cards showing a status readout, for example expenses submitted that month. Clicking on the tile brings up a card for interaction, such as an expenses approval or a calendar to book leave. Notably, these aren't just for Microsoft 365 applications as they can also integrate with common employee cloud services such as Workday, ServiceNow and Qualtrics.

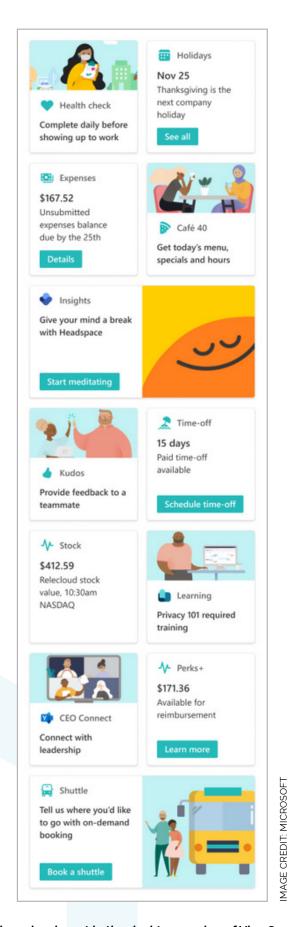






MAGE CREDIT: MICROSOFT

Your intranet appears on the MS Teams app with its own icon and name. The default screen is the dashboard view, with 'Feed' showing news stories.



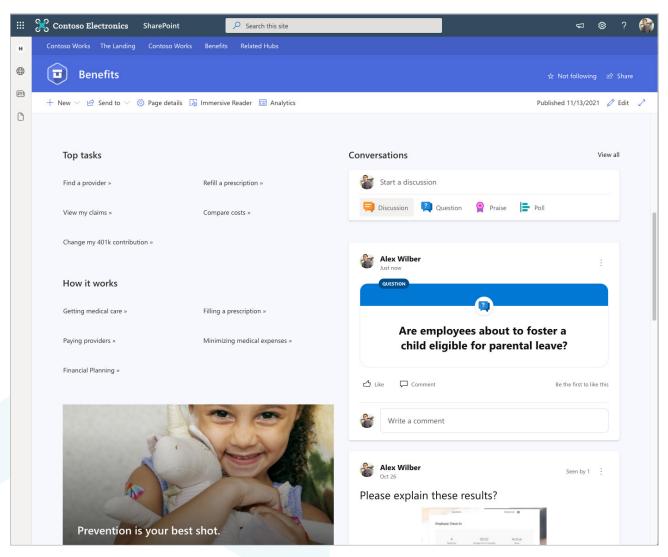
The Dashboard web part in the desktop version of Viva Connections.



## Yammer can be embedded into SharePoint pages

SharePoint offers two ways of embedding Yammer into pages, 'Yammer Highlights' and 'Yammer Conversations'. The Highlights version is more compact, but only runs horizontally and is non-interactive. The Conversations web part can be flexibly configured to show a single group, personal feed, topic or even the posts of one user (e.g., for a CEO blog). It's a useful way to add a 'helpdesk' style chat alongside reference material, for example in an HR page on employee benefits.

Yammer has had a makeover, and now blends in much more with the styling of SharePoint. It supports modern social features such as giving praise, ad-hoc polls, and a range of possible reactions rather than just 'likes'.



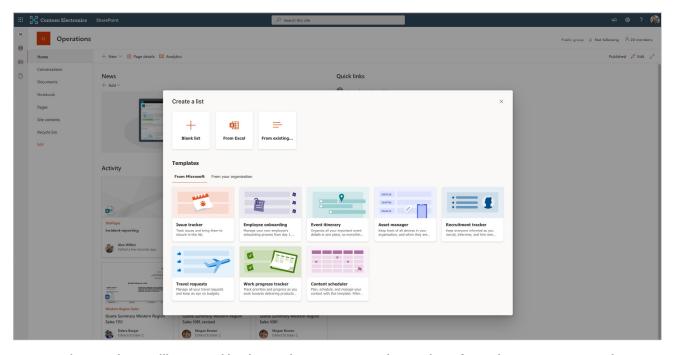
The Yammer conversations web part embeds a discussion on a SharePoint page and enables sharing, replies, and likes without going into the Yammer interface.



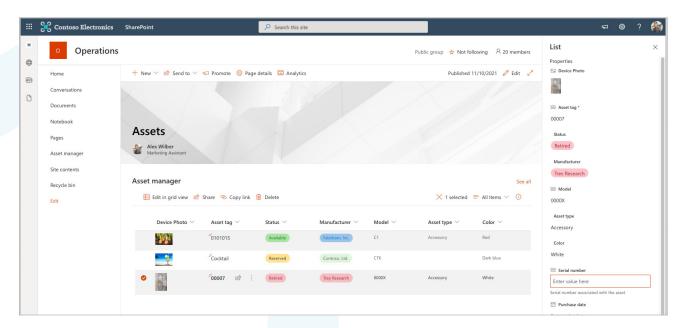
## Lists are a versatile tool in their own right

Microsoft Lists is a highly versatile tool that fills a gap for ad-hoc data collation when it's not worth building a full app, but something is needed with more structure than the usual Office tools or replying to an email. What elevates Lists from a simple 'to do' is that columns can be styled in very versatile ways, for example tags can appear as colour-coded labels, people names include photos and a link to profiles, images appear as useful thumbnails etc.

Lists can be created in SharePoint, Teams or from the Lists app directly (both desktop and mobile). There are some useful templates to begin with, and it is easy to re-use a list from elsewhere too.



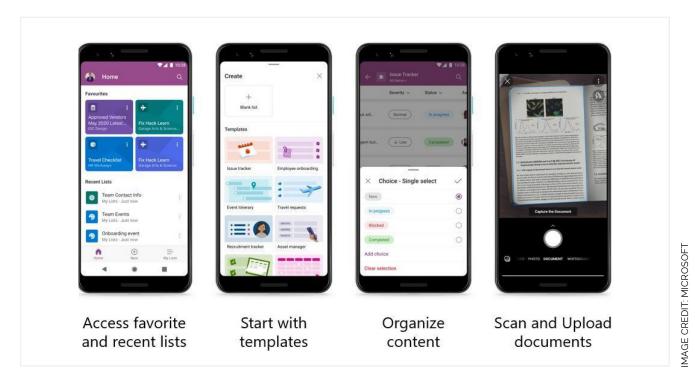
Lists can be readily created in SharePoint or Teams, and a number of templates are suggested.



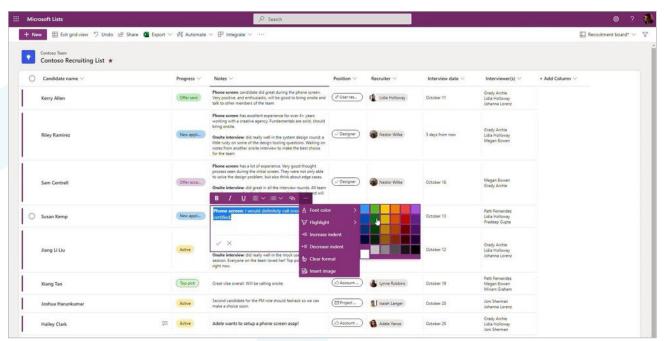
Lists can be embedded on a SharePoint page or accessed from a mobile app.



Lists can then be published as read-only or for team members to edit, and triggers can be set to notify an approver when entries are added. Much more complex workflows are also possible with the optional Power Apps integration. The main win for Lists in our view is that they have gone from a fairly dull, utilitarian feature of SharePoint to something that is attractive, user-friendly and easy to configure.



Lists can be accessed directly from the mobile app, without the need to go via SharePoint or Teams.



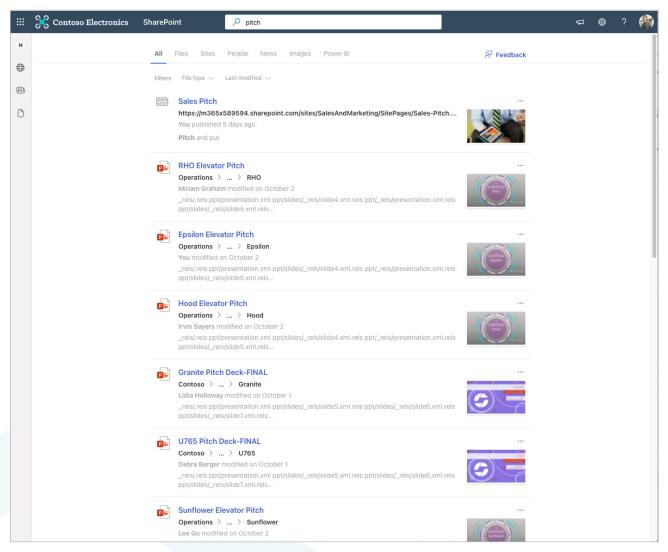
It is easy to edit lists as a table, including styling of text.



## Search and metadata

Search directly within SharePoint (we don't consider search in Teams or Viva a 'highlight' yet!) leads to a well-structured set of results. Tabs can then be used to refine results by Files, Sites, People, News, and Images. There are also filters to pick a specific file type such as Excel or PDF, and by date range.

Sources for search results include SharePoint news, files and sites, OneDrive, Stream (video) and Delve (people directory). Connectors are also available that will show results from third-party sources too, such as Oracle or Salesforce.



Search results are clearly presented with thumbnails for each file and page.

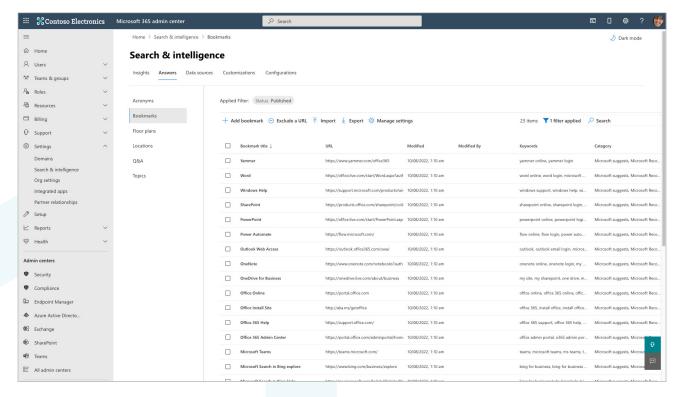


To make content findable, administrators have powerful tools to set up consistent metadata across an intranet, defining multiple languages and synonyms for each metadata entry. A recent addition is that metadata can be managed at the site level as well as centrally, allowing for local definitions rather than a definitive central one. We don't envisage this being widely used, but it could be valuable for SharePoint team sites that are used as knowledge bases to manage a large set of documents, for example.

In addition, there are specific search categories that can be centrally managed under the 'Answers' tab:

- · Acronyms common abbreviations in your organisation
- Bookmarks detect keywords and put the 'best bet' location as the first result, for example a link to the HR application when people search for "Leave"
- Floor plans upload AutoCAD DWG plans with room labels; these can then be assigned to people profiles, rooms, and equipment to be part of the search result
- · Location like floor plans, these show building locations on profiles
- Q&A show a short textual answer directly in the results rather than making the user click on a link.

The Q&A seems a particularly handy feature that we don't see used widely yet. It could be applied when you detect search terms that just need a quick, simple answer such as "shuttle bus timetable" or "Wi-Fi guest password". Answers can be specific for groups or locations, and even tailored per device (for example to give a different answer for setting up email if the user is on iOS or Android).



Search admins can assist some search types by defining acronyms, bookmarks, floor plans and Q&A.



# THINGS TO BEAR IN MIND

Although SharePoint and Viva Connections have many strengths, there are also some gaps from an intranet point of view. Often the starting assumption is that if you already have Microsoft 365, then SharePoint is 'free'. However, SharePoint is not a ready-to-run intranet, it is a platform on which an intranet can be configured and there will be costs involved. Before defaulting to using SharePoint, companies need to carefully consider their objectives and the costs, not just of setting up but of running the intranet well over many years. In some cases, other products in this report will be easier to live with in the long term.

Even medium-size enterprises can get into trouble because the first steps are easy, but the scaling up is not. A single intranet with a few sites is simple enough, but creating a manageable navigation over more than one hub site remains problematic, even with the new home site and global 'app bar' or Viva Connections. The global menu approach is unintuitive, and the combination of site-level and hub-level menus is confusing. This fragmented approach also extends to news, as there is no easy way to create a central news repository.

Analytics are found in several places in SharePoint and Azure, but they will appeal more to IT than intranet managers. Many companies end up buying a dedicated tool or must create custom Power BI dashboards to compensate for this. Governance analytics to detect old content and dead sites may need yet another third-party tool for a complete picture. Additionally, social features are acceptable if Yammer is deployed, but still fall short of competition outside the Microsoft world, where user activity across comments, likes, discussions and profiles are well integrated and not just part of a social networking component.

The most powerful appeal of a SharePoint + Viva Connections intranet is everything being integrated into Microsoft 365. In the past when intranets had a strong collaboration role to fulfil this was indeed very important. Now that Teams is the de-facto entry point for collaboration however, the significance of this for an intranet platform is less than it used to be. Just about any intranet in this report will surface documents from SharePoint for things like a policy library. Nor do we consider Viva Connections a game-changer. Having an intranet in Teams is handy, but it is really just using Teams as a browser. There is little to make the user click on the intranet icon when they are focused on activity in meetings, channels, and chats. Other products even do a better job of this aspect.

The ubiquity of SharePoint means that there are many web parts available on <u>GitHub</u> which address some of the shortfalls identified in this review. These are free but unsupported. Many small-medium enterprises may feel they do not wish to go down this route, but larger customers with in-house IT skills may well find this a viable route to getting a SharePoint intranet to deliver the desired functionality.

When it comes down to it, the main advantage of staying within the Microsoft 365 world is the integration of search and profiles, plus the range of features and ease of use of SharePoint if your site needs are straightforward. These are important concerns, but not the only things to consider, and SharePoint isn't the only way to address them.

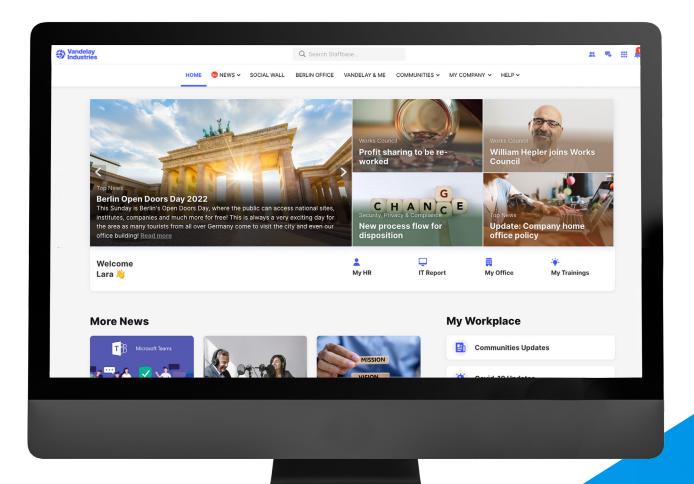


## Why choose this product

Modern SharePoint has evolved significantly and is capable of some attractive and very versatile intranets. It works best when an organisation has a very federated mindset to intranet governance, preferring there to be a very large number of loosely coupled sites rather than a top-down and highly structured architecture. Ultimately, SharePoint is also best considered an intranet and content platform within a much broader digital workplace offering that includes MS Teams, Lists, Power Apps, Stream and Viva. When viewed from this perspective, the comprehensiveness of what is on offer can often override reservations about SharePoint from a pure intranet point of view.



# **Staffbase**



# Our view in one tweet

Staffbase can be your comms platform, intranet, employee app solution, or all of these things, with its excellent fully featured and contemporary approach.



Staffbase Front Door Intranet (hereafter referred to as Staffbase Intranet) was released in 2019 in Germany, where it started as a mobile solution aimed at frontline teams. Since then, its purpose has evolved to encompass broader internal communication needs, although its origins are still clear to see – its mobile solution is excellent. In recent years Staffbase has acquired additional internal communication software vendors, furthering its growth, and in 2022 was valued at over \$1 billion.

As a result of the expanded capabilities, internal communicators will find a lot to like among the Staffbase Intranet functionality from content creation to excellent analytics. The experience is highly targetable, meaning that both the desktop and mobile environments present a personalised experience to the end user that's under the

control of admins. The overall user experience is excellent and there are some good M<sub>3</sub>6<sub>5</sub> integrations, which is unusual for an independent intranet solution.

Out-of-the-box integrations with other business systems are lighter, but there is the option to develop these with APIs. The search is one of the weaker areas, particularly on mobile, where the user experience and management options could be improved. Additional content lifecycle tools and additional engagement features (such as ideation) would also be welcome.

Overall, Staffbase Intranet would suit large or complex organisations that wish to address communication and / or frontline worker needs, both of which it does well. It's worth noting that it is in a higher price bracket than other products, but there are optional modules included in the pricing that could be removed if not required.

## Summary table of scenario scores

## NO. SCENARIO/SCORE 1 User experience and visual appeal Mobile and frontline support 2 Internal communication 3 Community and engagement 4 Information finding and knowledge management 6 Admin experience and governance Analytics 7 Digital workplace integrations 8 Microsoft 365 integration 10 Wildcard

## **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and nonprofit organisations, schools and educational institutes, government / public sector, healthcare, frontline users, multi-year commitments, businesses over 20,000 users. Price includes: Training for admins, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, hosting, onboarding user data, access to a community & webinars, project team trainings; additional customer support is part of a premium package and are available for UI/UX design, strategic advice, and tech; onboarding project managers support all new customers in platform provision process.

## Key benefits

- Staffbase Intranet is simple yet contemporary and delivers a good user experience.
- There are excellent tools for communicators, from creation and news management to measurement.
- Frontline and other mobile user needs are very well met, through effective targeting.
- Analytics are among the best we've seen across any platform.
- Integrations with the M365 suite work very well.

## Improvements and considerations

- The search experience (particularly on mobile) and search management tools have room for improvement.
- Moderation of social posts, particularly for other users to report content, would be welcome (as it exists for comments).
- Engagement features, such as kudos or gamification, would be a nice addition.
- Integrations with business systems are lacking out-of-the-box, but there is the facility to build using APIs.



## **Product type**



## **Branding opportunities**

All branding, complex options

## Target businesses



**SMALL** less than 1,000 people



MEDIUM 1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

## Base systems









Fully standalone

Requires SharePoint Optionally works with SharePoint

Other

## **Sectors**











Engineering and manufacturing

Healthcare

Retail

**Transport & Logistics** 

Accountancy, banking and finance

You may also be interested in...









# **COMPANY AND PRODUCT**

## Company details



#### Company Staffbase



## Company founded

2014



#### Company locations

Chemnitz, Germany (HQ), Germany, UK, the Netherlands, USA, Canada



### ISO 27001 certified

Yes



## Typical client size

1,000-50,000 employees



# Largest deployment so far

550,000 employees in 220 countries



#### Partner locations

Australia, Austria, Denmark, France, Germany, the Netherlands, Spain, Switzerland, UK, USA



#### Customers

Clients include: 3M, Aldi US, Swire Coca-Cola, Mister Car Wash, Great Clips, Geberit, Heraeus, Deutsche Post DHL Group, Viessmann

## Product and technical details

Name of product	Staffbase Front Door Intranet		
Product launched	2019		
Current version	5.0 - August 2022		
Accessibility	Alt text is in use for images, keyboards can be used for navigation.		



Other

#### Deployment

Client onpremises Client private Microsoft Amazon Web Services Vendorhosted Microsoft Services Amazon Web

#### Data residency

Germany, USA

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active Directory	ADFS	Open ID	Oauth	G Suite	Other*
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<sup>\*</sup>OpenID Connect, Okta, SAP, Gygia, Shibboleth, APM, invitation via known email, email self-sign-up, invitation via access code, and hybrid options.

#### Search technology

Apache Lucene/ Solr Apache Lucene/ Microsoft Vendor's own Other

## Document library sources integrated

Box Dropbox Google Drive SharePoint OneDrive Other

## SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Connections

## Mobile app deployment

Google Play store MDM MAM Other\*

<sup>\*</sup>Client's website, Android App Stores in China



#### Reverse-out options

Upon expiration of the subscription term or termination of the contract, Staffbase deletes and / or returns all personal data processed under the data processing agreement. Personal data will only be retained where the law requires.

#### Languages supported

English, German, Bulgarian, Chinese (simplified and traditional), Croatian, Czech, Danish, Dutch, Estonian, Finnish, French, Greek, Hungarian, Italian, Japanese, Korean, Latvian, Lithuanian, Norwegian, Polish, Portuguese (Brazilian and European), Romanian, Russian, Serbian, Slovak, Slovenian, Spanish, Swedish, Thai, Turkish, Ukrainian, Urdu, Vietnamese. Please see their website for more information.

#### Machine translation

Yes - via the product

#### Right to left script

Yes

## Set-up and support

#### Set-up process for new clients

Clients are onboarded and supported by an onboarding project manager from Staffbase. They help clients set up the platform and guide them through topics like platform layout, user management, admin training, information architecture (user groups, content, navigation, personalisation), use cases, and content strategy for high adoption. They also offer expertise on launch planning. On average, customers spend 2-4 months building out some initial content before launching.

## **Product updates**

An updated version of the web app is rolled out to customers every week. An updated version of the native mobile app is rolled out once per quarter. New features are usually bundled into the quarterly native app release and communicated accordingly.

## Product update process

Web app updates are rolled out to all customers automatically every week and contain mostly technical improvements. The quarterly release contains more new features and functionality, some of which are rolled out automatically, and others of which can be activated upon request. All updates are documented in the support portal and can be discussed with customer care agents.

## Technical support

Technical support is available via phone, email, or ticket system, with an average response time under one hour. Support is available 12 hours per day, 5 days per week, although critical tickets can be raised all day every day. The support teams are located in Europe and North America, so customers in both regions can receive convenient help in their time zone.

## User community

Staffbase has a highly active user community. Staffbase offers regular onsite and virtual customer events that give community members the opportunity to share best practices and knowledge. Some events are sector-specific for more detailed exchange. Each year Staffbase hosts a large internal communications conference called VOICES, where industry professionals, customers, and internal comms experts gather to discuss trend topics, exchange ideas and network. In addition, customers have access to a platform for submitting ideas for new product features and sharing and discussing use cases.



## In their own words

Staffbase says: "The Staffbase Front Door Intranet is one place for communication, information and interaction for all employees, whether they're at a desk or on the frontline. Employees get centralized access to news and services in a modern, mobile-first interface, with relevance ensured through targeting and personalization. Admins can easily manage it all with no code, alongside other channels like email or digital signage."

## Their view of the marketplace

Staffbase says: "Today, many companies are at a crossroads with their legacy intranet – they struggle to reach all their employees in an engaging and relevant way, and find their existing system cumbersome and hard to manage. Companies that choose Staffbase are looking for a modern way to bring together relevant communication and interaction for all employees, in one system that is simple to manage for company communicators."

## Voice of the customer

Almost everyone who completed our survey mentioned the ease of use as one of the benefits of Staffbase Intranet, with one summarising nicely by saying "the clear structure and the simple operation" was best about the product. "Technical reliability" doesn't come up much with customer feedback, but this is something Staffbase was praised for. People also particularly like the personalisation with one person commenting, "we are able to provide highly personalized information to our 600k employees". Another added that the personalisation and adaptability of Staffbase Intranet is possible with "hardly any internal IT resources required". Finally, one customer summarised well by saying, "Staffbase, as a company, understands the needs of the communications department and the product is designed around that".

Suggestions for improvements were few and varied per response where we received any at all. One person asked for "improved chat [and] stronger rights and role concept for enabling local champions", while another wanted to see "transparency of the structure of an intranet". The podcast was an area one person would like to see improved, plus "better administration in the backend".

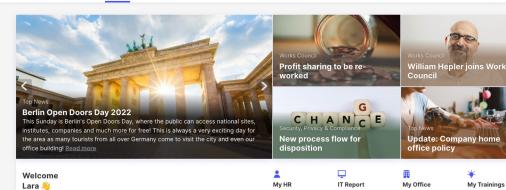
Feedback about working with the vendor was wholly positive, with one person praising "good and competent staff and support. Help with ideas is always there". Another customer said they "reliably take care of the needs of the customers" and praised the process of gathering "pain points" to develop the platform. Finally, one customer praised them highly by saying, "working with Staffbase is the closest and most pleasant working relationship I have ever had with a vendor".







HOME TO NEWS V SOCIAL WALL BERLIN OFFICE VANDELAY & ME COMMUNITIES V MY COMPANY V HELP V



#### **More News**



**Microsoft Teams** Trainings are now available!



AMA Podcast 4: CSO on setting goals and great ramen



Snapshot: Company Values contest now open



How can YOU assist with Job Hazard Analysis?



New strategic climate initiative



New employee referral program March 25 at 1:30 pm



My Bookmarks

**My Workplace** 

#### **Announcements**

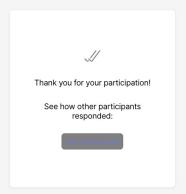
▲ IT-Updates: We have improved the performance to resolve the issue and notifications are working again. No data loss occurred, notifications have been sent out delayed.

#### **New Yoga classes**





#### **Employee Survey**



#### **Social Wall**





Like ☐ Comment

## **REVIEW**

## 1. User experience and visual appeal



score 4.5

Staffbase Intranet has relatively simple controls that allow admins to create an intranet with news, community spaces, and reference areas, with an impressive degree of flexibility. The result is an attractive and effective experience that is consistent across the desktop environment as well as on mobile (see Scenario 2). The interface too is simple yet provides a contemporary experience for end-users

Site navigation is clear and helpful, provided through a persistent mega menu at the top of pages, which can be single or multi-level and audience targeted. Images and text can be added to menus, to provide an explanation of what someone will find there, for example. Pages include breadcrumb trails and widgets can be added for sub-navigation if wanted, which is a different approach to a traditional intranet but handled well. There is also a configurable footer to aid navigation, plus user-specific menu items such as chat, notifications, an app launcher, and personal settings in the top bar.

Notifications on desktop are accessed via a bell icon and aggregate activity from across the intranet, excluding chat that's handled by its own menu. It's easy to see which notifications are new, but unfortunately people can't mark something as unread to return later. People can bookmark pages to return to later though, which provides a simple workaround for content notifications.

There are some flexible branding options in Staffbase Intranet, which includes fonts, background images and icons. These can apply to every user's environment, or complex branding with parent and child approaches can be respected by tailoring page designs and branding to user profiles. While flexible it can sometimes feel like there is too much white space or space between widgets, particularly on the home page, which can make it seem simple when compared to other products in this report. Overall, however, Staffbase Intranet looks attractive and provides an excellent experience for end users.

## 2. Mobile and frontline support



4.5

Staffbase Intranet has its origins in the employee mobile app market and a mobile-first mindset is clear to see throughout the product. Overall, the mobile user experience is excellent, only let down by the search experience that would benefit from additional filters and sorting (which is on their roadmap). The smooth desktop experience is continued on mobile, where admins choose what menus, pages and widgets are accessible via small screen devices and to a

mobile audience, meaning a frontline workforce sees content and an app that's tailored to them. Encouraging a frontline workforce to download a business app to their personal device can



be a challenge, but Staffbase Intranet addresses this well. Firstly, the app is white labelled as standard, so it immediately feels like an organisation's tool rather than an unknown app. The user database can be synched from Active Directory or an HR system, where a helpful configuration option allows for a variety of personal fields to act as a unique identifier to grant access, such as a birthday, name, or payroll number. The app recognises whether there is a passcode set on someone's phone and will force log ins every time if not, but will also recognise biometrics to grant easy access.

There is a chat feature that works well on mobile and provides a simple alternative to WhatsApp or MS Teams, although interactions are limited when compared with the social features found elsewhere. Staffbase Intranet supports the sharing of podcasts, which are often listened to on mobile rather than desktop. There aren't any other dedicated frontline features, but everything present on desktop is also available via the app (where wanted) and has been designed well to work on a smaller screen.

## 3. Internal communication



score 4.5

some really attractive results.

There are a lot of features that Internal Communicators will appreciate and the efforts Staffbase have put into developing an excellent communication tool are clear to see. Please see the Highlights for much of the detail. All pages are created using the same editing tool, where publishers may start with a preconfigured template or from scratch. Text is edited using a rich text editor, while the more dynamic aspects of a page are added via widgets to create

News is published to channels or community spaces (see Scenario 4), although targeting is by user groups. It's possible to inherit pre-built user groups from systems such as Active Directory, or to create in the back end of Staffbase. Creating audiences on-the-fly is on the roadmap however, which we think will be a helpful addition.

There is an excellent calendar to help publishers manage the flow of news, including a 'blocker' to stop people posting on busy days. This is helpful as people can filter on articles they have permission to edit as well as being able to see an overview of everything. News articles can be associated with a 'campaign' topic that gathers together all content types for ease of administration and also for analytics (see Scenario 7). We think it would be helpful to add fields for a timeframe of when the campaign is active, and an option to archive once it's no longer running.

For crisis communications, publishers can 'highlight' an article on the home page to increase its visibility in widgets. Push notifications on mobile and email are part of news creation, which help with reach, and can be automatically or manually re-sent, useful where someone doesn't 'acknowledge' reading an article.

Where wanted, publishers can choose to create a dedicated mailshot using the excellent Staffbase Email tool (see Scenario 10). Other than email inboxes and mobile, publishers are able to reach people in M365 tools (see Scenario 9) and in person via a simple digital signage solution. In mid-2022 Staffbase acquired dirico, which they are working to integrate more closely to provide advocacy functionality. Please see Scenario 10 for more on reaching people outside of Staffbase Intranet.



## 4. Community and engagement

3.5+

The communication and frontline focus means that community and engagement needs are well met. Much of Staffbase Intranet's structure revolves around community spaces, which include social features such as an activity feed for user posting where wanted, or the chat may also be used for social interactions too. The creation of communities is centrally managed and a form can be created for people to request new spaces; although no workflow for

community creation exists, Staffbase can create one using Power Automate on request.

The process of adding a post will be familiar to anyone who uses social media and features such as GIFs or uploading media are supported. There is no way to report a post, although comments can be reported for moderation where admins hide and remove comments as needed. There is a good range of reactions available, which aren't customisable but are mapped against sentiment analysis in the back-end.

Publishers are able to add surveys and polls to pages; these are very simple so we think it's a shame users can't add them to posts too. There aren't any dedicated employee recognition or wellbeing features, Staffbase say a 'thank you' or 'wellbeing' community could be set up for these purposes. There aren't any gamification features either, which might be a nice addition to such an engaging tool.

'Journeys' provide admins with a tool to build content paths, where content is released to users once they reach a certain condition and is personalised to their role, department, country etc. The included steps are entirely under the control of admins, so could be associated with exploring Staffbase Intranet to get up to speed with it, finding out about the company, or practical tasks to onboard them (such as completing HR forms).

## 5. Information finding and knowledge management

SCORE 3

There is a prevalent search bar that provides a nice experience by presenting 'top results' as someone types. 'More results' reveals a simple search page, with content type tab result filters. There isn't any stemming or alternative spelling suggestions, which would be a nice touch. We like that a navigation breadcrumb trail is presented on results along with the publication date but a page summary would be beneficial too. Sorting and simple filter options

are only available for news and files, the ability to do this for pages and other results is on the roadmap. We think adding campaign topics as filter options would be helpful. People can preview files without having to download them, which is particularly helpful on mobile.

There are no metadata tags, although content hashtags, community themes, and campaign topics can help to a certain extent. Content labels are on the roadmap, as are promoted search results, both of which will be good additions to the site. There aren't any other search management features available.

In contrast, the people search works very well either via the main search bar or within the dedicated directory. The search indexes all profile fields and includes filters for them too. Fields can be fed from AD or an HR system, which could include training certificates. Alternatively, individuals could edit selected fields, and we like the potential to add fields such as 'also known as' or 'pronouns'. It's a shame there isn't an in-built org chart, as integrated approaches (such as



from Workday) opens people profiles within the third-party solution.

Knowledge finding also works well, where strong personalisation makes browsed content more relevant to the individual and bookmarks allow them to find things easily later. Accordion widgets and anchors aid navigation through content-heavy or complex information. We particularly like the on-page search that highlights where a search term is found when someone navigates to the page from the search results.

During 2022 Staffbase addressed some of the shortfalls in this scenario and things have improved, unfortunately there are still a few gaps in the search experience and management capabilities.

## 6. Admin experience and governance



score 4.5

Administration in Staffbase Intranet works very well, with uncluttered screens and simple options that make things easy. There are only four permission types, although these can be applied flexibly to grant many permissions or only editing rights to an individual page. When entering the 'studio' all admins are presented with a dashboard showing quick links to frequently used tools, such as the editorial calendar or campaigns, a feed of recently published articles, and

insights from the past seven days. From here admins choose a tab for 'planning', 'content', 'analytics', or 'email' (email is due to be moved into 'content' soon).

'Content' is where most administrative tools are found via a left-hand menu, which usually open pages of content presented as tables that can be re-sorted. However, 'news' and 'campaigns' lists of content areas can't be re-sorted, which may end up being difficult to navigate in large organisations. News can be published with expiry dates, but there are no other tools to manage old articles. Admins are able to see all pages they have permission for in a simple table, which includes when a page was last updated with a helpful flag if it has been "a while". Pages include version history tracking and saving, allowing old versions to be reinstated if wanted, as well as archive dates to 'unpublish' a page. It's also easy to deactivate or entirely delete a page from this table if wanted.

Pages, including the home page, are built using grids and widgets, which is a very flexible approach allowing admins to create pages as desired. Unusually it's possible to audience target individual widgets, which is helpful for protecting sensitive information or to create a country 'location' space with 'visiting us' widgets for those outside of the country in question.

Multi-language needs are handled well, particularly for end users who are able to translate everything on-the-fly through 'show translation' buttons. This functionality mimics social media behaviour, so customers may hope that inaccurate translations will also be familiar without placing the blame on the organisation. For official translations, publishers choose the relevant language from a drop-down that copies and translates the content for editing. The two versions remain linked, but any changes to the original aren't flagged to the translator and aren't automatically applied to the translated page. We like that publishers may also send notifications in multiple languages where wanted.



## 7. Analytics



score 4.5

Analytics in Staffbase Intranet are among the best we've seen across all products we've reviewed, with the option to expand further through APIs for third-party analytics tools if desired. Please see the Highlights for details. The analytics are split into news, content, chat, and users, and present highly detailed and attractive charts of results. Charts can be interrogated using sorting and filtering, with helpful percentage summaries or pop-outs to

explain what a chart is showing. There are no analytics associated with search and we think the presentation of results for 'pages' could be improved, and happily both of these items are on the roadmap.

Features across Staffbase Intranet include good levels of reporting. Every post includes statistics presented as simple yet attractive charts that are easily accessible on desktop and mobile. Chat and communities include usage rates, and each email sent through Staffbase Email has its own data that helps build a picture of overall email engagement too. Survey and poll results are captured within the individual survey or poll and require a minimum number of responses before results are presented.

Communicators will welcome being able to see overall success by channel and for individual posts. They will also appreciate the campaign feature, which gathers all content published under an associated topic then presents performance analytics for each item and for the campaign overall. We particularly like that notifications for individual parts of a campaign can be triggered from this screen to help boost the overall reach.

An 'acknowledgement' button can be added to any page, which an end user must interact with to log their response. Helpfully, publishers are able to easily re-send push notifications to those who haven't acknowledged and / or haven't visited the page. Results are viewable within the individual page, can be exported to CSV, or may be exported via an API into a third-party system if required.

## 8. Digital workplace integrations

score 2+

There is a wide range of APIs for partners or clients to develop integrations. Some of these may then be made available to other clients, expanding what is a fairly limited selection out-of-the-box at present. One example is a client who used an API to share a link to an annual survey to all employees via the chat, which provided them with a personalised message and unique link. This is now something other clients could make use of.

Overall, what integrations are available have been carefully thought through. Firstly, there are links that use single sign-on to grant access to third-party systems; while this is typical, what's unusual is that links will open inside Staffbase. This is particularly helpful for app users who may not want to download all company tools onto a device, especially if it's their own. Another good integration is a configurable form that will kick off workflows into solutions such as ServiceNow, allowing people to log tickets and see updates via notifications without needing to log into an external system.

Staffbase has also partnered with a company called Neptune to facilitate shift management,



leave requests, time sheet submissions and similar activities that require some sort of calendar approach. Associated activities, such as a time off request, pass into the source system for approval while notifications are displayed back to the end-user in Staffbase Intranet. The styling is very much Staffbase, with functionality in keeping with the rest of the platform that will make associated activities easy for people to complete.

There is a Google integration that displays calendar and library content within a widget. There's a local search for documents within the library, but clicking on anything takes the user into Google. No other document libraries are integrated out-of-the box and federation of any integrated solution would have to be set up by Staffbase or a partner.

## 9. Microsoft 365 integration

3.5+

While integrations with business systems are fairly basic, there are more options with the M365 integrations. In fact, Staffbase Intranet delivers one of the best ranges of M365 integration options among the independent intranet solutions we've seen (please see the Highlights for details).

Firstly, it's possible to create a 'my page' type dashboard using widgets, which draws together content from across M365 such as recently opened files, or

Teams that are available to join. The 'my page' approach is unusual among independent intranet solutions and is delivered well. Alternatively, businesses don't have to follow the 'my page' approach, instead they can add these widgets to any appropriate page. Staffbase also makes good use of Power Automate to create workflows, for example to pass activities from forms into MS Teams.

Another M365 widget includes the ability to embed a document, most notably a PowerPoint, directly in a page for ease of reading. There is also a Yammer widget that will embed a feed onto a page, but Staffbase say this isn't used frequently enough to be available as standard (as Staffbase Intranet provides an alternative to Yammer) so can be added on request.

Where SharePoint is being used as an intranet for parts of the business or for document storage, it's possible to present Staffbase news within web parts on the home page. This aggregates comments and reactions, so people see the same thing no matter the environment, and SharePoint is a source in associated analytics. SharePoint content can be federated within the Staffbase Intranet search too and presented in its own tab of results.

People can open Staffbase Intranet via the Viva Connections app in MS Teams. In late 2021 Staffbase purchased Valo, a SharePoint intranet in-a-box solution, and much of the Viva integration development is connected with the roadmap associated with the development of both products (Staffbase and Valo) together.



## 10. Wildcard



Over the past few years Staffbase has gained a huge amount of investment, which has been used to develop the product and purchase complementary solutions. This has resulted in a very strong communications tool that allows publishers to easily reach people across device types, potentially meeting them wherever they choose to work. The integration options with M365 applications is a good example of this, see Scenario 9 for details.

The purchase of Bananatag in early 2021 evolved into Staffbase Email, which has excellent functionality (see Highlights) to create effective newsletters. Staffbase has recently addressed many of the issues of bringing two tools together, for example email distribution groups may now use intranet groups; it now feels part of Staffbase Intranet whereas we had previously felt it was a little standalone. There are still a few issues to address, for example it would benefit from being brought into the main admin screens, but it's a very strong newsletter tool that meets organisation email needs well.

In mid-2022 Staffbase acquired a majority stake in dirico, which introduced employee advocacy features and publishing to external channels. This is evolving into Staffbase Communication Control that enhances the campaign concept (mentioned in Scenario 3) by bringing all types of communication, whether internal or external, under campaign topics for ease of management and tracking. This will help communication colleagues collaborate easily in one tool, which in turn will get messages out consistently and improve employee experience. What we saw seemed more complex than Staffbase Intranet's effective admin approach but can understand the benefits this functionality will ultimately bring communicators. There is still work to do, therefore, to bring the features together and we hope the effective Staffbase Intranet interface will be protected.

A final area that Staffbase developed is a simple digital signage solution. This uses content already published on the platform and displays in signage that is associated with a location. Posts include QR codes to encourage people onto the app, while also making people aware of surveys or business updates. It's a simple but effective solution to reach people in factories or reception areas.

Overall, Staffbase Intranet provides a lot of routes to reach people where they prefer to be reached with content that's relevant to them. In a world of hybrid comms channels, Staffbase provides a simple single solution to address many comms needs.

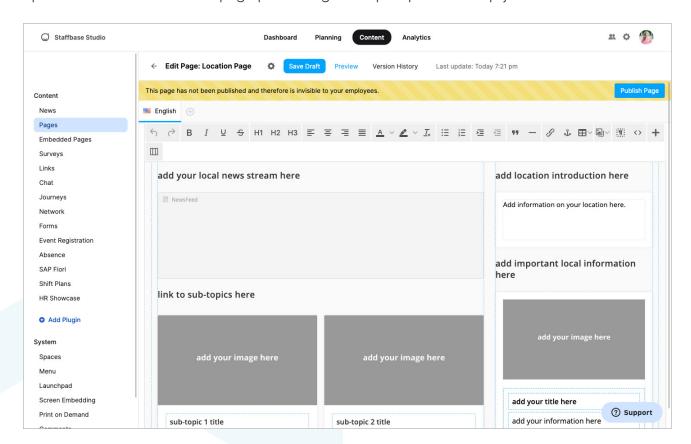


# **PRODUCT HIGHLIGHTS**

## **Creating pages**

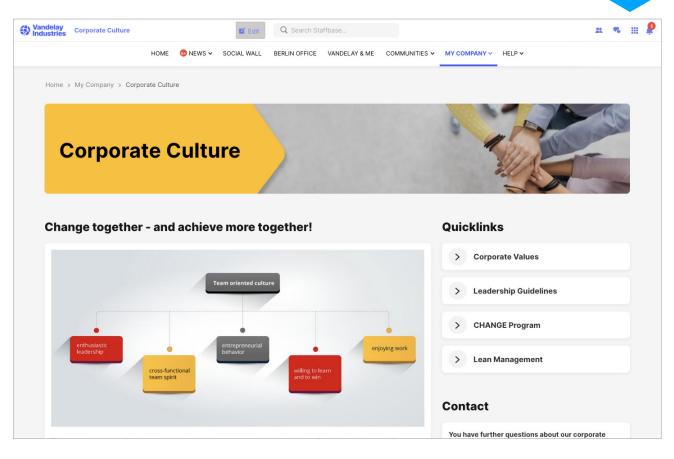
Whether a static or reference page, or a news article, the interface for creating pages is consistent in Staffbase Intranet. The only difference is where the page is stored in the left-hand menu in the admin screens and ultimately where it's displayed to end users. On creation, publishers choose whether to start with a template that has been configured by an administrator, or start from scratch with a blank page, depending on the result they want to achieve. Pages are built by dropping in different widget types, such as a multimedia embed, buttons, accordion, or a document library, making it simple to build highly effective pages.

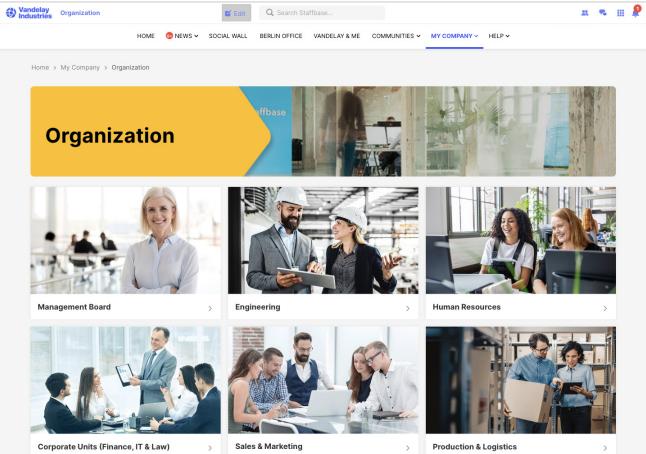
The result is a series of pages that can look very different, yet meet the needs of the publisher and the page's purpose. This could be for a global news article, a landing page made up of buttons, or a reference page presenting a complex process simply.



The page creation screen is simple to use yet provides a variety of flexible options.







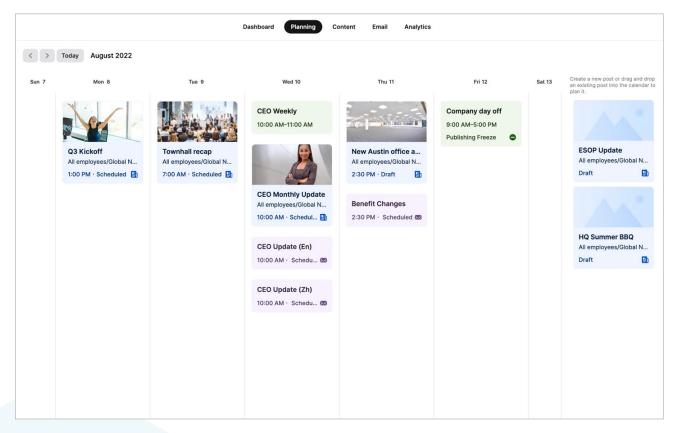
The resulting pages can look very different from each other and meet the needs of end users who navigate to it.



## Managing news and reaching people

Using the page creation screens makes it easy for publishers to create attractive and engaging news articles. However, managing the flow of news and reaching people effectively wherever they are, can often be challenging for internal comms teams. Staffbase Intranet provides a variety of tools to address these needs, starting with a highly effective editorial calendar.

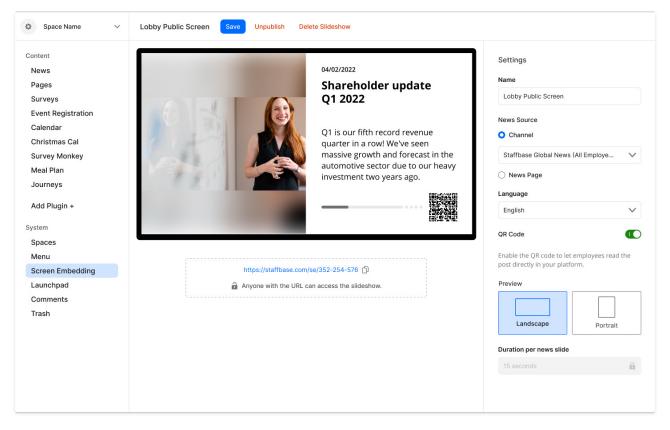
The calendar provides an overview of published, drafted, and scheduled articles that you have permission to see, allowing you to click into each and edit as needed. We particularly like the 'blockers' that indicate a busy publishing day, or that show a company event. These help publishers outside of the comms team understand where peoples' attention might be, and therefore why publishing on the day of a company conference might be a bad idea.



The editorial calendar is helpful for all publishers, not just those in the internal comms team.



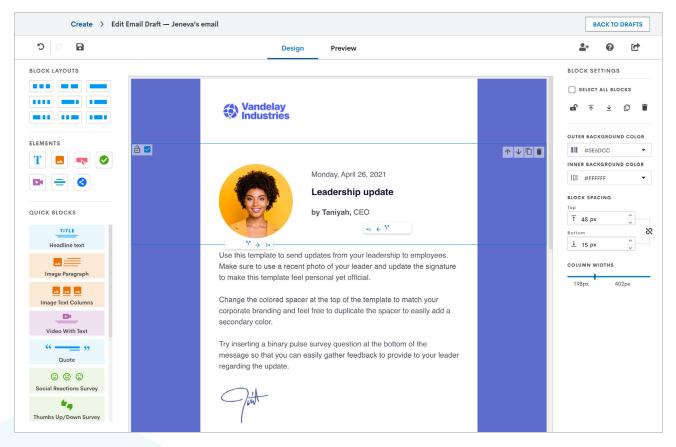
Staffbase Intranet provides a variety of effective notifications, including push notifications on mobile. The interface works very well on mobile overall (which you can read more about in our other free report), and so can effectively reach people on multiple devices. Although reaching people elsewhere can be a challenge, it is something Staffbase Intranet tackles very well. For example, selected pages can be displayed via a simple digital signage solution to reach people in person. The article summary is displayed with the title and associated image, alongside a QR code to encourage people to read more.



Digital signage content is easy to schedule and previews nicely in admin screens.

To reach people on their computers but outside of Staffbase Intranet, there are options to integrate with other business applications (see a below Highlight) and also to reach people in their inboxes. Staffbase shows that email isn't dead with this fully featured and superb email builder, which is among the best we've seen. The admin interface is consistent with the page builder, using drag and drop of different blocks of content types. Multiple people may edit at the same time, a feature we particularly like, and links to Staffbase Intranet content can be added in.

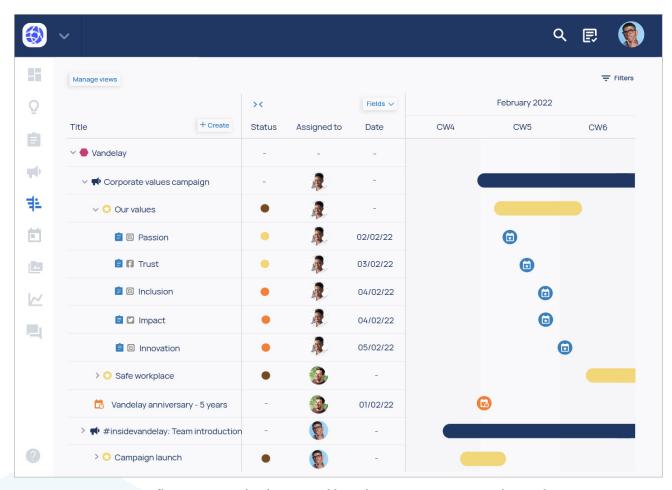
The email tool uses Staffbase Intranet groups for distribution, so there is no need to maintain separate lists. People are then able to interact with parts of the email from within their inbox, which includes things like adding comments, or completing a survey. This encourages people to interact with content and activities while allowing them to remain in their inboxes.



The Staffbase Email tool is excellent.



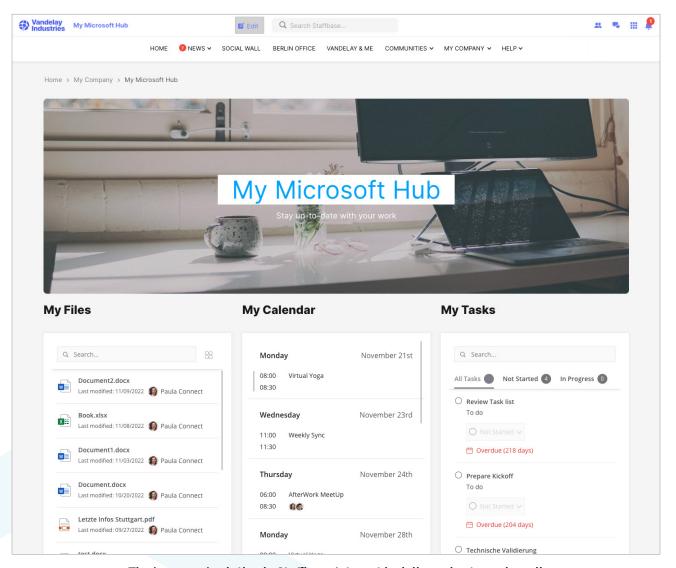
Finally, a recent addition is employee advocacy and public-facing publishing functionality through the newly acquired dirico solution, soon to be called Staffbase Communication Control. You can see from the below screenshot that it looks quite different from Staffbase Intranet at present, yet it brings handy functionality to help communicators reach digital channels beyond a business' infrastructure. There are integrated campaign options, scheduling, and a separate creation tool that allow for publishing on company websites or social media channels. While still in its early days, we can see the benefit it will bring and look forward to seeing it evolve.



Staffbase Communication Control introduces a way to manage internal and external communication, along with employee advocacy.

## Making good use of the Microsoft suite

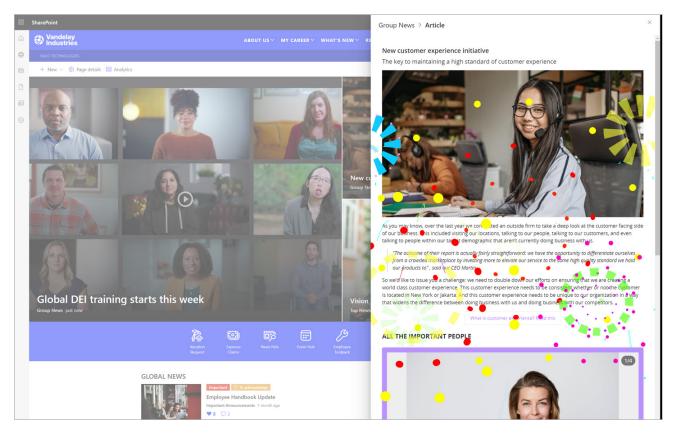
The Staffbase Intranet integrations with the M365 suite are very strong, particularly considering that it is an independent intranet solution. The integration options have been developed with care and provide functionality that clients have requested. The first example is a 'my page' type dashboard using widgets, which draws together recently opened files, upcoming events, outstanding tasks, Teams someone belongs to or are available to join, MS Teams feed and chat activity, and OneDrive content.



The 'my page' solution in Staffbase Intranet is delivered extremely well.



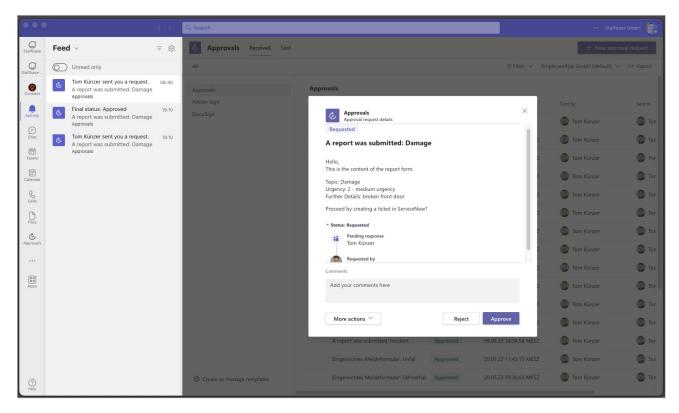
Where SharePoint is being used as an intranet for parts of the business or for document storage, it's possible to present Staffbase news within web parts on the home page. News articles are presented as a pop-up on the SharePoint page and respect creative and formatting choices, such as animations, from Staffbase Intranet. Comments and reactions are aggregated, so people see the same thing no matter the device or environment they're using. 'SharePoint' is a source in associated analytics, so publishers are able to track where people have seen the article.



Staffbase Intranet will integrate with SharePoint, acting as a communications layer on top of the strength of SharePoint's document storage. Staffbase features are brought across too, including animations.



Staffbase Intranet is accessible via the Viva Connections app in MS Teams, bringing it inside the collaboration tool as if MS Teams were a browser. As mentioned above, MS Teams activity is viewable within Staffbase widgets which will be helpful for casual users of MS Teams. Additionally, Staffbase makes good use of Power Automate to create workflows. Activities from forms can pass into MS Teams and with some configuration, Staffbase Intranet notifications could pass into MS Teams' activity bell. If publishing workflows are wanted, Staffbase say Power Automate could serve that role too.

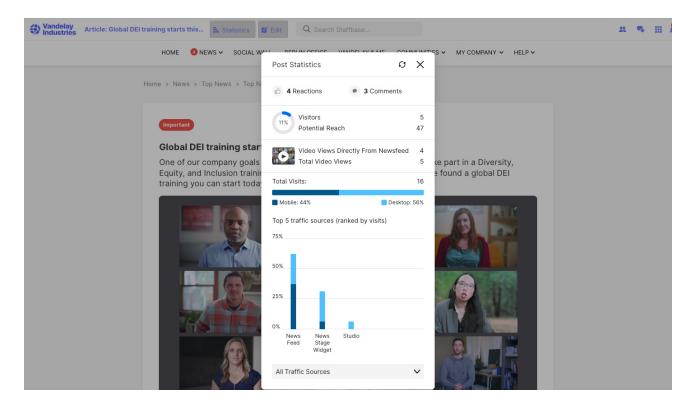


Notifications from Staffbase Intranet and the output of forms can be configured to display, and be actionable, within MS Teams.



# **Analytics**

The range of analytics within Staffbase Intranet are impressive and among the best we've seen in any product we've reviewed. We like that there are different levels of reporting available too, so publishers and admins will see only what's important to them. Every post includes statistics detailing reactions, comments, visitors, and where the post was viewed, such as 'news feed', which is further split by device type. These stats are presented as charts that display well on desktop and on mobile, so senior leaders can easily see the success of their latest blog post while they're on the move.

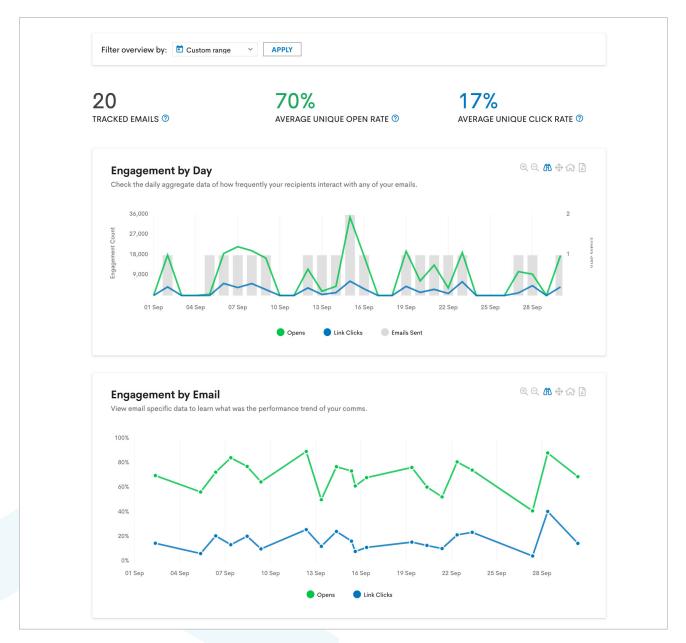




The same charts are available on desktop and on mobile.



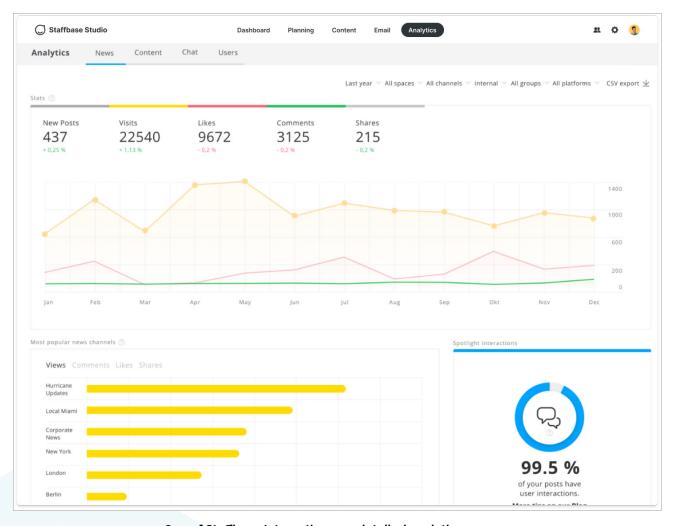
Email has its own statistics that include a good level data of overall engagement, such as average unique open rates, unique click rates, and engagement by day. There is also data for each individual email, presenting information such as average read time and heat maps of popular areas. These analytics provide real insights that allow publishers to make changes to subsequent emails.



Email analytics are detailed and helpful, providing true insights into the success levels of this channel.



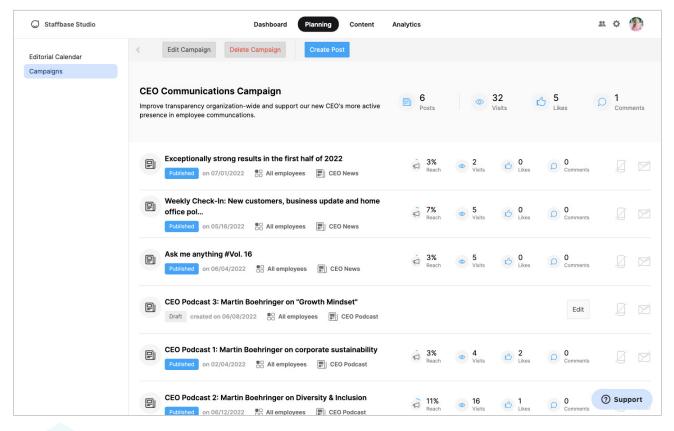
In the Analytics tab in the admin screens there is data on news, content, chat, and users. Example charts include a heatmap of when people are active, which channels people are visiting, the number of comments posted, and the percentage of active users. The charts are filterable and sortable, so admins can interrogate what's presented to answer the questions they may have. We like the helpful percentage summaries and pop-outs to explain what a chart is showing. Communicators will appreciate being able to see the success of individual channels and of individual posts among the data too.



One of Staffbase Intranet's many detailed analytics screens.



Finally, Staffbase Intranet includes an excellent campaign feature that gathers all content published under an associated topic. The performance of the overall campaign and the individual content within it is then aggregated and displayed, providing communicators with an idea of the reach of the campaign. Where a post or campaign needs a boost, there is an option to send email and mobile notifications to those who haven't seen a particular post for example. While the results for campaign content will also be visible in the main analytics menu, we think it's helpful for communicators to be able to focus on the topics and content that's strategically important.



There is an excellent campaigns feature with helpful associated analytics.



# THINGS TO BEAR IN MIND

Overall, Staffbase Intranet facilitates content well, such as through good personalisation, attractive page builds, and news management features. However, we think it would benefit from the development of features to complement and enhance content so that it better addresses needs of traditional intranets. For example, offering engagement features like gamification, upvoting comments for simple ideation, or templated 'kudos' posts for recognition would fill some gaps and enhance the social aspects of the site. We also think that Staffbase is a less obvious 'digital workplace hub', as the available integrations and transactional features as less fully developed than other products we've seen in this report. Developing practical aspects of the platform would also help, such as improvements to search and content governance.

Staffbase Intranet has evolved quickly since it was first released in 2019 however, and many areas we would like to see developed are on their roadmap. Staffbase also clearly listen to feedback from clients to evolve the platform, meaning that something the platform doesn't do today could soon end up as a feature if enough people ask for it.

The speed of development is also associated with the level of funding Staffbase has received, along with the purchases of Bananatag, Valo and dirico since early 2021. Many of the strong communications features have been introduced to Staffbase Intranet because of these purchases, with much more functionality still being added. We hope that Staffbase Intranet's simple and flexible approach will continue as these features are added however, as with the addition of functionality comes the risk of over-complication.

## Why choose this product

It's unusual for a product to wholly reflect a vendor's marketing and strategic positioning, yet Staffbase Intranet is an exception. The origins as a mobile-first employee mobile app solution are clear to see across the platform, which addresses frontline and small-screen needs sympathetically. Alongside, its features for communicators are excellent from creation up to measurement. All this means that Staffbase Intranet is likely to be high on comms teams' shortlists, and it's certainly one worth exploring.







# Our view in one tweet

@WeAreUnily provides an engaging employee experience with powerful publishing wrapped up in a simple package that's a delight to use.



Founded in 2005, UK-based Unily is an employee engagement-focused intranet product that delivers an excellent experience across its well-integrated range of features. It creates attractive, easy-to-use intranets that meet the needs of complex global organisations thanks to its sophisticated communication, branding and administration capabilities. An effective mobile app also extends intranet access for organisations that need to reach employees away from desktops.

Unily comes with a selection of commonly needed templates, including home pages, an 'about us' site and a 'brand hub' that will help accelerate building-out a new intranet. Content editors and intranet admins will appreciate the simplicity of finding and using the features they need. The admin interface is well-structured and simple to use, enabling non-technical users to configure many aspects of the product.

Most editors will be able to simply browse to the page they own and enter edit mode from there. More

sophisticated publishing needs are supported with flexible layouts, dynamic audience targeting, and multilingual machine translation support. Campaign management and activity planning features help internal communication teams plan, execute and track the success of timeline driven, multi-event, goal-focused communication, social engagement, and activity-oriented campaigns.

Microsoft services are well-leveraged for authentication, translation, documents and search. Integrations with other digital workplace tools such as Concur and ServiceNow are available, if fairly modest in functionality. Unily Social provides community capabilities but could benefit from some usability improvements.

Mainly appealing to larger organisations, this top-tier product comes with a top-tier price tag for clients of all sizes. However, for those that can use the full feature set, Unily represents great value for a well-integrated suite of capabilities.



## Summary table of scenario scores

## NO. SCENARIO/SCORE User experience and visual appeal 1 Mobile and frontline support 2 Internal communication 3 Community and engagement 4 Information finding and knowledge management 6 Admin experience and governance **Analytics** 7 Digital workplace integrations 8 Microsoft 365 integration 10 Wildcard

## **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### PRICING MODEL

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, frontline users.

Price includes: Project workshops, training for admins, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, Microsoft 365 set-up, hosting, onboarding user data, access to a community & webinars, consulting services, training for content publishers.

## Key benefits

- Unily has an attractive design and easy-to-use interface for employees, editors, and admins alike.
- Branding support is excellent and likely to meet the most exacting brand manager's demands, including lightweight digital asset management. Support for multi-brand organisations works well, too.
- The campaign management feature makes it straightforward to plan, execute and track communications and employee responses, while a new publishing calendar helps with 'airtraffic control'.
- The mobile app gives a good intranet experience for employees on the go and can be further optimised for mobile-specific use cases.

## Improvements and considerations

- Unily's 'Social' provides community-based collaboration but its features and usability have fallen behind those of some other products we review.
- Integration with Microsoft 365 is effective, particularly around search and documents, but there's no integration with the Viva suite.
- You get value for your money if you can use all the functionality that Unily provides but the price-point is high compared with other products reviewed in this report.



## **Product type**



## **Branding opportunities**

All branding, complex options

## Target businesses



**SMALL** less than 1,000 people



**MEDIUM** 1,000 to 5,000 people



**ENTERPRISE** 

## Base systems









**Fully** standalone

Requires SharePoint Optionally works with SharePoint

Other

## **Sectors**







Healthcare



**Energy and utilities** 



Hospitality and events management



Business, consulting and management

## You may also be interested in...









# **COMPANY AND PRODUCT**

## Company details



Company Unily



Company founded

2005



Company locations

Surrey, UK (HQ), USA, Australia, Canada



ISO 27001 certified

Yes



Typical client size

50,000 employees



Largest deployment so far

300,000 in 150+ countries



Partner locations

None



#### Customers

Clients include: Shell, Estée Lauder Companies, Baker Hughes, British Airways, Cardinal Health, McDonalds, Adecco, Canon, Stantec, L'Oréal.

## Product and technical details

Name of product	Unily
Product launched	2015
Current version	13
Accessibility	WCAG 2.1 compliant



#### Deployment

Client onpremises

Client private cloud

Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant

Other

#### Data residency

UK, US, Canada, Netherlands, Ireland, Australia, Hong Kong and Singapore, but technically all data centres available in Azure.

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active Directory

**ADFS** 

Open ID

Oauth

**G** Suite

Other

#### Search technology

Apache Lucene/ Solr Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

## Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other\*

\*Unily has an integration framework for connecting to other document management systems.

## SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

## Mobile app deployment

Google Play store

Apple store

**MDM** 

MAM

Other\*

\*Various app stores in China.



#### Reverse-out options

Client data is handled in accordance with the client's request, this can include deletion of all data and data exports.

#### Languages supported

English (United States), English (United Kingdom), Amharic, Bulgarian, Chinese (Simplified, PRC), Chinese (Traditional zh-Hant), Czech, Danish, Dutch, Estonian, French (France), French (Canada), Finnish, German, Greek, Hindi, Hungarian, Indonesian, Italian, Japanese, Kiswahili (Kenya), Korean, Latvian, Lithuanian, Malay, Norwegian, Bokmål (Norway), Polish, Portuguese (Portugal), Portuguese (Brazil), Russian, Slovak, Spanish (Spain), Spanish (Latin America), Swedish, Thai, Turkish, Ukrainian, Vietnamese

#### Machine translation

Yes - via the product

#### Right to left script

This is an item currently set as medium priority on Unily's customer driven roadmap.

## Set-up and support

#### Set-up process for new clients

Unily's Implementation and Consultative Team and Services are in-house. The mix and match implementation package is built based on customers' requirements and the Unily modules they purchased. It has 5 key phases: Initiation (knowledge & setup); Define (requirements & business mapping); Design (platform consultation and implementation preparations based on defined requirements); Configure (consult, build, publish) and Launch (beta, pilot, full-launch inc. stabilisation and hypercare period). Depending on the client's requirements, launches could be 8-12 weeks, or for larger, more complex scenarios 6-8 months.

## **Product updates**

Roughly one major release a quarter. Unily's Feature Store has updates and new features every month; these Feature Store releases do not require upgrades to be installed and can therefore be installed on demand.

## Product update process

Unily works with customers to define a plan for upgrading to newer versions to a timescale that meets their business requirements. This process is managed by a dedicated customer success manager. Feature Store features can be installed on demand, supported by customer success managers.



#### Technical support

A full-time team based in the UK covers EMEA, APAC, and NAM in all time zones offering an all-day, every day service. Unily also offers an optional premium support service that includes a dedicated technical account manager to oversee all technical aspects of a customer site.

#### User community

Universe, Unily's online customer community, is developed and maintained by a dedicated team. Monthly webinars give the community an opportunity to speak 'face-to-face' with the team and likeminded customers, and targeted social forums support day-to-day interactions. The forum includes roadmaps and an ideation section for feature suggestions. Unily also hosts its annual employee experience conference, covering all things digital employee experience and employee engagement with expert speakers, networking opportunities, and plenty of opportunities to have fun.



## In their own words

Unily says: "Unily is the employee experience platform that connects, informs, and engages your enterprise. We recognize that achieving incredible employee experiences is a journey, and we guide our customers on this journey by dividing our full platform capabilities into four modules. Each module contains features directly aligned to an organization's employee experience maturity, providing a structured path to increase employee engagement supported by a trusted partner."

## Their view of the marketplace

Unily says: "Successful enterprises recognize that engaged employees are their greatest asset. In an increasingly hybrid and remote world of work, ineffective communication, increased disconnect from culture and mission, and antiquated and fragmented tools all impact employee engagement. Unily is the employee experience platform at the heart of the digital workplace that empowers every employee to do their best work."

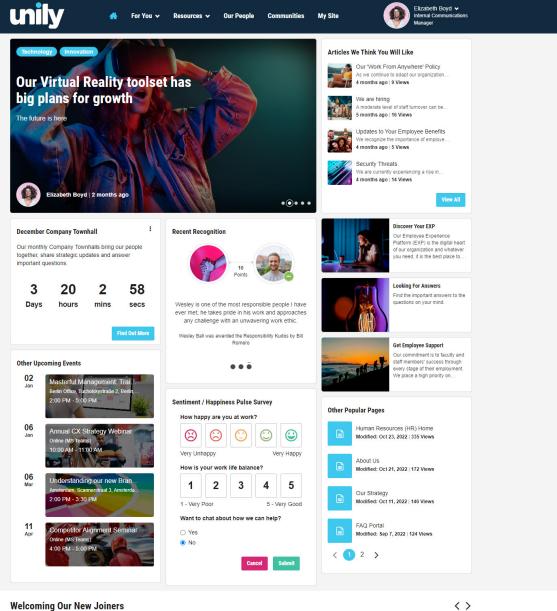
## Voice of the customer

Unily customers praised the product for its range of features that are simple to use while being well designed and attractive. One customer was clearly getting good value, listing many features of the product and service as highlights, summarising that Unily is, "easy for front end users to use and navigate, and easy to use for CMS administrators". Another agreed, saying, "the front end of the platform looks great. Very clean and modern. There is also a good selection of widgets for creating content". One intrepid communications professional enthused about their independence from IT, sharing, "I am not a developer, but I was able to build the site, train a team of 80 others in the company how to manage their own pages, and continue to manage content and updates to the platform".

Improvements that customers would like to see centred around existing functionality and managing product updates. One customer mentioned they would like the email newsletter, "further improved to make it equal standalone providers". Another added, "the email templates are very limited". Social also came in for comment with one customer wanting, "it to function like commercial social media platforms where it's more intuitive and responsive to the user". Product updates and changes seem to cause some bother with one respondent saying they, "have to work through their account manager to add the latest features to their content management system". While another found it, "difficult to keep up with the pace of change and risk things not working as well if they become out of date". One respondent found getting some product changes difficult, saying "most everything is out of the box, but if you want it customized at all, in any way big or small it's pretty frustrating. You're either told it's a quite expensive and long customization process or you just can't do it".

Customer experience of working with Unily as a partner is generally positive with one enthusing, "on the whole, Unily is great, they're always updating their product, bringing out new features and providing opportunities for online and in person engagement". Another appreciated the ongoing support they have had saying, "after your site is setup, you work with a Customer Success Manager (CSM) for on-going support and updates. The role of the CSM at Unily has far exceeded our expectations compared to customer support roles with other communications vendors". Adding "the Unily support desk is also top-notch and responds quickly to technical issues that arise". Not everyone is happy though and some customers have been through difficult times. One summarised, "It's been challenging", having been disappointed with the service they've received. Another shared "It's 'OK' now, but we've been through multiple rough patches, having to change our customer contacts and speak with management. It's been the roughest part of the process".









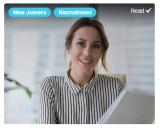
Welcoming Drew Estrada to the HR Team Our HR Team expands further with a fantastic addition

25 days ago | 3 Views



Virgil Wilkins has joined as IT Support Virgil Wilkins has joined the IT team as a support engineer.

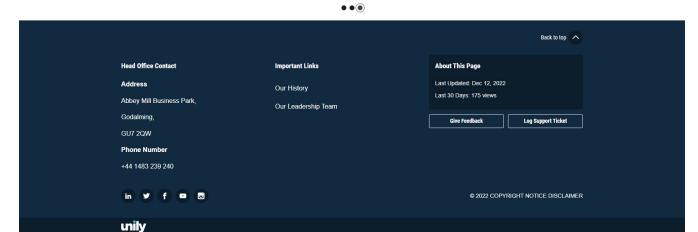
a month ago | 4 Views



Welcoming Kim Gordon our new US Sales

Welcoming Kim Gordon our new US Sales Director

a month ago | 2 Views



# **REVIEW**

## 1. User experience and visual appeal

score 4

Unily has a consistent and contemporary interface that employees should feel comfortable with quickly. Content components such as text and images have plenty of space and styling options that reduce visual clutter. Buttons and switches for options and settings are the same throughout the product. We particularly like the consistent use of the contextual 'more' menu, represented by a vertical ellipsis, for a range of interactions with people and content.

However, there is no feature walkthrough to help with adoption for new users, a missed opportunity for a feature-rich platform like Unily.

There are three levels of navigation in Unily. The icon bar at the top provides links to company apps and tools including Microsoft 365, topic personalisation, followed content and people, and notifications. Tooltips explain the icons. The global navigation provides configurable, audience-targeted links to 'Workspaces', pages, sites, and social communities. Workspaces are Unily's somewhat idiosyncratic answer to mega-menus and may initially feel unfamiliar to employees. Sites within the intranet (e.g. HR) have their own local navigation below the global nav to provide easy access to their content. Profile-based targeting applies to the navigation, footers and content widgets.

Notification functionality is extensive, covering content, social, gamification, security, and third-party application events. Unily has options for how notifications are delivered: via the bell icon in the top bar, app push, and email. These options can be fully under the control of employees, defaults chosen, or settings fixed by the organisation.

Branding options are sophisticated, with colour, imagery and typography choices organised into 'themes'. Multiple themes in one intranet are possible, being applied to specific sites or based on the audience profile, providing flexible options for multi-brand organisations.

## 2. Mobile and frontline support

SCORE 3.5+

Mobile access is via responsive web and native apps for Android / iOS. Employees log in with existing credentials where available; Unily supports OpenID connect enterprise identity providers such as Microsoft, Google, Ping, and Okta, as well as Social ID providers such as Facebook and LinkedIn. Employees stay logged-in to the app until they log-out, making subsequent access easy. There is no support for biometric authentication.

The standard Unily app download is straightforward via the Apple / Android app stores; Chinese app stores such as Tencent MyApp and Huawei App Market are also supported. A custom-branded option is available at extra cost for clients with mobile device management platforms such as Microsoft Intune. Client-branded iOS apps can also be distributed via Apple

Business Manager. Client branding within the mobile experience is applied for both the standard and custom-branded apps.

The mobile experience is engaging and largely consistent between the app and the responsive web version, although the app has the added benefit of push notifications and offline reading for newsfeed content. Main navigation items, like home and social, are at the bottom of the screen, with a hamburger menu providing access to Workspaces and other links from the global nav. Unily's grid and widget design system supports variants, so different navigation options, features and content can be shown on mobile versus desktop versions of pages to optimise the mobile experience. In particular, Unily has recently optimised the mobile experience for people profiles and ideation.

Search in the app gives a comparable experience to the desktop version, with results appearing and refining as you enter text. The same options for filtering results are also available. Gestures such as pull-refresh and swipe-left-delete will be familiar to users.

Frontline workers have access to a built-in shift calendar that integrates with third-party shift management systems such as Workforce.com. This allows them to see allocated shifts, request changes and check-in or check-out from within the Unily app.

## 3. Internal communication



SCORE 4.5

Internal communication features are strong; news story creation is straightforward, with a form-based approach capturing elements such as topics and publish dates. Multiple templates are available, which can be built by the client as well as be part of the implementation. Newest content goes at the top of the home page by default but the 'featured' option overrides this. A workflow allows content to be sent for approval, with those responsible receiving a

notification. There is a list view of content awaiting approval, publishing, or published and a comprehensive calendar view gives oversight of all scheduled activity in the CMS. Please see the Highlights section for details.

Audiences are created by adding employee groups (e.g., based on department) and individuals. Dynamic audiences can be built from rules, with a visual builder making it simple to create profile-based audiences. We particularly like that one dynamic option is date-based rules, making it straightforward to create a group for new starters for example. Employees can complement targeted information by subscribing to topics of interest with the 'personalise' menu.

Unily supports urgent communications in two ways. The broadcast centre enables notification broadcasts of a short message to desktop, mobile app and email. Alternatively, announcements provide highly visible messages that can be audience targeted and shown on the home page or specific sites. Again, these trigger notifications.

News stories can be promoted via a social channel and 'broadcast' to Teams and Slack. The broadcast centre also enables communicators to select stories and other content for promotion via a personalised email digest. There is support for employee advocacy with publishers able to add the option for employees to share a short part of an article via social media. What is particularly powerful is that many of these activities can be planned and executed via the 'Campaigns' feature (see Scenario 10).

Reference pages are created using Unily's grid and widget system that provides a lot of flexibility in layouts and components. Widgets can be dragged and dropped around the page so video, imagery and text can be placed where needed.



## 4. Community and engagement

SCORE

Unily's 'Social' area is the centre for communities and knowledge sharing. 'Channels' serve the different use cases and are public or private, with each showing trending hashtags and top contributors. We would like to see the ability to add a heading when starting a new discussion thread. Blogs are available and use a simple form-based approach, which is similar to the news template.

News stories and static pages support commenting and the interaction capabilities described above. @mentions in published content is useful but could be improved as the result picker for @mentions is limited to 5 results, which do not scroll, and matches surname as well as first name. In large organisations, users will often end up having to type the whole name to get the right person. Comments include #tags and image / video uploads, but there is no emoji picker. There is no support for pasting images into a comment, which can be a little frustrating, and images always end up at the bottom of the comment. Moderation of comments is limited to a list of prohibited words. Social interactions include share, @mention, and customisable reactions. We really like that the reactions can be customised to align with company values, for example, and have a score assigned for sentiment analysis.

Unily's form builder is used to make pulse surveys, with ratings on a number scale, star icons or happy to sad faces. Feedback from these surveys can be shown on the page after voting. The form builder also builds quizzes, with scoring for correct answers and options for pass and fail messages.

Employees can be awarded kudos by peers and badges by managers, which generates a notification to the nominee. Awards can be themed, such as to tie in with company values, and show on the employee's profile page or a leader board. The mobile experience for awarding badges and kudos is easy too, which is a nice touch.

Finally, Unily's engagement automation features combined with dynamic audience targeting make it straightforward to target onboarding information and tasks to new employees.

## 5. Information finding and knowledge management

SCORE 1

Unily's search experience is a powerful and differentiating feature. Search results are presented in a large overlay panel that refines matches as you type. Results are shown in categories such as stories and posts with promoted results at the top. Hitting the enter key switches to a full-page search interface that allows results to be refined by category along with other metadata such as site or content owner. Results are clearly presented

in a list or grid with promoted results given priority at the top. The search experience is audienced, so frontline users could see quite a different set of results from management.

Unily's search is based on Elasticsearch, so the content of non-native content stored in Unily (e.g., PDF, Word etc.) is not indexed, only filenames and metadata. Documents stored in OneDrive and SharePoint are handled by the Microsoft API for more complete indexing. Promoted results are a powerful and welcome addition that enable admins to prioritise specific results when matching keywords are used. Fuzzy matching handles common typos and the admin interface exposes controls for relevance and recency weightings.



People search works in much the same way as content. Individual profiles can include a rich biography, tags for skills and links to content the user owns. Clicking the ellipsis icon next to the profile picture brings up a menu of options such as follow, award kudos, send a Teams or Slack message and call via Zoom. A dynamic org chart tool does a good job of showing team structures. Views can be configured for embedding on any page, for example to show the HR team on the HR site. Clicking the org chart expands the view so you can navigate the whole organisation.

Optional FAQ and Locations Directory templates are included in the price and can be downloaded from Unily's Feature Store.

## 6. Admin experience and governance

SCORE

Unily's CMS and admin interface has a clean, uncluttered experience that does a good job of simplifying the powerful and flexible controls available. There is one admin panel for settings and content management that is well organised and logical. We particularly like the search that makes it easy to find an admin setting if you can't remember where it is in the hierarchy; we wish more products included this time- and frustration-saving feature. The security design

provides for role-based access to different areas with a high degree of granularity. There is no new site request workflow as standard, but this could be built easily with the forms capability. Unily's 'Feature Store' makes adding, updating and removing optional templates and widgets a simple process.

Unily comes with several home page layout templates to get clients up and running quickly. These are themed around 'productivity', 'engagement' and 'knowledge' concepts and include different widgets accordingly. The 'grid and widget' system is visual and flexible enough for most organisations' needs, although please see Scenario 3 for an explanation of how targeting works. It is easy to manage and adapt page layouts with drag-and-drop of the various text, media, and functional widgets.

News and static content can have future publish, review, and expiry dates. Content owners are notified when their content is due for review and see the status of all their content in a 'My Content' dashboard in the CMS. Content passing expiry can be unpublished automatically but not deleted. Expiry can also apply to a whole site if needed.

Multilingual support is included both for the CMS and content, with the back-end including over 30 left-to-right languages. Right-to-left (Arabic, Hebrew etc.) support is not available yet but is on the roadmap for content. Multilingual content, including video captions, benefits from draft machine translation supported using Microsoft Azure Translator. Editors can check translations are of sufficient quality and make adjustments before publishing, but there is no workflow to help manage this process and keep translations in sync if things change. Users set their preferred language in their profile and can switch languages while viewing content as well.



## 7. Analytics

SCORE

Unily provides standard analytics to all customers, with a set of dashboards covering common measurement requirements. Custom dashboards are available via professional services. The standard offering is a good starting point though, while reporting for the campaign management feature discussed in the highlights section is particularly effective.

Each page's traffic is available from edit mode via the analytics tab, including a breakdown of desktop versus mobile views. The analytics dashboard provides an overview of traffic that can be explored further and filtered by organisation or profile information, such as department or role.

Search analytics is decent, with the ability to look at different data sources (the categories from Scenario 5) and search centres such as FAQs or policies, showing the number of searches performed and the top search terms. These search terms can then be selected as a filter to show click-throughs to content and its rank in the results. There is also the filtering ability mentioned above, so that search patterns in a particular part of the organisation can be studied. All the analytics can be exported to CSV for further manipulation in a spreadsheet.

Mandatory reads are included, showing up as a notification in the 'Following' section of the top icon navigation bar. This content can be targeted as you would expect and there is an exportable audit trail showing who has and has not acknowledged. If there is a 'due date' set for the notice, users can be effectively locked out of the rest of the intranet until the content has been marked as read.

Across channels, the Social dashboard is particularly interesting, showing which posts have the most engagement. It's also possible to see CMS activity to explore which sites are most actively maintained. Offline content reading on mobile devices is reported alongside other traffic measures. Finally, we like that there is the ability for clients to benchmark their usage against comparable Unily customers.

## 8. Digital workplace integrations

SCORE 3.5

Unily includes an expenses rollup from SAP Concur, a listing of ServiceNow support tickets raised and a Workforce.com shift calendar integration. All these integrations are presented seamlessly within the Unily experience. It's worth noting that clients can develop their own custom integrations or use Unily professional services, but there are no third-party developers.

Communication and collaboration integrations include the ability to share content to Slack and start a Slack or Zoom chat / call. There are also bi-directional Gmail and Google Calendar integrations that include the ability to download attachments, accept meeting invitations, delete messages etc. Again, all these features are nicely presented in Unily's pages, looking like any other piece of content or functionality.

Search integrations include Google Drive, Salesforce and ServiceNow Knowledge search, meaning that Unily's unified search will return results from those platforms alongside other results. In the case of Salesforce, certain interactions with results are supported such as initiating a call to a contact. Box is also supported including the ability to search and access Box files at a 'corporate' level, without the need for an individual account.

## 9. Microsoft 365 integration

SCORE 3.5

Unily's integrations with SharePoint focus on its use for lists and documents. This is understandable but means there is no 'news from SharePoint communication sites' rollup and no integration with Viva Connections. SharePoint sites, pages, lists and files are shown in search and there are searchable page widgets for SharePoint project documents and sites. Integrations are two-way as well; you can upload documents from Unily to a

SharePoint library while the ever-useful context-menu allows you to follow and unfollow SharePoint sites from within Unity.

In the background, Unily has implemented a Microsoft Graph-based search to improve the results and experience, meaning it also returns results from Outlook email and calendar. The context-menu for Office document search results offer 'open in app' and 'open in browser' like Microsoft Search. SharePoint data sync keeps user profile and metadata consistent across the two platforms in the background as well.

MS Teams integrations include a rollup widget that shows the teams you're a member of and their channels while a useful feed widget shows activity from a specific teams or channel and allows posts to Teams from within Unily. There is also the ability for publishers to trigger targeted notifications in Teams via a chatbot integration. People can share pages from Unily to their teams via a dialog box that allows them to pick the channel they want to share with. People can also start a Teams conversation via a colleague's profile, although their status (Available, Busy, DND etc) is not shown. In fact, the context menu that starts the Teams chat can easily be confused with the Microsoft status icon, so careful consideration needs to be made when picking the theme colour for this menu.

Yammer can be used as an alternative or in addition to Unily's social component. When used as a replacement, Yammer content is shown in the context of Unily with the option of presenting posts as a 'wall' of tiles, or the more traditional feed view. Similar to MS Teams, Unily includes a Yammer rollup feed and post to Yammer with the ability to pick the group.

Unily's 'My To Do List' widget integrates Microsoft To Do tasks into the platform and allows users to create, edit, delete and mark tasks as done.



## 10. Wildcard

SCORE

Engagement automation is a big focus area for Unily and this is realised through the excellent Campaigns feature in the product. Campaigns are an internal communications version of marketing automation, with a timeline or event-based series of activities themed around a particular objective (for example a product launch or company event) with associated goals and tracking. The capabilities are extensive within the Unily platform, being able to automate

activities including branding (theme) changes, content publishing, and notifications (intranet, app, email, MS Teams etc) based on a sequenced timeline, and targeted to defined audiences.

The feature makes it easy to define and track goals for the campaign. When setting up the campaign, the creator picks social channels and hashtags to monitor from lists. We particularly like the 'content goal' picker that suggests recently used content for campaign monitoring. Planners in multi-time zone organisations will also appreciate the time zone picker that sets which time zone will act as the base for all activities. The Timeline tab provides a clear visual indication of the planned events (email, social post, notification etc) and the sequence of dates in which they will happen.

Once the campaign is underway, the campaigns centre includes a detailed analytics section where performance against these goals can be tracked and measured by profile information, such as department or role, and devices used. Overall engagement with the campaign is also measured enabling organisations to get a clear idea of effectiveness. Please see the Highlights section for more about Campaigns.

The Campaigns feature currently is focused on time-based internal communications activities, such as promoting a product launch or company event. However, we can see potential for this to be extended to cover event-based employee journeys such as onboarding for new starters, annual reviews, benefits enrolment, or service milestones, increasing its value to the organisation beyond communications.



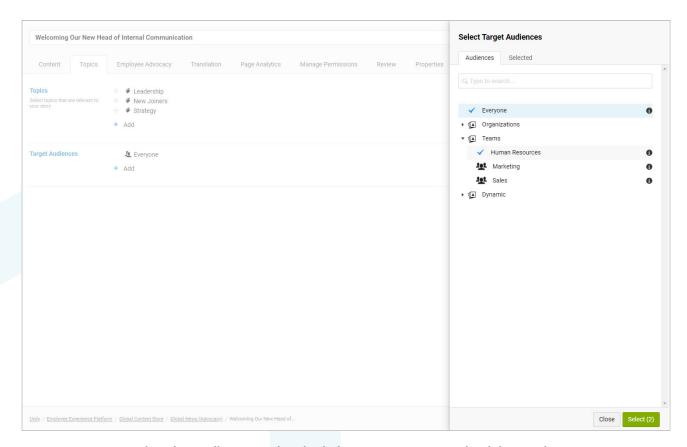
# PRODUCT HIGHLIGHTS

## Simple, targeted, multilingual news publishing

News publishing is one of the core strengths in Unily. The product makes this a quick and simple process, employing form-based templates and tabs that help editors through the steps and make sure all necessary information is captured. Templates are created to client needs but include options for stories to be featured, future publish dates, images or video and topics for opt-in targeting. The first step is putting the content for your story into the template as shown in the screen shot below.

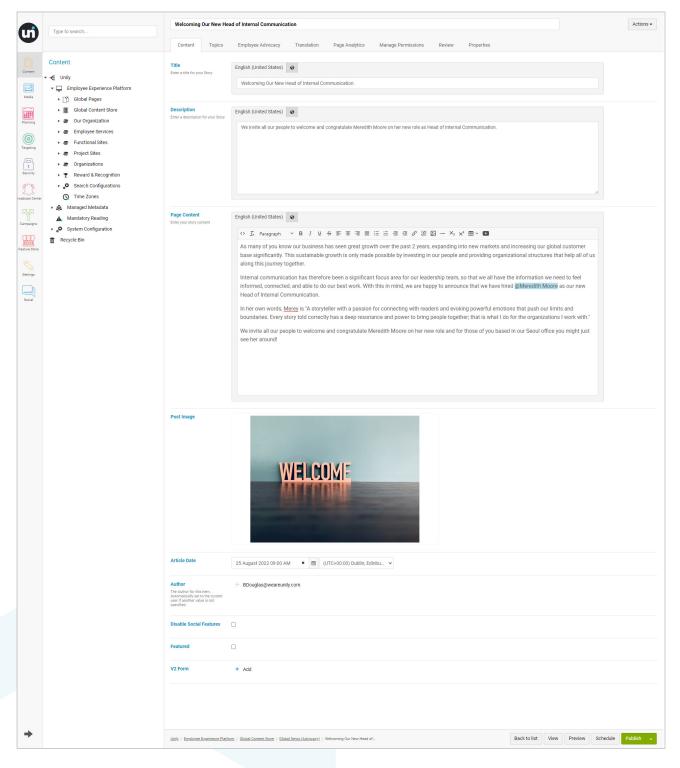
Text can be pasted from Word or other sources and we like that Unily will normalise fonts in line with the brand template, retaining bold, italic and underline formatting. This step allows editors to add images or video as needed. Future publish dates are available, along with tick boxes to enable / disable comments and a 'Featured' checkbox that gives the article prominence on the home page.

Content audiences are handled via the 'Topics' tab in the editor where 'push' target segments are chosen along with topic metadata that will mean the content is shown to people who have subscribed to that topic. The default 'push' audience for news is 'Everyone' but this can be changed in the template, with different page templates targeted at different groups. Choosing one or more defined audiences is a simple selection process as shown in the screen shot below.



Choosing audiences and topics helps target content to the right people.

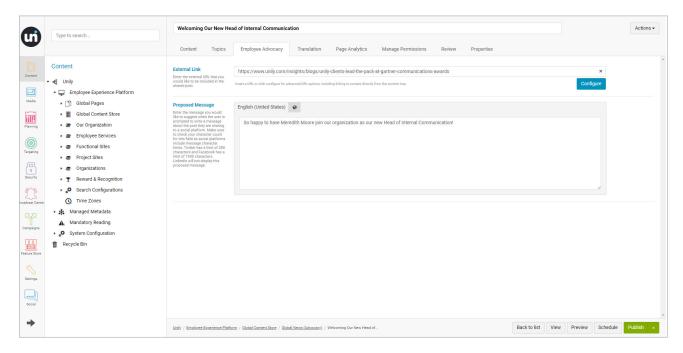




News creation in Unily follows a simple template-based approach.



Organisations looking to encourage employee advocacy can add information to help staff share good news externally. This includes adding an appropriate external link for the content and some suggested text for the social message as shown in the screen shot below.

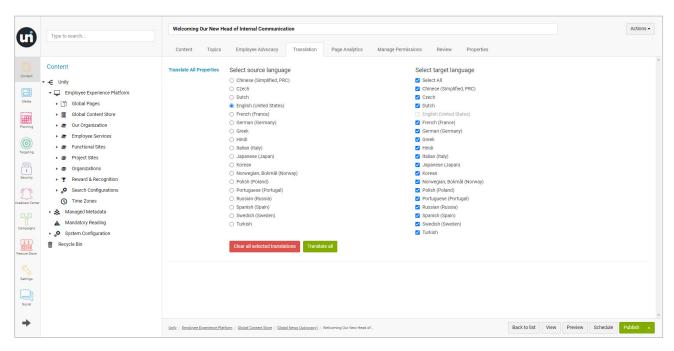


Adding external links and suggested text to help employees share good news.

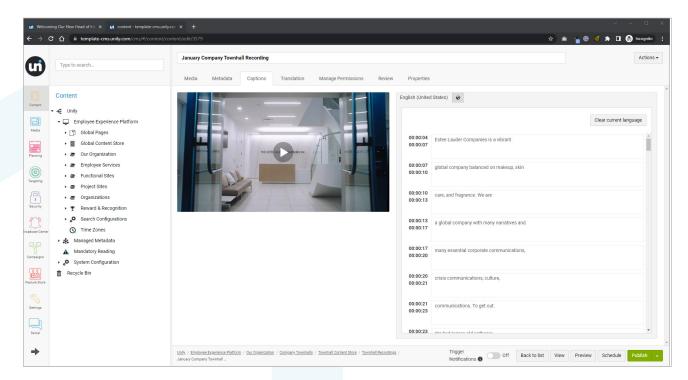


Adding translations is a simple process using the 'Translation' tab. Editors select the target languages they want, click 'Translate all' and the job is completed securely in a few seconds thanks to Microsoft Azure Cognitive Services. Editors preview the resulting translated draft for corrections and there is an option for these to be shown side-by-side.

Machine translation extends to video captions as well. Azure Cognitive Services is used to generate captions for video uploaded to the platform. It also handles draft translation, while editors can check and edit captions in all supported languages.



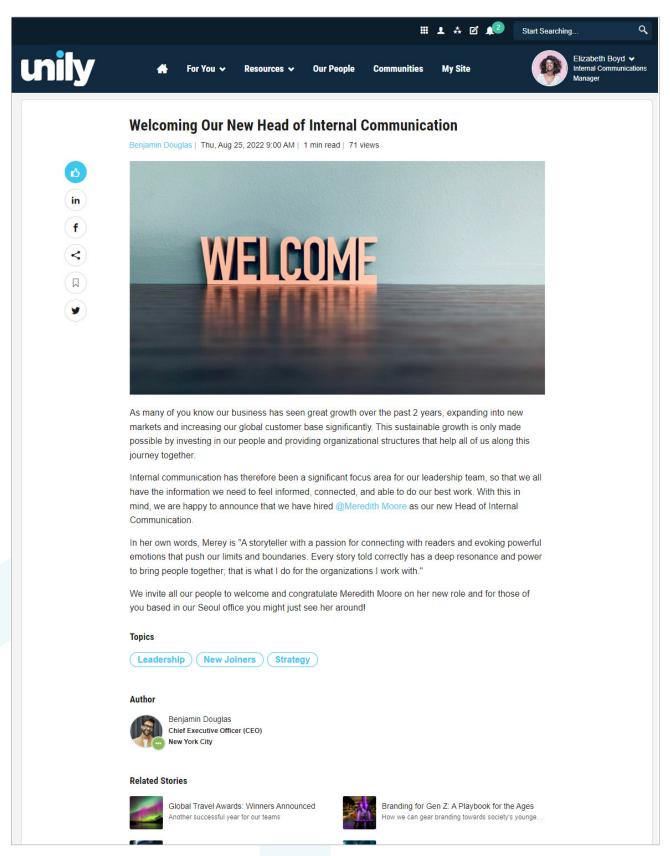
Unily's Translation feature uses Microsoft Azure Cognitive Services in the background to translate content into selected languages quickly and securely.



Videos are automatically captioned and translated into supported languages.



Finally, the editor chooses to publish the article now, send it for approval or schedule it for future publishing. An example published article is show in the screen shot below.



The published news article.

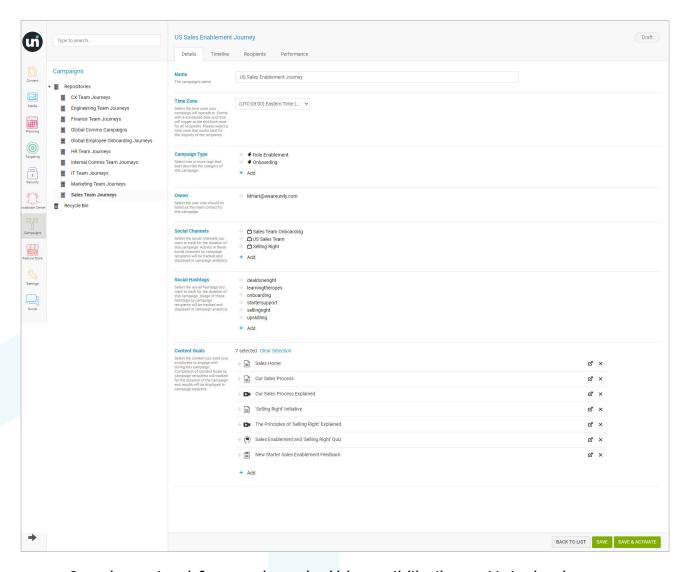


## Campaigns and engagement automation

Unily's 'Campaigns' feature brings sequential timeline-based automation to many of the platform's communication and engagement capabilities. This means that a sequence of events can be pre-programmed into the CMS and when the chosen conditions are met, they are actioned without further intervention.

Events that can be automated include branding (theme) changes, content publishing / unpublishing, social posts, email broadcasts and notifications (intranet, app, email, MS Teams etc), along with targeting settings to reach desired audiences.

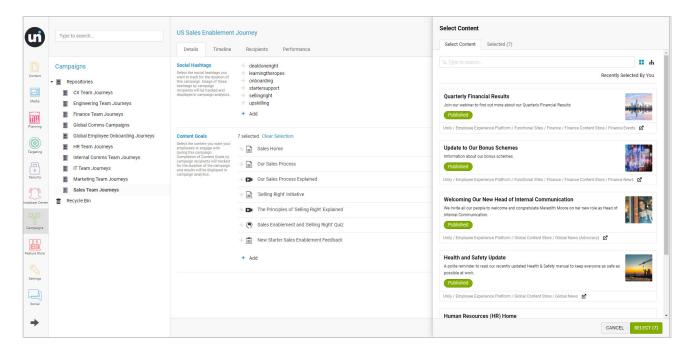
Central to campaigns is the ability to define goals such as the use of certain social channels and hashtags, and actions like reading a piece of content, or completing a form. Goals are defined via a simple interface that allows the campaign creator to pick the social channels and hashtags they want to monitor from lists of options. Content goals are defined with another simple selection process enabling the campaign creator to choose content from the CMS. This takes advantage of Unily's 'recent content' feature to help speed up the process



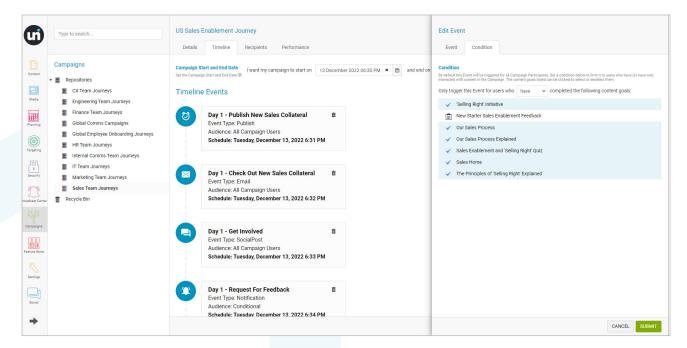
Campaign creators define campaign goals which are activities they want to track and measure.



Once goals have been defined, the campaign creator can go on and schedule activities and events in the CMS that will drive the campaign and encourage employees to do the desired actions. Event activities include sending an email, posting to social, sending a notification etc. These events are sequenced on a date-driven timeline but can also be made conditional upon previous activities having been completed, so people do not get overwhelmed.



Adding content goals is made easier with Unily's 'recent content' picker.

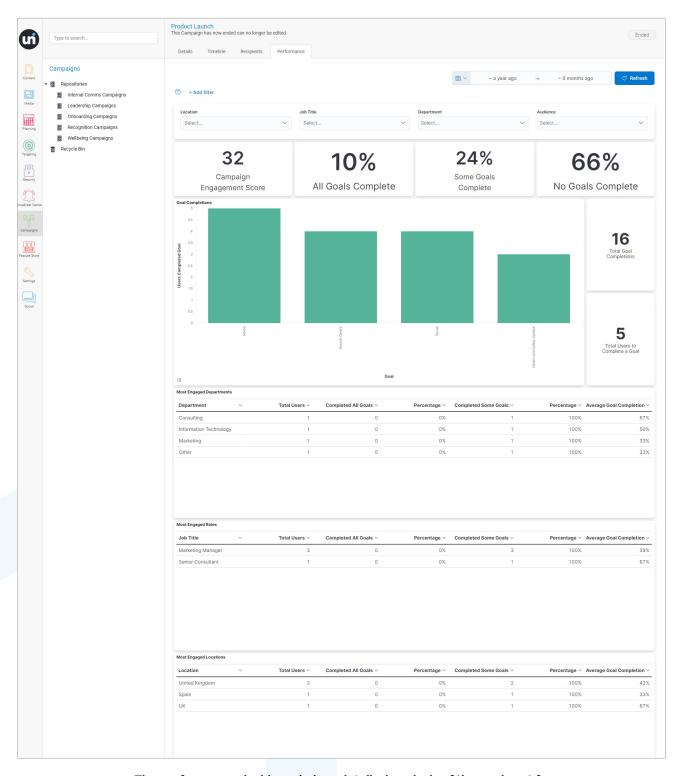


Content, social and publishing activities can be sequenced via the timeline. Events can be made conditional upon previous actions being completed.



After the campaign has begun, the campaigns centre gives a full breakdown of the goals set, how many people completed each individual goal and an overall campaign engagement score. This is tracked and analysed by profile information such as department, role etc. along with the devices used to complete the goals.

Overall, this is a highly effective feature that we can see will be very useful in managing and repeating complex campaigns and messaging.



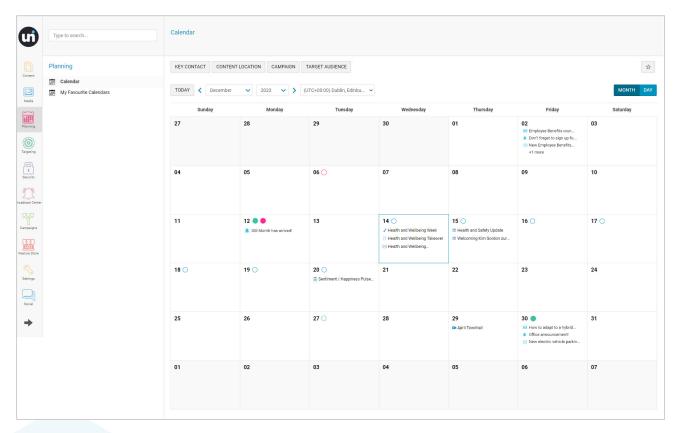
The performance dashboard gives detailed analysis of the goals set for the campaign and how effectively they have been met.



# Communication planning

Unily has a richly featured communication planning calendar that gives detailed oversight of all scheduled activities in the CMS. This includes emails, notification sends, news article publishing and home page takeovers, as well as the Campaigns feature.

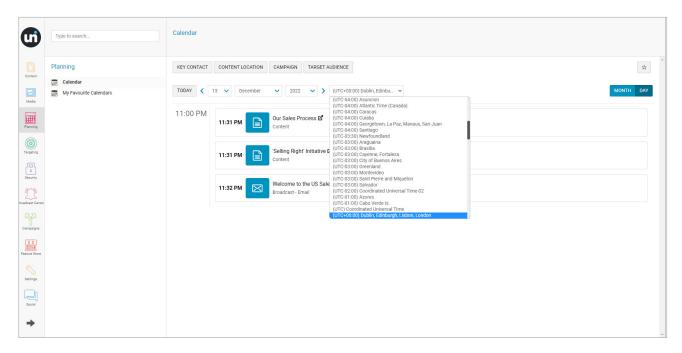
Icons show the type of activity (email, news article etc.) along with a description, such as 'Health and Safety update'. Clicking on the item takes publishers to the content in the CMS. Communications that are part of a campaign are colour coded and the calendar shows the campaign duration and name.



The calendar shows all scheduled activity in the Unily CMS.



The calendar is permission trimmed for the individual, simplifying things for local communications teams, while giving a comprehensive view of activity for roles with global permissions. We can imagine this global view being pretty busy in large organisations so the addition of filters to simplify things is welcome. Activities can be filtered by key contact (author), site, campaign, and target audience. A nice touch is that filters can be combined and then saved as a named favourite for re-use later. Month and day views are included with the latter including a handy time zone conversion dropdown to help global teams. Overall, this is a well-thought-out and executed feature.



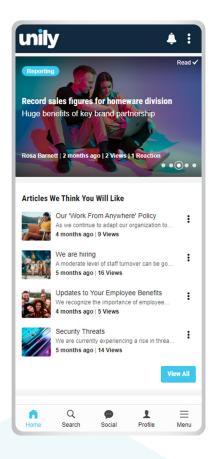
Filters help drill down to specific activity across multiple time zones.

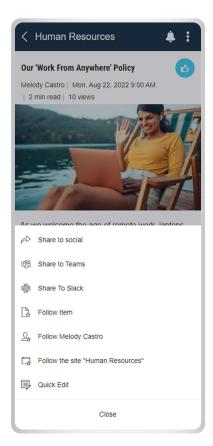


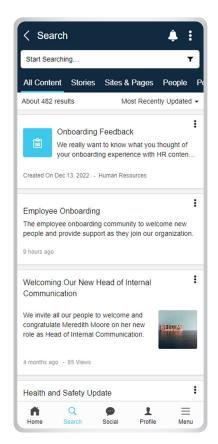
# Useful and attractive templates

One of Unily's longstanding strengths is that it looks great, particularly when compared with standard SharePoint sites. Even relatively busy Unily pages somehow manage to retain a sense of simplicity, thanks to clean layouts and clear separation between page elements. Buttons for functionality and interaction are clear and consistent while context menus are intuitive and quick to learn.

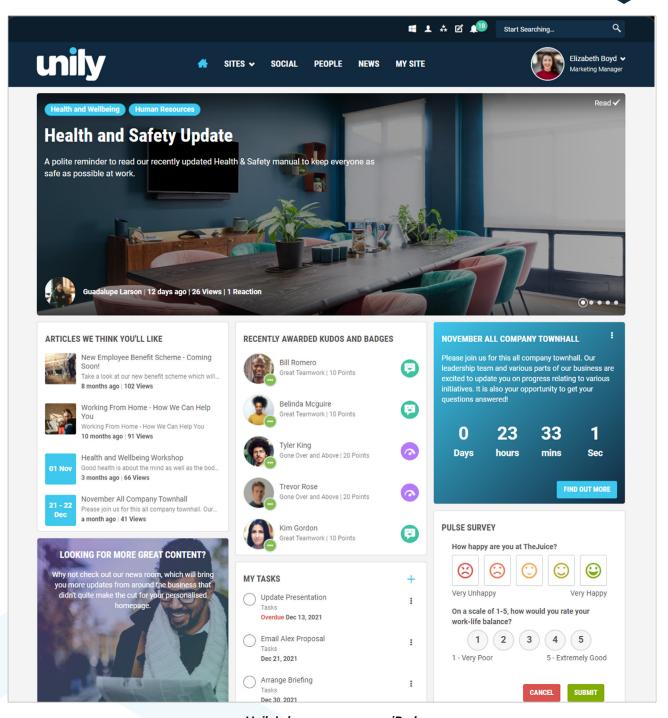
Desktop, tablet, and mobile versions of pages work well as standard but can be further optimised with device profiles and page variants that hide or show widgets depending on the device type and screen size. Please see the example screen shots below for an illustration.





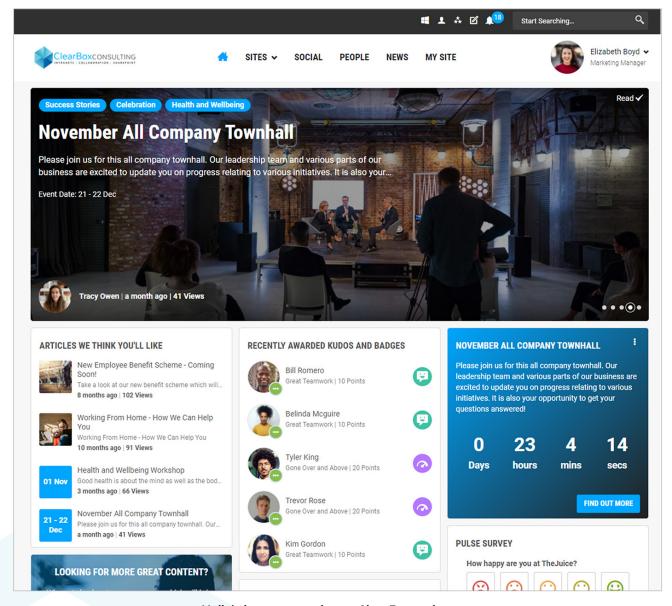


Unily on mobile app.



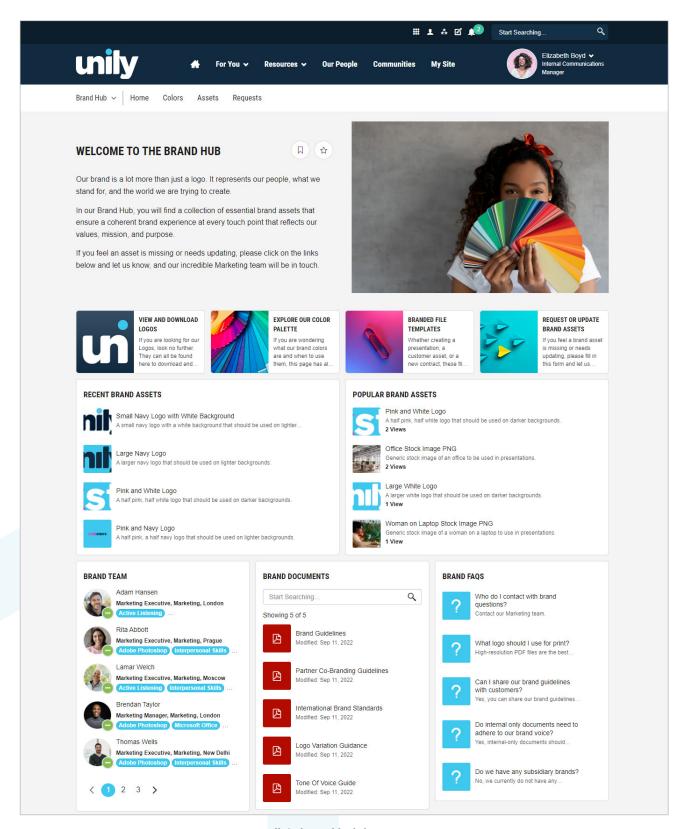
Unily's home page on an iPad.

Multi-brand organisations are also well catered for. Different branding can be applied to subsites or can be shown based on employee profile attributes, so that different groups of employees logging into the same site can see different brand treatments.



Unily's home page given a ClearBox makeover.

Unily comes with some optional site templates that can help accelerate creation of a new intranet. A 'brand hub' helps organisations manage and use brand assets on the intranet and elsewhere. The brand hub is a ready-made site within Unily with pages for things like brand colours, FAQs, templates, and an asset request form.

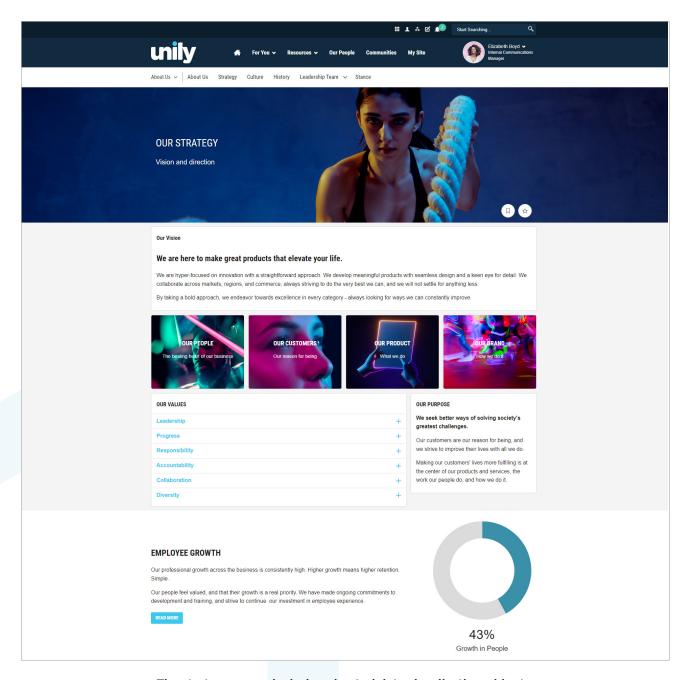


Unily's brand hub home page.



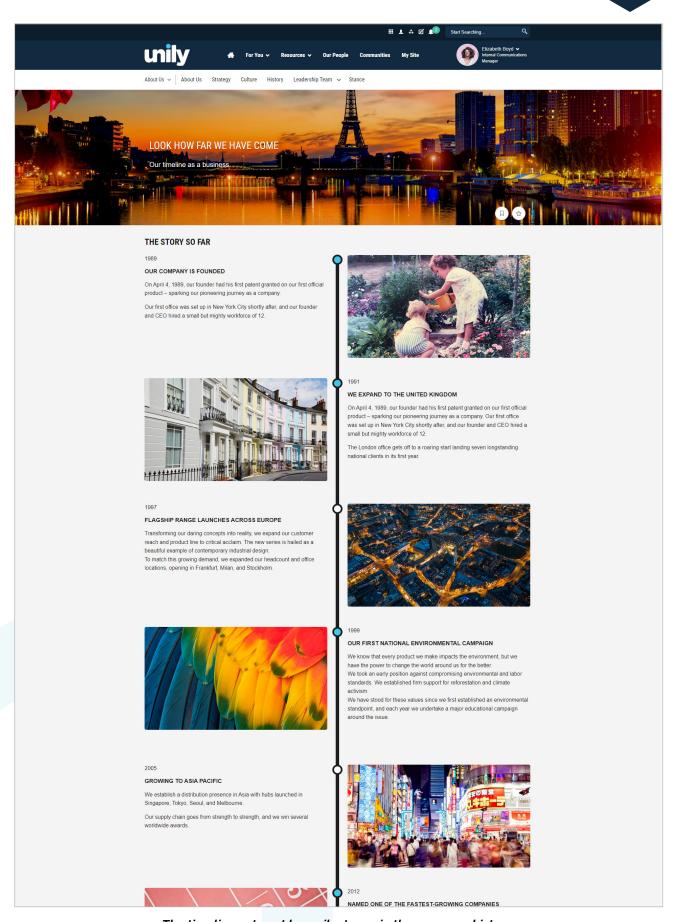
The brand hub also stores assets such as logos, stock imagery, PowerPoint templates and font files in a library that enables search and preview, like a lightweight digital asset management system. As you would expect, assets stored in this library can then be picked for use on Unily pages.

Every intranet needs an 'about us' section to help orient new and old employees on what is important for the company, where it is going and how well it's doing. Unily provides an attractive site template that combines a number of useful widgets to do exactly that. The about us home page provides key facts about the company while the strategy page has some nice data visualisation widgets that help bring the numbers to life. The history page is also worth mentioning, laying out information on a timeline that helps to show important milestones in the company's development. You can see this widget being used to plot out future milestones for a strategic project as well.



The strategy pages include animated data visualisation widgets.





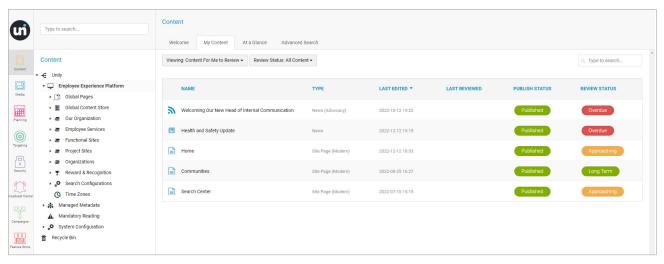
The timeline sets out key milestones in the company history.



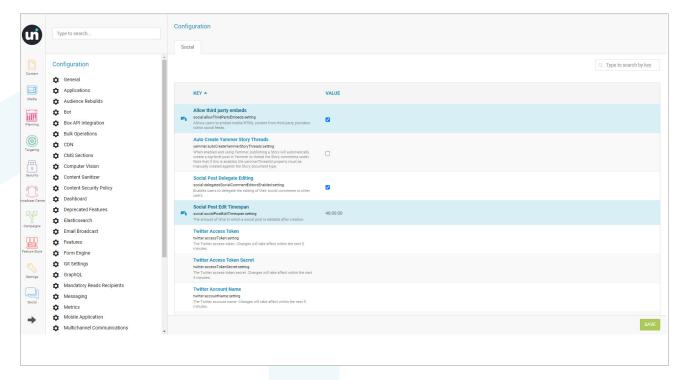
## Powerful administration features

The attention to design and clarity of interface extends backstage too. Unily has among the most powerful admin interfaces we've seen. Considering how much can be changed and controlled through this interface, functions are clearly separated in a hierarchy with the ability to drill-down through layers of options and details. If you can't remember exactly which heading an option is under, search will help you find it.

Most of the features of the product can be enabled / disabled and configured by the client themselves with no need to involve Unily. This is true for the feature store as well, which gives access to optional features such as integrations with third-party products like ServiceNow. There is a near-consumer-grade experience to installing and updating features, that non-technical people will feel more comfortable with and comprehensive online documentation as a backup.

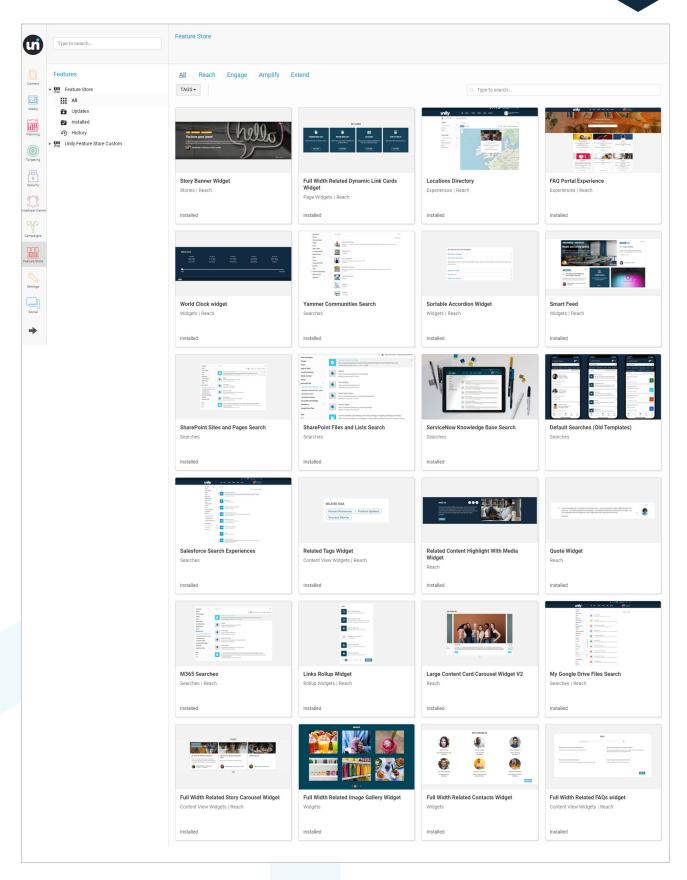


Unily's admin interface organises functions logically while 'My Content' gives editors a useful overview.



The admin interface gives clients granular control over features and configuration.





The feature store allows clients to add and update optional product features.



# THINGS TO BEAR IN MIND

Unily is positioned as a broad employee engagement platform and there are many aspects it does really well, although there are some opportunities for improvement. For example, Social is perfectly acceptable as a collaboration tool but discussion threads are missing titles and adding images to posts is fiddly.

Analytics in Unily is due a significant upgrade in 2023 and the Campaigns feature shows what can be achieved with focused measurement of activity related to specific goals. We'd like to see this expanded to cover things like defined user journey mapping, and the ability to track awareness and engagement with topics outside the context of a campaign. Currently this sort of tracking can only be done with additional professional services.

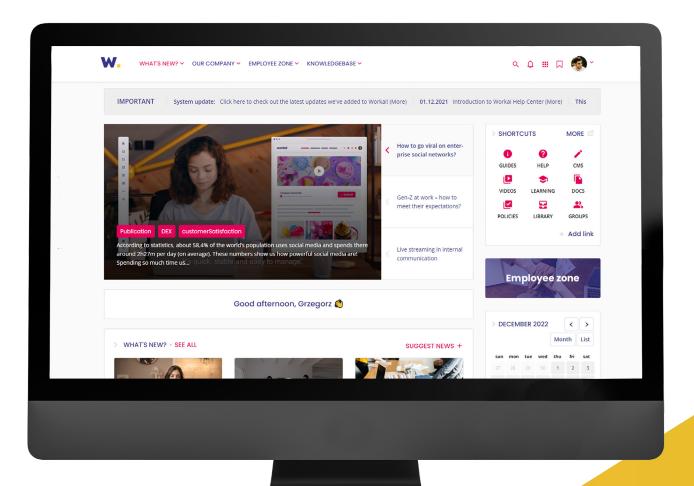
Microsoft integration is important for many organisations and Unily certainly takes advantage of services in the ecosystem such as Azure Cognitive Services and Graph. However, Teams integration is fairly lightweight and we are unlikely to see much development around the Viva suite in the near future either.

# Why choose this product

Unily will appeal to organisations looking for a well-integrated employee engagement and experience hub with a top-tier interface on both desktop and mobile devices. Its communication planning and campaign automation capabilities are excellent, along with a powerful administration interface. Unily will work best in medium to large organisations with complex communication needs that can take advantage of the wide range of capabilities it brings and get maximum value from their investment.



# workai.



# Our view in one tweet

Workai from @workaicom is a communication, engagement and knowledge focused intranet with an excellent approach to content creation.



# Workai owned by Workai

Workai was set up in 2016 and is based in Poland. The product is very easy to use for admins and content publishers, providing some excellent intuitive tools to help with site administration, page configuration and especially content editing. Branding options are simple but effective and the product has a good user experience overall. Content targeting is relatively sophisticated, showing different content blocks within pages, depending on the audience. A capable mobile app is an option at extra cost that extends use cases away from the office and includes an offline reading capability. Analytics provision is also an area of strength with some unusually detailed insights into employee journeys and behaviour on specific pages.

Workai is not as comprehensive in its standard feature-set as some other products in this report, however. Third-party digital workplace integrations are less well provided for, although there are some integrations with Microsoft applications such as SharePoint and

Teams. Content publishing is missing multilingual support, while admin role configuration is more limited than we would expect, too.

A number of features are optional modules at extra cost (not provided for this review), which may mean savings for those that don't need them, but this could impact on user experience. For example, the community and engagement tool, Connections, provides a competent employee social network but it is really a completely separate product, much like Yammer is separate from SharePoint.

Overall, Workai would suit small to medium-sized organisations looking for an easy-to-use communication and engagement focused intranet, particularly those that want to be able to administer as much of the platform as possible themselves. They have some large customers, but it is one of the pricier offerings for organisations of 20,000 employees and over, while smaller organisations will likely see it as better value.

# Summary table of scenario scores

## NO. SCENARIO/SCORE 1 User experience and visual appeal 2 Mobile and frontline support Internal communication 3 Community and engagement 4 5 Information finding and knowledge management 6 Admin experience and governance Analytics 7 8 Digital workplace integrations Microsoft 365 integration 10 Wildcard

## **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price per user per month, One-off payment, One-off payment and ongoing maintenance fee.

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, frontline users, multi-year commitments, customers only pay for active users, businesses over 20,000 users, volume discount: 50% for 1000+ users. Price includes: Project workshops, training for admins, training for end users, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, hosting, onboarding user data, consulting services.

# Key benefits

- The content editing experience is excellent, combining easy to use tools with standardised formatting to ensure content looks consistently good.
- Administration facilities are built with non-technical users in mind; most aspects of the product can be configured using plain-language based menus.
- There is a comprehensive suite of analytics that does the basics well but also provides some very detailed insight into employee journeys and behaviour, something not typically found in intranet products.
- Search benefits from clearly laid out result pages backed up by simple-to-use administration tools and helpful insight from analytics.

# Improvements and considerations

- Workai is not as comprehensive in its feature-set as some other products, with no multilingual support and limited admin role configuration options, for example.
- Digital workplace integrations are very limited, particularly with non-Microsoft services.
- Many features (e.g. Knowledge, Mobile, Connections) are optional modules at extra cost, although we imagine most organisations will need them.
- For organisations over 20,000 employees, Workai is one of the more costly offerings included in this report.



# **Product type**



# **Branding opportunities**

All branding, complex options

# Target businesses



**SMALL** less than 1,000 people



MEDIUM

1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

# Base systems



standalone

Fully Reg



Requires SharePoint



Optionally works with SharePoint



Other

# **Sectors**





Energy and utilities



Media and internet



Retail



Transport & Logistics

# You may also be interested in...









# **COMPANY AND PRODUCT**

# Company details



Company Workai



Company founded 2016



Company locations

Bialystok, Poland



ISO 27001 certified

Workai says that this is "in progress".



Typical client size 1,000-3,000 employees



Largest deployment so far

40,000 employees across Germany and Austria



Partner locations

Germany, Netherlands



## Customers

Clients include: T-Mobile, CANAL+, DVAG, PKO BP, Żabka, BGK, PGNiG, RAS, PKP Energetyka, ROHLIG SUUS

# Product and technical details

Name of product	Workai
Product launched	2016
Current version	1.2301.0
Accessibility	Alt text is in use for images, keyboards can be used for navigation.



## Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services

Vendorhosted Microsoft 365 tenant

Other

## **Data residency**

Standard SaaS deployments are EU / US but dedicated deployments can be configured to client needs.

## Client data encrypted

In transit only

In transit and at rest

At rest only

## **Authentication supported**

<b>Azure Active</b>
Directory

ADFS

Open ID

Oauth

**G** Suite

Other\*

## Search technology

Apache Lucene/ Solr

Apache Lucene/ Elastic

Microsoft

Vendor's own

Other\*

## Document library sources integrated

Box

Dropbox

Google Drive

**SharePoint** 

OneDrive

Other\*

## SharePoint/0365 versions supported (if applicable)

SP Server 20	16

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

## Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other



<sup>\*</sup>Custom SSO

<sup>\*</sup> Azure Cognitive Search

<sup>\*</sup>Workai's own Assets Management based on Azure Blob Storage

## **Reverse-out options**

For subscriptions the client can download all the data. For bespoke contracts the system still works, but it's not supported.

## Languages supported

Polish, English, German, French, Spanish, Dutch

### Machine translation

Not via the product - it's whatever the browser/base system does.

## Right to left script

No

# Set-up and support

## Set-up process for new clients

There is a setup wizard to connect to company resources. This is followed by a 1-month onboarding project, depending on the client's needs. After that, Workai provide support and SLA services.

## Product updates

Monthly

## Product update process

For SaaS versions all customers receive updates at the same time. For dedicated deployments, customers decide the timing and features of the updates themselves.

## Technical support

Partners and direct support. Support portal, chat, email, phone. Office hours Mon-Fri.

## User community

None



## In their own words

Workai says: "Workai is one unified employee experience platform that securely connects internal communications, knowledge management, social engagement, workflows and more. Workai helps companies personalize communications, reach and engage employees across multiple channels and measure results in real time."

# Their view of the marketplace

Workai says: "The current state of the Employee Experience Platforms market shows that there is a need for solutions that allow IC and HR managers to connect and engage all employees from one place, but through multiple channels. Similar to the marketing approach, with all the familiar processes: communication automation, analytics, rich media, a/b testing, customer journeys, personas and more. In this way, the internal communications team can use all available tools to engage employees at every level and in every location, personalizing communications accordingly and choosing the right channel in a multi-level approach."

## Voice of the customer

Customers complimented Workai for its simplicity and ease of use from the implementation onwards, both for employees and for people running the intranet. One respondent explained Workai is, "very easy to use, even for non-tech employees". While another mentioned the "easy administration panel" and "a lot of widgets that can be easily changed". Another agreed that it has, "a wide range of functions so that the intranet can be tailored to the needs of the audience". One customer summed up their experience, "after a year of cooperation, we are still satisfied with our choice".

Suggestions for changes and improvement are a bit more diverse with customers generally happy with things as they are. One said they would like, "new functionalities like the option of auctions and emoticons". While another was more focused asking for, "more features based on automation e.g. automatic retrieval of posts from social media". A third customer was looking for optional extras to be cheaper explaining that they wanted the mobile app but that it was "too expensive for us".

Customers were unanimous in their praise for the vendor citing "great cooperation", a "helpful team" and a responsive service with one saying the "helpdesk responds promptly" and another praising Workai's "fast reaction times". As well as speed, customers appreciated Workai's competence with one stating "technical support is highly professional and efficient", while another shared "what I also appreciate is the knowledge and best practice sharing". One seasoned professional concluded by describing Workai as, "the best intranet vendor I have ever had in my more than 10 years of internal communication experience"



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## Employee zone







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# **REVIEW**

## 1. User experience and visual appeal

SCORE 3.5

Workai has an attractive and contemporary user interface that employees are likely to feel comfortable with quickly. The user experience is consistent across many of the features, although the social component, 'Connections', is a little different on the desktop, being in essence a separate product with its own page layouts. Please see Scenario 4 for more on this.

Navigation follows a typical pattern of a top menu bar with icons for search, notifications, app launcher, favourites, and employee profile settings. The global navigation is text-only and can be configured as a mega menu, although Workai says that most customers don't do this. Moving deeper into the site there is an optional vertical site navigation on the left to make it easier to find information in context and a breadcrumb helps with orientation. A user-configurable 'useful links' widget can be added to any page.

The notifications menu drops down and shows recent comments and replies to social posts along with updates relating to followed pages and tags. Third-party notifications can be included via API calls, but we did not see this in action. There is a link to the notification centre where employees can see more notifications and make changes to what they follow.

Branding options are fairly simple; clients can change the site title, logo, icon and colour palette. Multi-brand organisations are handled via multiple tenants with a separate intranet instance for each. Content can be synchronised periodically across sites so that common information, such as global content, can be shared, but this is not as straightforward to manage as some other solutions.

# 2. Mobile and frontline support



Workai provides responsive web and native app access for mobile devices, although the app is not included in the price provided for this report. The app provides the benefit of push notifications and easier, log-in free access once set up. Enterprise customers with MDM platforms such as Microsoft Intune can white label the app, but all customers can download the standard app from public app stores. Employees log-in with their company details, which are

typically Microsoft 365, and stay logged in until they log-out. There is no biometric authentication support.

The mobile experience is contemporary and familiar, following common patterns for navigation and interaction with search, notification and profile icons at the top and the main navigation at the bottom. Navigation is client configurable and items (home, feed, tasks, contacts, links, posts) can be enabled or disabled for mobile users. A really nice feature is that employees can choose which of these views they want to see when they open the app. There



are many features available on the mobile app, so we think admins need to give careful consideration to which they make available, in order not to overwhelm employees with too many options.

There are no dedicated features for frontline workers, such as alternative authentication methods if they do not have a company account. Workai's features do work well on mobile though, so we can see frontline employees taking advantage of things like community, tasks, and kudos.

The newsfeed pulls in the same stories that employees would see via the desktop and it supports likes and comments. We particularly like that you can save articles to read offline later. Search includes all the content accessible via the desktop and has filters for content types (pages, documents, people etc.) which is good to see.

# 3. Internal communication

SCORE

The publishing experience for news and static content is a joy to use, please see Scenario 10 and the Highlights for more details. There is a range of flexible templates for stories and reference pages; images and video are easily added and benefit from some nice layout options.

Content targeting is relatively sophisticated, employing some complementary mechanisms. At a page level, employees see relevant content based on metadata tags which they subscribe to. These subscriptions are a mixture of optional and mandatory, based on the employee profile. Content can be further targeted within a page, where it is possible to show or hide individual blocks of content (text, images, videos etc.), based on the audience. This ability is impressive and enables very granular personalisation of page content. The only slight disappointment with targeting is that audience groups are currently directly linked to those in Active Directory; you can't build dynamic, rule-based audiences in Workai.

Publishing management support includes future publishing and expiry dates along with role-based workflow. An 'editor' role can create content for a particular area but only a 'publisher' can publish it to the intranet. Content created by editors go into the publisher's queue for approval. Sadly, there is no publishing calendar or similar.

On the home page there is a 'news rotator' that cycles through up to four pieces of content. This improves on the usability of a standard carousel as all stories remain visible while the promotional image and text overlay change. News lists show the most recent and pinned stories in a particular category, for example global news, while 'Recommended for you' shows personalised stories based on the employee's tag subscriptions. A 'highlighted' option on published news articles makes them stand out further in these lists.

Urgent communications are supported in two ways. A 'messages bar' can be added to the top of any page, including the home page. This displays prominently and can link to further information. Future publishing, expiry and audience targeting are supported. Even harder to miss is a home page pop up that takes over the screen and must be dismissed before continuing.

Workai has templates for email newsletters that use content from the intranet. Newsletters can be purpose built in the CMS and sent by email, or the system can automatically aggregate content based on rules and regularly send it to a defined target audience.



# 4. Community and engagement

SCORE

Workai's main community features are in an optional component called Connections, which has not been included in our price comparison. The relationship between Connections and Workai Intranet is a bit like the relationship between Yammer and SharePoint; they are separate products that share some common services, like authentication and profile information, yet complement each other with their capabilities. It is possible

to show content from Connections in Workai Intranet, although we did not see this in action, but there is no 'Share to Connections' option on the intranet. The two components can be used entirely independently from one another; in fact Workai says that some customers use Connections as their 'intranet'.

Connections is based around employee communities, for example location, interests, projects, or department. These communities are open or private, and mandatory or optional. Community owners have moderation capabilities and the option to approve new members. The Connections home page timeline aggregates updates from the employees' communities; employees post to the timeline with short updates, events, colleague kudos, questions, and polls. Posts support @mentions, hashtags, and uploads, and are displayed in one or more communities the employee chooses. Longer form articles are supported with blogs, although these do not include the powerful text styling of the publishing platform. Employees can like and reply to all post types but there are no other reaction types yet. On Workai Intranet, published content has its own comment, 'like', rating and share options that is not a part of Connections. Again, there are no other reaction types. Publishers have the option to pre- or post-moderate comments.

Connections includes polls and awarding kudos to colleagues, which are simple to set up. Polls are also available on Workai Intranet. Employees create a poll with a title, a brief description and configure response options including text, whether it is single choice or multiple choice and a closing date if needed. Colleagues vote on the poll and see the results in real time. Awarding kudos is a simple process of choosing the beneficiary and choosing from a selection of award topics. Awards are configurable so they tie in with company values, for example. At the moment only one colleague can be recognised at a time, but it would be nice to expand this to multiple colleagues or whole teams.

Workai Forms is another optional extra module not included in the price comparison, which provides more detailed survey and data capture capabilities. Admins can build forms with a drag-and-drop interface and Workai says Power Automate can be used to workflow responses, although we did not see this in action.



# 5. Information finding and knowledge management

SCORE 2.5+

Search is available via the top bar on any page and shows results from the intranet and knowledge management module. Search results for content (but not people) appear in a drop-down as you type. Hitting 'Enter' takes you to the full search where results for content are shown along with people in a separate group of results. Content results are nicely presented with thumbnail images, metadata and truncated page text. Results can be filtered

by tags, date and author. Results for documents can be filtered by the document type file extension (.docx, .pdf etc.). Results from Connections are not included in the desktop experience and it does not have its own free text search facility.

Some search behaviour is configurable by admins but things like stemming and fuzzy matching are handled as standard by the Azure Cognitive Search service that powers it. The search settings page enables configuration of elements such as content types to include, how they are shown, and filtering options. There is an optional feedback form that sends responses to admins; Workai says this also improves the algorithm. Promoted search results are set up by admins via a simple process that links keywords with content in the CMS. Content owners have the option of adding keywords to their content that helps to push them up in rankings, too.

People results are included in the main search and there is an 'address book' that can be browsed via an A-Z index or searched. Results can be filtered and searched on facets such as location, business unit etc. People results are clearly presented with main contact information and useful buttons to start a chat or call via Teams. Clicking on a person brings up a more detailed profile that includes knowledge and expertise. Some of these elements are presented to look like tags but sadly they do not search for other employees with these attributes when clicked. There is no people-centric organisation chart generated from profile data.

Knowledge management is another optional Workai module not included in the price provided. This is fully integrated with the main intranet and provides some specific page templates ('content types' in Workai) for helping to organise knowledge, including FAQs, glossaries, documents and widgets for aggregating content based on metadata tags. As with publishing, this is well executed and a useful feature.

# 6. Admin experience and governance

SCORE 2.5

Workai is designed to be simple for clients to administer themselves with a minimum of technical knowledge, please see the Highlights for details. We think they have achieved this well but at the cost of some compromises around areas such as admin role granularity and content life cycle management.

To start, smaller organisations up to 500 employees can self-provision their intranet via a walkthrough wizard and have it deployed in a matter of minutes.

Larger organisations benefit from a formal onboarding process to define the information architecture, content types, roles etc.

A single 'administration panel' enables admins to configure every aspect of the product from branding through to integrations. Administration roles are limited, with a global admin, business admin (who can change some admin features), along with publisher and editor roles described in Scenario 3. These roles are applied at global and local levels, so permissions can be different



for different parts of the site.

Home page administration is straightforward and powerful, using an intuitive drag-and-drop editing interface to add, remove and move widgets around. All widgets are configurable to be shown or hidden depending on the audience, providing a flexible and targeted approach to the design. Global navigation management is a similarly intuitive, drag-and-drop experience. Admins configure which templates or 'content types' are available in different parts of the intranet to help with governance.

There is some support for content life cycle management although features are not as comprehensive as some other products. Published pages have publishing and expiry dates, and admins (not publishers or editors) have an overview of content status for the whole site, along with search and filter to make this list manageable. Individual pages have a 'reminder' feature that creates a recurring task for the owner to check it periodically, but this is not a central control as such.

The Workai CMS interface has been translated into English, French, German, Polish and Spanish. Content can be published in any single language, but multilingual content (i.e. multilanguage versions of the same page) on one tenant is not available yet.

# 7. Analytics



Workai Analytics provides a comprehensive suite of dashboards that will meet many typical needs, although admins can also configure their own reports. What is provided as standard is well-executed, giving an overview of usage combined with considerable detail on employee behaviour and journeys down to the individual (albeit anonymised) employee level. Please see the Highlights for more details.

Overall traffic is covered in a series of charts and tables showing popular times and days of the week, visit duration etc. Technical details such as device type, browser, screen resolution and page load times are also included. The analytics show what's happening on the intranet in real time, including a map of current user locations, although this relies on IP lookup which can be unreliable when company VPNs are used.

One of Workai analytics' more powerful features is the creation of anonymised user profiles to track individual behaviour. This enables admins to follow individuals or groups (segments) of employees as they go through the site, to help identify common paths and obstacles. There is also a user flow view that visually maps the user journey before and after visiting a particular page. Heatmaps provide detailed analysis of employee behaviour such as mouse movements and clicks on specific pages.

Search analytics is part of the suite and covers top keywords, failed searches and next pages visited. Search term usage is shown over time, helping to identify trends, and clicking on the term shows the detailed journey that employees make when doing the search.

Workai says that Analytics covers Connections traffic, but we did not see this in action. Connections does have its own reporting that lists posts that have the most comments or the most likes. There is no mandatory reads capability so no associated reporting.



# 8. Digital workplace integrations



There are limited non-Microsoft third-party integration options. Workai has a public, documented API that is accessible to third-party applications for notifications, publish content or to create tasks, but this would require development effort from Workai professional services or in-house.

Familiar iframe 'embed' widgets are available to admins, which are helpful but not as sophisticated as other solutions we've seen. There are dedicated embed widgets for social platforms like Facebook, Twitter and Instagram, however.

There is no integration with third-party collaboration tools or document libraries (e.g. Google Drive or Dropbox), and no federated search capabilities.

# 9. Microsoft 365 integration

SCORE 1+

Workai integrates with some Microsoft services in addition to leveraging Active Directory for authentication. SharePoint can be connected to Workai and used as a source and repository for files and documents. Workai has widgets to embed SharePoint document libraries, lists and calendars in pages.

Teams also benefits from some optional integrations at extra cost, which is in addition to the ability to launch a chat or call from the employee directory.

There is a Workai Teams app that enables employees to browse the whole intranet within Teams. Workai notifications also get shown in the Teams activity area. Sadly, it is not possible to see information from Teams within Workai.

There are no integrations with Yammer or Viva Connections.

Workai's search (powered by Azure Cognitive Search) can be connected to SharePoint although we did not see this in operation.

Finally, Workai's events integrate with Outlook calendar so when employees sign up for an event or are invited to an event, they get an Outlook invitation.



# 10. Wildcard

score 3.5

Workai's wildcard is the content editor experience introduced in Scenario 3. It is certainly one of the most mature features of the product; Workai created the editor around six years ago with three content types and 20 blocks, and it has now grown to 60 content types and around 200 blocks. Taking its inspiration from the best of the web publishing tools like Medium, 6 years ago it would have been revolutionary on an intranet and is still only equalled in its execution

by one or two other vendors in this report.

We really like the creative approach to dummy text that uses confectionery rather than lorem ipsum, it's a small detail but is indicative of Workai's fresh approach to content management. Another good feature is the restricted fonts and colours to enforce consistency; there are plenty of layout options, but your copy will always look good and be on brand. This is especially beneficial in larger organisations with a federated publishing model where local authors can sometimes get overly creative with fonts and text styles. These organisations will also benefit from the minimal training authors will need to use the publishing tools.

To make the content editor even more valuable, we would like to see some granularity of controls around which content types and content blocks publishing roles have access to.

Please see the Highlights section for more on this part of the product.

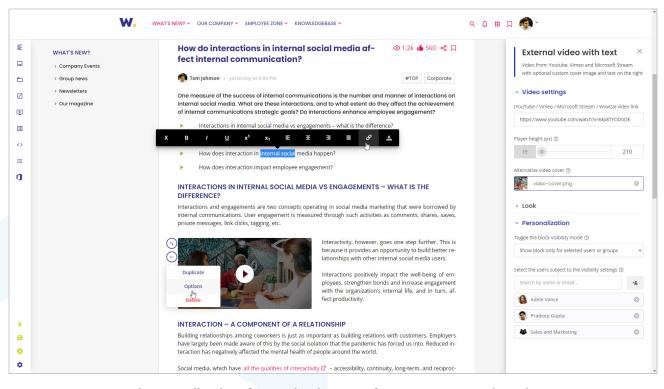


# PRODUCT HIGHLIGHTS

# **Content editor**

Workai's support for internal communication and publishing is strong, and in particular the content editor experience is outstanding. Workai comes with 60 page templates or 'content types' which are likely to meet most intranet needs. Example content types are news articles, events, FAQs, glossaries, discussions, ideas, documents, and internal recruitment. Admins see all these options and configure which are available to editors and publishers within the different areas of the intranet to help with governance.

Editors and publishers create content (for example, a news article) anywhere within the site where admins have enabled that content type. When a new page is created, it is populated with items in the template, such as an image, title, metadata, intro, and body text, for publishers to complete. The whole process of completing the template is very intuitive and easy to use. There are some nice touches like dummy text that is made up of words for confectionery, rather than the usual 'lorem ipsum'. Selecting text within a paragraph brings up a simple formatting bar that is similar to Medium or LinkedIn, in that the options are suitably limited to ensure the text looks consistent and multiple fonts are not used.

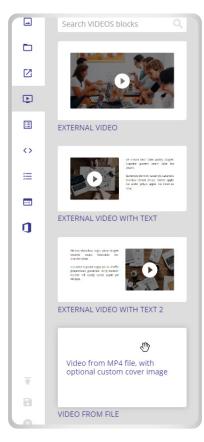


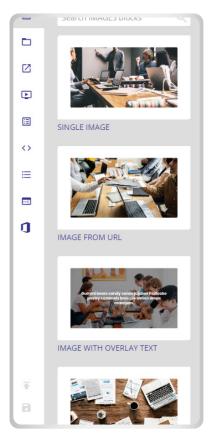
The text editor interface makes it easy to format content consistently.



New content blocks are easily dragged and dropped into place from a picker in the editor menu. The selection of around 200 layouts for text, images, video and other content types means most needs will be catered for while keeping the look consistent from page to page. Moving blocks around on the page is a similarly simple drag-and-drop experience.

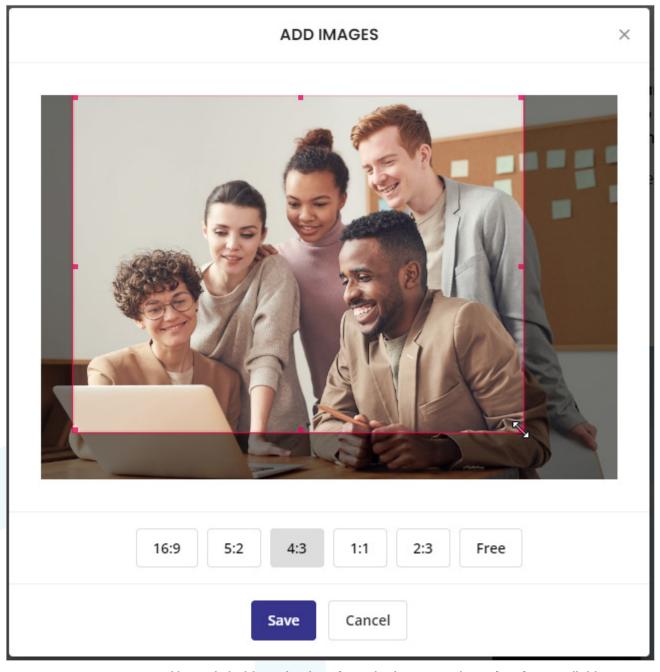






Workai comes with around 200 content blocks for text, images, video, and other content types.

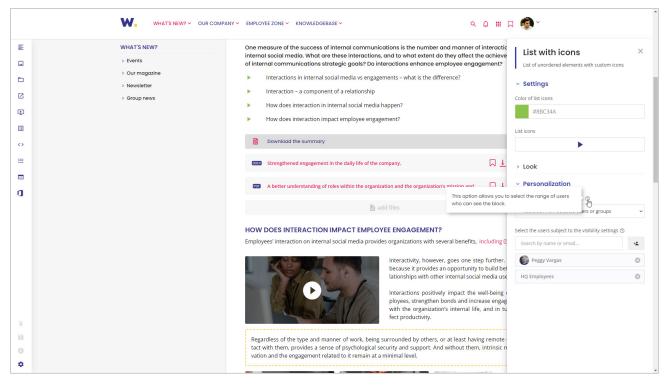
Amongst the content blocks is a good selection of layouts for images and video. Again, these are drag and dropped into place, adding the layout, dummy text and media placeholder. Whether it's part of the template or one of these blocks, images can be added to the placeholder from the desktop, brand image repository, Pexels image library, or Canva. They can be cropped within the editor and are automatically optimised for different devices. Video is uploaded to the CMS from the desktop or externally hosted via Stream, Vimeo, YouTube etc. with the appropriate URL added to a video widget. As with images, there are a selection of layouts for how the video is embedded in the page.



Images are cropped in Workai with a selection of standard aspect ratios or free form available.



Another powerful feature of the content editor is that individual content blocks can be targeted to different audiences. Targeting works by showing or hiding a content block, based on who is viewing it. This means that different versions of a page are seen by different audiences. For example, an HR policy page could have a content block that provides additional guidance only for the 'managers' audience.

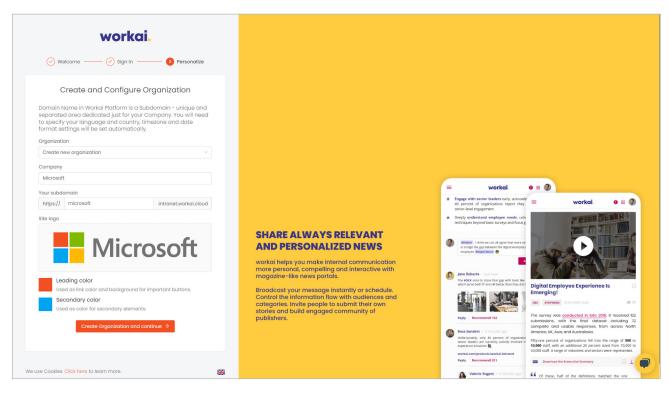


Page content can be targeted by showing or hiding different content blocks, based on the audience.



# Simple site and page administration

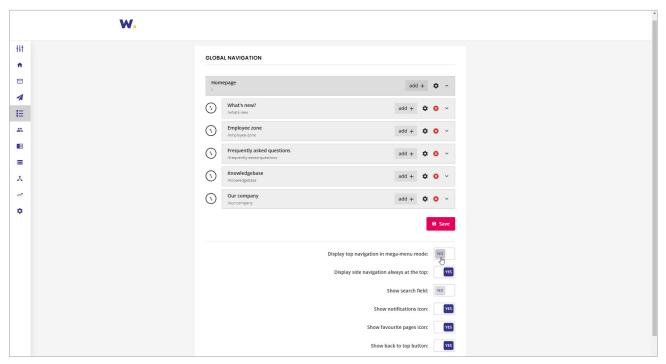
Workai's administration features are designed for use by non-technical roles and to enable customers to be as self-sufficient as possible. While there is a formal onboarding process for enterprise clients, smaller organisations up to 500 employees are supported through a self-service provisioning and configuration process with a walkthrough wizard. They also have access to a help centre with videos and tutorials to help get them started. This would enable smaller organisations to have their intranet deployed in a matter of minutes and ready for use by admins and publishers.



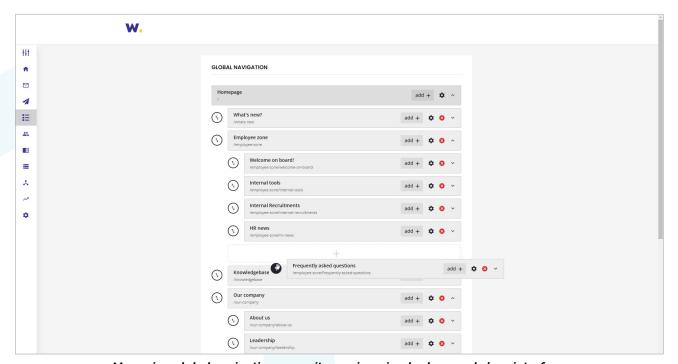
Workai's self-service provisioning wizard.



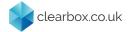
Configuring most aspects of Workai is very straightforward. Menus are well labelled and thoughtfully laid out with options grouped logically. Most options are self-explanatory but there are tooltips for contextual help when something is a bit more in-depth. Configuration of the global navigation is a good example of this principle: options for what it looks like (e.g. mega menu or not) and the way it behaves are all controlled through a simple interface. Adding, removing, and structuring navigation items are similarly straightforward: menu items can be added, dragged to where they need to be in the hierarchy and then configured for which part of the site they link to, all through the same interface.



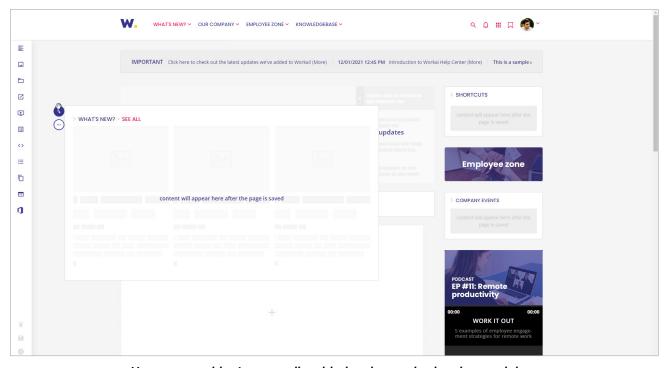
Configuring global navigation options is straightforward for non-technical admins.



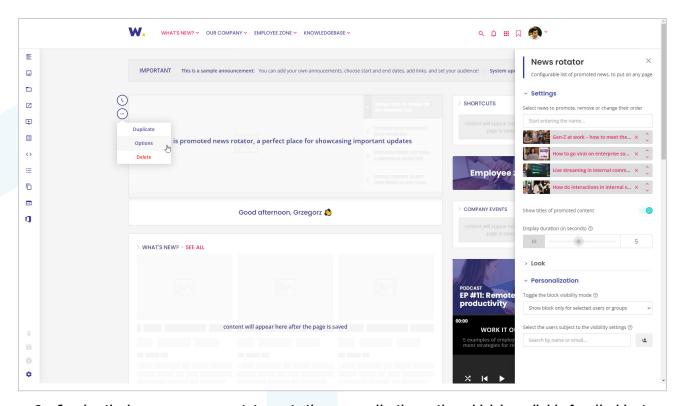
Managing global navigation menu items via a simple drag-and-drop interface.



Workai's home page is made up of widgets. These can list information from other parts of the site like news and events, or contain content in their own right. As with the content editor experience, these widgets are very easy to add, move, delete, and configure. Options to configure the widget are accessed from an ellipsis menu and this brings up the appropriate menu. For most widgets, this includes show / hide targeting ability, based on the audience, enabling the home page content to be tailored to different employee segments.



Home page widgets are easily added and moved using drag and drop.



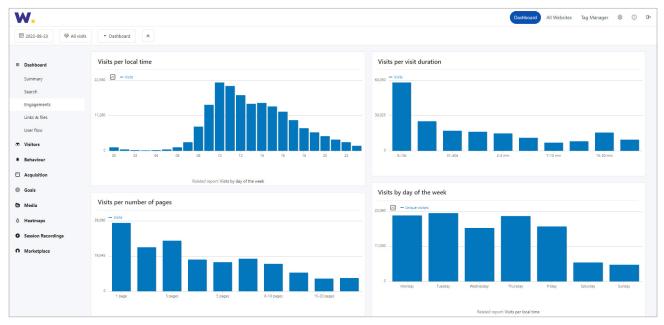
Configuring the home page news rotator, note the personalisation option which is available for all widgets.



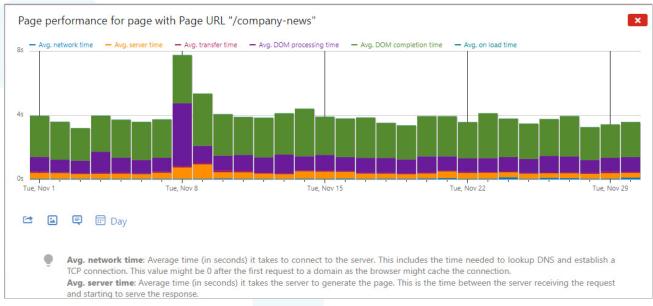
# **Analytics**

Workai includes an impressive analytics suite that will meet many typical needs for understanding intranet usage. Dashboards are client-configurable, while the pre-configured offerings go into a lot of detail for typical aspects of traffic patterns and employee journeys. Many of the standard reports include well-thought-out visual charts and representations or clearly laid-out tables. Analytics also has some innovative individual profile information that is necessarily more detailed, showing individual user journeys.

Overall traffic is shown in terms of visitor numbers with analysis over time, but these are presented in well-designed charts making the information easy to understand. Technical data is also provided, enabling admins to monitor the kind of devices and browsers that are using the site. Perhaps a little more unusually, Workai also shows page performance data, showing page load times that are more typically obtained from server monitoring tools.



Workai traffic dashboard.

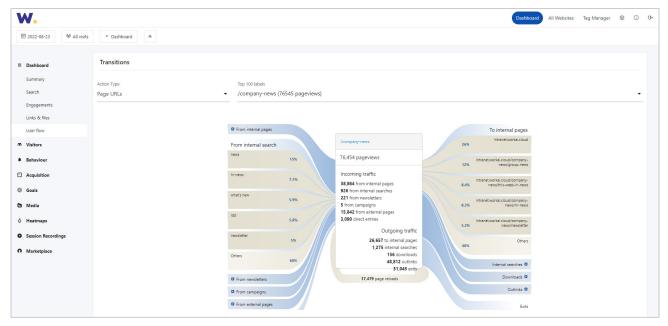


Workai page loading performance.

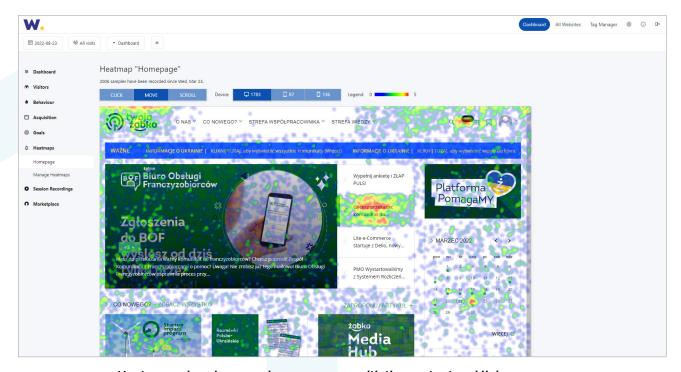


In addition to the typical analytics, Workai comes with some innovative and unusual analytics for an intranet product. These give more detailed insights into employee journeys through the site at an aggregated and individual level and behaviour on specific pages. A 'Transitions' report provides useful analysis of visits to and from a specific page presented in an attractive and easy-to-understand visualisation. This would be particularly helpful for mapping user journeys to assess the effectiveness of different channels at getting people to a specific page, and then tracking what they do afterwards such as complete a form, read a document etc.

Heatmaps are also available to help analyse behaviour on specific pages, such as the home page. This is a good way of assessing whether links on a particular part of the page are more effective than another at getting people to different parts of the site.



Transitions is ideal for analysing user journeys.



Heatmaps show how employees engage with the content and links on a page.

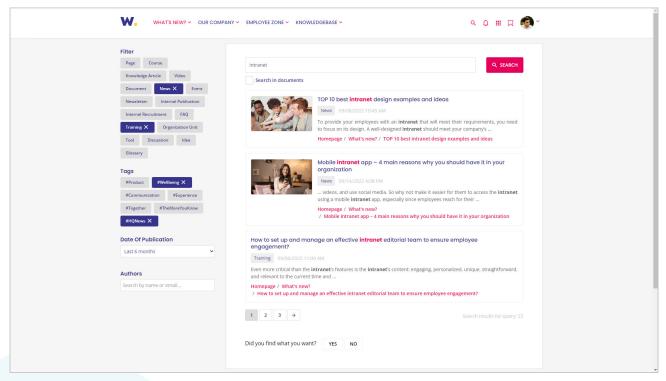


## **Content Search**

Workai includes a very capable content search facility that is backed up by some easy-to-use search management tools and useful analytics. This combination should give organisations the tools to provide a good search experience for employees.

Search is accessible from every intranet page via the top menu bar. Results appear in a drop-down as you type and refine as more terms are entered. Pressing enter moves the user to the search centre where full result listings are shown.

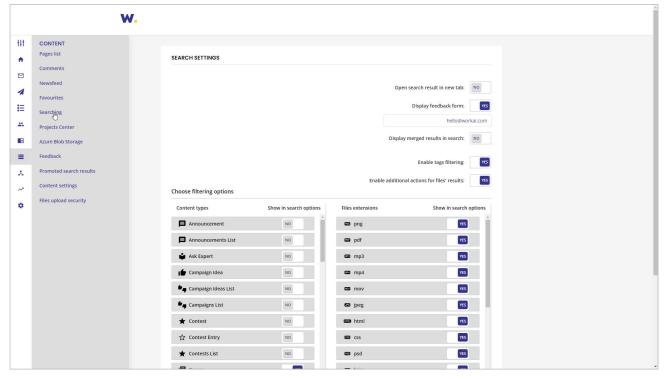
Individual results are enriched with images, metadata and truncated text from the article or document. Results are shown in blocks for different content types such as pages, documents and people. The content of non-native documents such as PDFs is indexed along with native content, which we really like. Metadata filters enable results to be further refined based on tags, dates, and authors.



Search results are presented well to make it easier to find specific information.



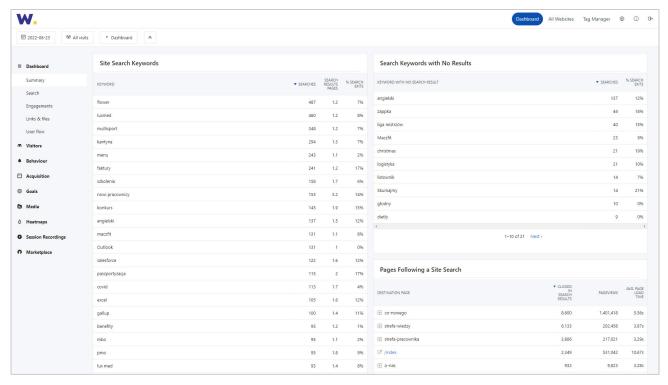
Workai provides some options for making relevant results rank higher in search. Content owners can add keywords to the page properties menu and these boost the page's ranking when search terms match these keywords. Admins can also manage promoted search results by linking one or more search terms with specific pages. These pages will then be shown at the top of the results, although it might be helpful to employees if the result listing showed this result had been specifically selected.



Search configuration options follow the typical easy-to-use settings panel.

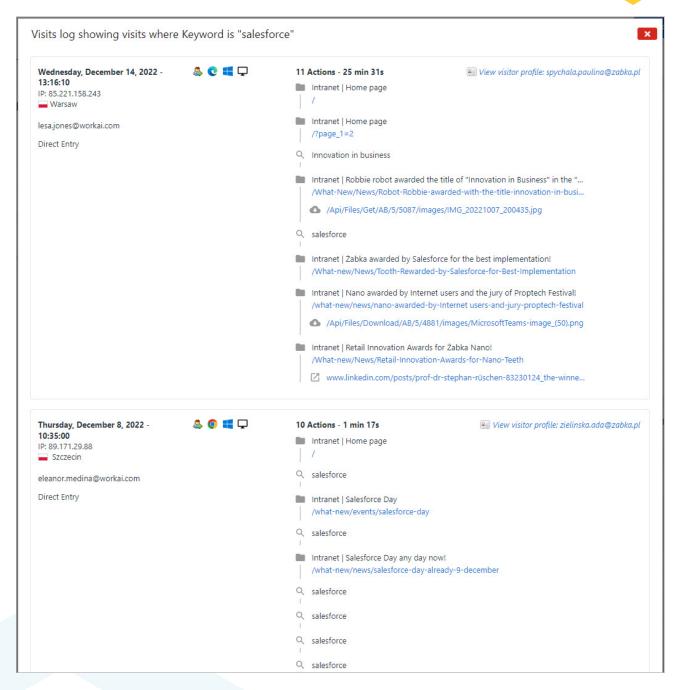


Workai's analytics provides reporting on the most used search terms and search terms that produced no results, which are both important for maintaining the quality of the search experience. One unusual but powerful aspect of this reporting is the ability to click on these keywords and see the employee journeys that involved the user searching for that specific term, so where the employee was before, and where they went afterwards.



Workai analytics include monitoring of search usage and performance.





Employee journeys involving the use of search and specific search terms can provide valuable insight into why people search for content and what they find.



## THINGS TO BEAR IN MIND

Workai is a communication and engagement focused intranet that does these elements very well. However, the strong social community component of the platform (Connections) is entirely separate from the intranet. This means that search does not include results from Connections and the engagement component of news articles is independent of it too. There is no 'share this article with your community' option. Connections is a well-featured platform in its own right, however, and it is possible to show a feed from the timeline on the intranet.

Connections is one of many paid-for additional modules that customers choose whether to switch on. Organisations should therefore discuss the cost implication of turning on or off modules as appropriate, as it can make a significant difference. Additionally, those who choose to implement a range of modules should consider the impact on the mobile environment so as not to overwhelm mobile users with too much functionality.

Digital workplace integration is not a focus for this product, particularly with non-Microsoft services. There is the ability to show posts from Facebook, Twitter etc, but if you are looking for out of the box integration with Workday or SAP SuccessFactors you need to look elsewhere, or budget for additional integration work. It's also worth noting that partner locations are limited to Germany and the Netherlands at present.

Workai is surprisingly expensive for larger organisations over 20,000 employees. The lack of granularity in administration roles, basic branding and lack of multilingual support would appear to make the product less appealing to larger organisations anyway, but the pricing is definitely more attractive for small to medium sized organisations. Additionally, smaller organisations up to 500 employees can set up their intranet via a self-service provisioning and configuration process with a walkthrough wizard. This would enable them to have their intranet deployed in a matter of minutes and ready for use by admins and publishers.

## Why choose this product

Workai will appeal to organisations that want to run their intranet platform with minimal support from the vendor and their IT department. The flexibility of modules will also be appealing to businesses that want a range of functionality. It has a great user experience for employees and administrators alike, where administration capabilities are also easy for non-technical roles to use. The content editor is especially powerful and easy to use with minimal training, and we like the search and analytics experience too.



# workvivo



## Our view in one tweet

@Workvivo combines a modern, elegant design with plenty of options for employee engagement in an effective, dynamic communications package.



## Workvivo owned by Workvivo

Workvivo was founded in 2017 and is headquartered in Cork, Ireland, with bases in the UK and USA. The product is very attractively designed, and is strong in providing ways to communicate to employees and to allow users to interact with each other. The livestreaming, podcast, and digital signage solutions are stand-out features here. Options for reacting to and engaging with content are provided throughout, and 'Spaces' (effectively microsites within the main site) offer a feature-rich and versatile way to generate communities or to take a more interactive approach to topic-led content.

Workvivo is less suited to building and structuring a large amount of pagebased content, for instance to accommodate policy or guidance information. The way that navigation is compiled and presented may place constraints on publishers who want to take a more traditional pagebased approach rather than using Spaces. Integrations with business systems and the M365 suite are relatively limited, and analytics would benefit from some attention.

Overall, Workvivo will suit medium to large sized businesses with a dispersed workforce across multiple locations. Additionally, with an attractive mobile solution and good connections into SharePoint, Workvivo could work well as an effective solution for frontline workers that complements an established SharePoint intranet.

## Summary table of scenario scores

## NO. SCENARIO/SCORE 1 User experience and visual appeal Mobile and frontline support 2 Internal communication 3 Community and engagement 4 5 Information finding and knowledge management 6 Admin experience and governance Analytics 7 Digital workplace integrations 8 Microsoft 365 integration 10 Wildcard

## **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, government / public sector, multi-year commitments, businesses over 20,000 users.

Price includes: Project workshops, training for admins, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, Microsoft 365 set-up, hosting, onboarding user data, access to a community & webinars.

## Key benefits

- Workvivo provides a well-executed and attractive user interface with plenty of options for users to engage with content and interact with each other.
- Content creation and publishing is simple and quick, whether posting micro-messages or producing full article pages.
- 'Spaces' are ideally suited to creating communities and more engaging topic-led content than just using standard pages.
- Real-time translation options are a powerful way to offer multi-lingual audiences parity of experience across the site.
- Workvivo includes some unusual and well executed communications options, including livestreaming, podcasts and digital signage.

## Improvements and considerations

- The product currently doesn't score highly for its approach to analytics, although the imminent arrival of dashboards should improve this area significantly.
- Overall, there isn't significant integration with M365 when compared with other products in this report, although there are good opportunities to connect to SharePoint.
- Options for building site navigation are relatively limited within the Pages section.
- Areas of the search experience would benefit from some development.



## **Product type**



## **Branding opportunities**



## Target businesses







## Base systems



## Sectors



You may also be interested in...





## **COMPANY AND PRODUCT**

## Company details



Company Workvivo



Company founded

2017



**Company locations** 

Cork, Ireland (HQ), USA, UK



ISO 27001 certified

Yes



Typical client size

1,000-6,000 employees



Largest deployment so far

Dollar General: 200,000 employees Globally employees across APAC, EMEA and AMER; Corporate, Retail, Distribution and Manufacturing employees



#### Partner locations

USA, Australia, India, Indonesia, Malaysia, Philippines, Singapore, Sri Lanka, Austria, Bulgaria, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Iceland, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Spain, Sweden, Switzerland, Ukraine, United Kingdom, Mauritius, Oman, Qatar, Saudi Arabia, South Africa, UAE



#### Customers

Clients include: Bupa, Dollar General, Amazon, Clipper Logistics, TELUS International, VMware, Madison Square Garden, A+E Networks, AIB, Everton F. C.



## Product and technical details

Name of product	Workvivo
Product launched	2018
Current version	Workvivo is a SaaS Internal Communications platform, the latest major release was September 2022.
Accessibility	Whilst Workvivo are not fully compliant, they develop all their web features with WCAG 2.1AA in mind. Workvivo supports users who use a screen reader to navigate the web, they can do so as all Workvivo elements have explicit indication as to what the element does when pressed, alternative text is available on images, any changes that happen on the UI will get announced to the screen reader user (e.g. when they like a post, it will let the user know they have liked that post), and much more.

#### Deployment

premises cloud near services nosted gog tendric		ient on- remises	Client private cloud	Microsoft Azure	Amazon Web Services	Vendor- hosted	Microsoft 365 tenant	Other
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## Client data encrypted

In transit only	In transit and at rest	At rest only

## Authentication supported

Azure Active Directory ADFS	Open ID	Oauth	G Suite	Other
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#### Search technology



#### Data residency

Workvivo is hosted on Amazon Web Services in two separate regions. First is Europe (Primary Data Center in Ireland and Disaster Recovery Center in Germany), second is USA (Primary Data Center in Oregon and Disaster Recovery Center in Ohio). Customers can choose the data centre they would like their instance of Workvivo to be deployed.

#### Document library sources integrated

<b>Box</b> Dro	pbox Google Drive	SharePoint	OneDrive	Other
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#### SharePoint/0365 versions supported (if applicable)

	SP Server 2016	SP Server 2019	SP Server Subscription Edition	SP Online	Viva Connections
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#### Mobile app deployment

Google Play store Apple sto	re MDM	МАМ	Other
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#### Reverse-out options

As part of Workvivo's Master Services Agreement (MSA), the customer's data will be returned to the client as part of the exit agreement. This includes all transactional data as well as media files. A grace period is agreed after termination of the agreement to support the transfer of this data to the client. Any data that isn't transferred is permanently deleted.

#### Languages supported

Workvivo support languages in two ways on the platform. First, static content such as labels, buttons etc. These translations are built into the product as they are professionally translated upfront. Workvivo currently supports the following languages (more languages can be easily added): English (UK), English (US), Arabic, Bulgarian, Czech, Danish, German, Greek, Spanish, Spanish (Latin American), Finnish, French, Irish, Hebrew, Hindi, Croatian, Hungarian, Italian, Japanese, Kazakh, Korean, Malay, Dutch, Norwegian, Polish, Portuguese, Portuguese (Brazilian), Romanian, Russian, Slovak, Slovenian, Swedish, Tagalog, Turkish, Chinese (Simplified), Chinese (Traditional).

Second, dynamic content such as articles, updates, comments etc. This content is auto translated by Amazon Web Services (AWS Translate), which currently supports 75 languages.

Machine translation Yes - via the product	
Right to left script Yes	



## Set-up and support

#### Set-up process for new clients

New customers are onboarded using Workvivo's project methodology that consists of 4 areas: Technical Setup, System Customisation, Change Management and Content Creation. Workvivo projects can run from 4 weeks in duration up to 12+ weeks for enterprise customers.

#### **Product updates**

Workvivo is updated on a continuous basis with major features being released every month.

#### Product update process

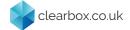
All customers are updated at once. However, major new features are 'feature gated', enabling customers to enable / disable these features at their own convenience.

#### Technical support

Workvivo provides all day, every day support to their customers, depending on the SLAs agreed in the contract.

#### User community

Workvivo's weekly newsletter, vivowire, receives regular positive feedback and engagement from readers. The vivowire audience is a 25,000-strong community of people passionate about employee experience, workplace culture, work trends, and more.



#### In their own words

Workvivo says: "Workvivo is a new breed of intranet platform designed to help companies reach, engage and truly connect their employees in ways that traditional tools can't. It's your intranet, internal comms tool, employee app, all merged into one familiar social experience at the very heart of your digital workplace."

## Their view of the marketplace

Workvivo says: "In a time of chronic disengagement, and disconnection, companies are missing a central hub for work where they can access everything they need. Keeping your employees engaged, motivated, and connected to your company's culture, values and goals has become the number-one challenge facing all leaders. Legacy intranets are obsolete, rigid, and poorly adopted by employees. The modern employee needs a modern experience that helps them get their job done while also fostering a sense of belonging and connection to the company, its people and goals."

## Voice of the customer

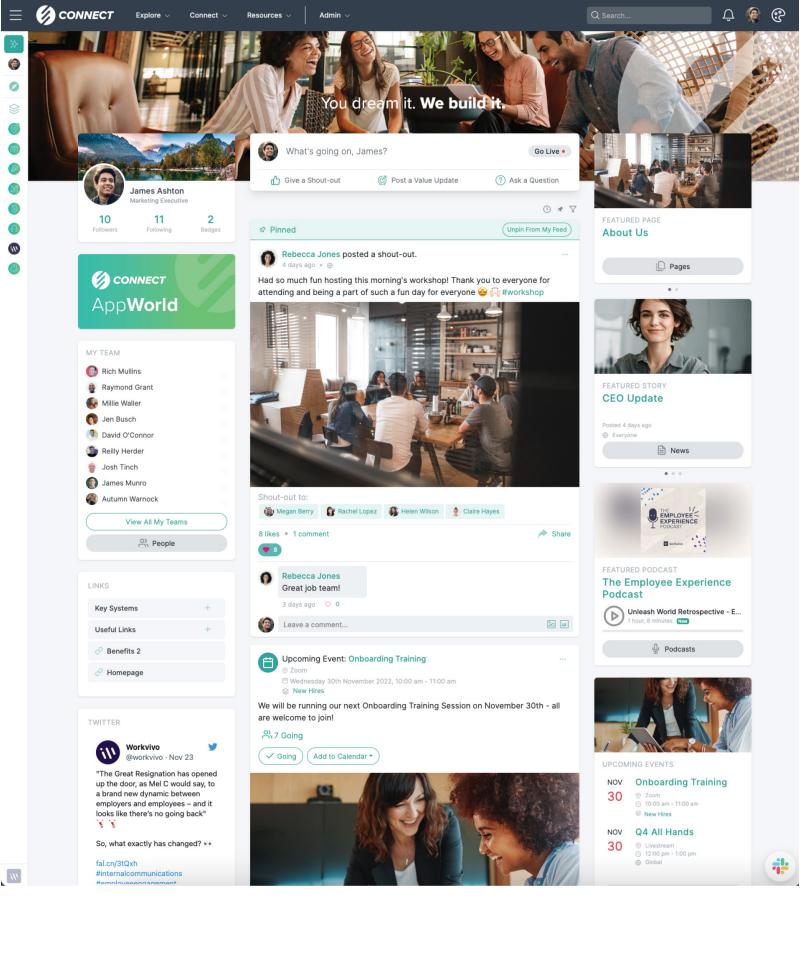
We received a high volume of feedback about Workvivo, where customers provided very positive feedback. They highlight how much they like its community features, along with the overall user-friendly interface, the regular roll out of new features and the way employees engage with communications through social interactions. A typical comment was, "It's very simple and intuitive to use, with lots of great features that allow for targeting of communications to specific audiences via Spaces and has really improved two-way communications among employees at our company".

It's clear from feedback that customers value the functionality available to them, but they are keen for yet more, with one customer saying, "its many capabilities...enhance our internal communications, such as podcast, live streaming and other more back-end features like default automated translations for news articles. [We also like] how they continuously work on enhancing the user experience and keep coming up with new features."

There's a desire for greater administrator control over publishing and configuration. One customer said they "would like to be able to change the templates for publishing, right now that is not possible so there is a lot of manual changing of fonts and sizes", while another would like to see "more features like photo galleries and easier customisation from an admin standpoint." Several customers mentioned a desire for "more robust analytics", while another commented "I'd love to see more advanced surveys and deeper sentiment analytics".

"Excellent", "Incredible", "Amazing" – all words used by customers to describe their experience of working with the vendor. Customers universally feel Workvivo is responsive to requests and dealing with issues and that they genuinely listen to their customers. One commented, "I've worked with many different platform vendors in my time and I can categorically say that Workvivo has been and continues to be top level in its implementation and support to us as a customer".





## **REVIEW**

## 1. User experience and visual appeal

SCORE 3.5

Workvivo provides a layout and design that feels comfortably familiar, drawing heavily on elements of social sites to structure an appealing desktop experience. The main focus is the activity feed, although there's the option of a more traditional article-led approach to the home page where corporate content such as news and pages can be promoted. On desktop, this 'Spotlight' layout can be a little confusing visually at the head of the page with images

layered over each other but, overall, presentation is very engaging, even elegant. See the Highlights for more on Spotlight.

For end users, navigation is simple to negotiate but there's not much flexibility for admins to arrange menu items, being largely determined by which features and applications are enabled. Top level navigation provides links to tools and subsections, and a left-hand fly-out panel gives access to 'Spaces'. These are personalised to the user based on their permissions and are a key element in Workvivo's structure (they are covered in more detail in the Highlights). On desktop, the icon size in the Spaces panel is quite small and contrast is an issue to watch out for; icon shapes can be indistinguishable with lighter colour schemes, which might compromise accessibility compliance. Sub-navigation can be added into the Pages section but is not particularly suited to building deep navigation.

The notification panel is presented plainly as a list of text updates. Content can be provided from both within Workvivo and via integrations from workplace applications. If you miss a notification, weekly summary emails will let you know how many you've received and what you might have missed. Employees can configure which notifications they receive, however, there isn't a way to filter to show unread notifications, or to mark them as unread.

Workvivo strikes a happy balance between visual appeal and functionality. Branding options are somewhat limited though, and very brand-focused companies might find themselves slightly constrained. A corporate logo can be added to the site banner and top-level navigation colours can be tailored, as well as primary and secondary colour schemes for elements such as links, however, it's not possible to deviate from the standard Workvivo font. The vendor points to the banner image alongside the colour palette and logo to provide distinctions between sub-brands, but where a clearer demarcation is required it is possible to run multiple Workvivo instances.



## 2. Mobile and frontline support

score 3.5

Users gain mobile access by downloading the app from the relevant store. There's also the option to deploy the site through MDM/MAM. Workvivo typically encourage adoption through offline means such as QR codes on posters which link to the app in the store; QR codes can also be featured on the digital signage dashboard (see Scenario 3). Workvivo needs only a name and email address to set up a user, though usually there will be integration with an

HR system or Active Directory. Users can also be added within the system or by CSV upload. Biometric access is available, and once logged on a user can use the biometric key to reopen the app.

On mobile, the activity feed is the focus, with access to Spaces across the top of the screen and 'Spotlight' content on the bottom menu. Desktop mega menu options are brought into a single flyout list accessible from a burger button. Visually, the app is laid out cleanly and clearly.

However, mobile search isn't entirely consistent with the desktop, lacking the ability to integrate with M365, although suggested returns are given more prominence than on desktop. Detailed filtering isn't available, but users can view all content returned under a given category. As with desktop, search only returns content the user has permission to access.

The document library is handled well. Files are viewable as a preview in the app so they don't have to be downloaded. The ability to share or download a document can be disabled, and permissions set for desktop translate across to the app. Documents will open directly from the activity feed, and these can be made mandatory reads.

There are a few noteworthy frontline features. First, Workvivo has a podcast section able to feature both internally and externally generated podcasts. The vendor highlighted this section's popularity with mobile users. Second is livestreaming, which we cover in Scenario 10. At time of writing, Workvivo are due to implement a chat feature for mobile which could appeal to frontline users.

No mobile-specific features or administration options are provided, and so the experience across desktop and mobile is consistent, with some exceptions such as M365 integration mentioned above.

## 3. Internal communication

score 4

Targeted communications are very much the focus of Workvivo, with a good variety of options for messaging and news. Most implementations place the activity feed front and centre on the home page, with an emphasis on posting short, bite-sized content in a social media style. Longer articles can be trailed in the feed and when opened, the article appears as a pop-up rather than linking off to a page.

For communications teams with a high turnover of content, there may be some issues with keeping important messages visible in this environment. However, posts can be pinned to the top of the feed, and functions such as notifications and read acknowledgements could be used creatively to ensure key messages reach their audience. A 'featured article' carousel can be added into the right-hand column to help too. Alternatively, the 'Spotlight' section can be used

as a home page (see the Highlights), and there's also a dedicated news section.

Notifications play a key part in helping promote messaging and engagement, however, where high volumes of content are posted, this could quickly become overwhelming, and as noted elsewhere, there isn't a way for users to manage their notification list. Users can configure which notifications they want to receive though, and while this is helpful, it potentially reduces the effectiveness of notifications for relaying urgent or crisis messaging. Users are also able to unpin pinned posts.

When creating news articles, static pages, and landing pages, the rich text editor includes 'cards' to help with templating, providing attractive page body layouts, which achieve pleasing results. All articles and posts can be targeted, and Workvivo has a consistent approach to this, with options to post globally to members of Spaces, to teams (departments or locations), or to personal followers. We liked the comms calendar and the option to associate a post with a company value, which is an unusual feature and an innovative way to help promote values to employees (see the Highlights for more).

In addition to the features above, Workvivo has good mandatory read functionality, a simple daily / weekly email digest, and provides users with the ability to post links to content into Slack and MS Teams (see Scenario 9), or externally to sites such as LinkedIn. Customers may also present the site in a 'dashboard' configuration for use on TV screens, displaying on smart TVs through a browser (please see the Highlights for details).

## 4. Community and engagement

the Spaces context. We cover these in more detail in Highlights.

SCORE 3.5

Communities and social interactions are particularly strong in Workvivo, with well thought out features placing an emphasis on communication between users. The principal area for these interactions is Spaces; sections intended for use by communities and interest groups, though they may equally have a corporate or operational purpose, such as employee onboarding. They're essentially versatile microsites, providing much of Workvivo's functionality within

Users can like, share or comment, and like other people's comments. In the activity feed, a user can post short polls in a Twitter style, add 'shout outs' to colleagues, and tag content as related to a company value. Users may choose who to reach directly from the feed post, for instance their followers, or a particular Space.

Workvivo has an easy-to-configure function for users to nominate colleagues for awards, where users receive a notification when new award nominations are open. There's also a badge function, which could be used to provide recognition, or potentially in a more operational way, for example to denote foreign language speakers. The badges feel a little like a solution in search of a problem however, requiring careful thought and set up by admins.

The employee survey feature is consistent on desktop and mobile, with admins able to select from a set of pre-existing questions across a range of topics to compile a survey. Once live it appears at the top of the activity feed and remains there until completed or the survey expires. While a wide range of questions is provided, this feature might not be flexible enough for everyone. We would like to see the option to create new themes and add new questions.

An impressive amount of thought has gone into content moderation. Users can report any post and this will be sent to the administrator. Alternatively, admins can block words, expressions, phrases, numbers (for example credit cards); users who try to post a blocked word will see a pop-up of terms and conditions reminding them of their obligations.



## 5. Information finding and knowledge management

SCORE 3.5

For most users, the search experience will be perfectly adequate, with a range of refinement options and the ability to search across integrations with Microsoft and Google services. Global search provides suggested results on entry of the search term, and a full set of results is easily accessed. While users can filter returns, the experience is very much out of the box, with little configuration available. There isn't an option to provide sponsored or

promoted results, though featured documents can be highlighted in the document repository. Publishers can tag an article, and this will appear in search returns, but tags can't be used to aggregate a body of content.

Pages and articles published within Workvivo are fully indexed, but search on PDFs is limited to file content metadata rather than body text. Note, though, that where SharePoint has been integrated via API, search will look through body content for documents housed there.

In the people search, any user-defined profile field is searchable. While there isn't a specific skills or expertise section on profiles, users could add these details into the profile keywords panel and the details would appear in people search returns. Search in the people section offers more specific filters such as team or location. Additionally, team profiles will display team members, and users with relevant permissions can also view members of Spaces. An organisation chart is accessible from the top menu or via employee profiles. It is autogenerated, just requiring a manager ID to be available in the user provisioning file. This is often a tricky feature to do well and we liked how Workvivo handles it.

Aside from global search, users can search within individual areas such as the people directory, or Spaces. Workvivo also offers a generic 'pages' section where information can be published in a navigable structure, but pages can also be built within Spaces. There's potential for confusion here for users as admins will need to be diligent in managing what's held in pages and what is housed in Spaces. Pages are compiled in the same way regardless of function, with 'cards' providing some structure, although there aren't specific templates to assist with building content such as policies.

## 6. Admin experience and governance

SCORE 3+

Administration in Workvivo is generally presented well. Some lists for functions such as role management are lengthy, and we'd like to see these streamlined. However, user roles can be assigned directly with an extensive list available. Roles may also be brought in through the Workvivo API used for automated user provisioning. We liked that at the Space level roles are fully configurable, and a user could have access to multiple Spaces with different role permissions

for each one.

There's a simple one-step publishing workflow available for news articles, essentially to allow proofreading of content prior to publication. There's no workflow available for content published within Spaces or pages, however the creation of Spaces themselves can require approval from site admins.

Home page layout options are out of the box and admins don't have complete control over design. In the left column, it's possible to order the contents of the useful links panel, and widgets can be switched on or off, but otherwise layout is set. Conversely, there's a drag-and-



drop option for re-ordering the right-hand column, and custom widgets may be brought in by integration through RSS feed or API, though these need to be implemented by Workvivo.

Content life cycle administration is slightly inconsistent and overall content governance is a little thin. It's possible to set an archive date for a news item but not on pages. News articles and pages have a last updated date, but no version history is available, which feels like an omission. Document expiry dates and times are set at point of upload and can be amended once the document is live. Spaces and their contents can be manually archived and restored but there's no automatic expiry option.

Workvivo provides a variety of helpful translation features. A default language is applied to static content and labels during site set up, then on first log-on, users are asked if they would like to change to a preferred language. AWS machine translation is used for article publishing; body content, title, subtitle are all translated and amendable prior to publication. We cover details of real-time translation in the Highlights.

## 7. Analytics

score 2+

Analytics is one of Workvivo's weaker features given the strong communications focus of the product, and the lack of out of the box reporting options is worth noting. Customer feedback tends to support this view. The vendor highlights that during implementation they work with customers to identify required reports, and these are then provided in the Reports section or can be emailed out. Workvivo also use AWS QuickSight to

build dashboards which are shared with customers on a weekly or quarterly basis. The capability for users to generate their own dashboards is due in Q1 2023.

As standard, there are basic overview statistics providing a digest of activity from the previous week up to a year before. On individual content items, publishers see a report showing metrics including reach, impressions, platform, location, and engagement. These reports can be exported on a per-article basis.

Mandatory reads ('Acknowledgements') generate their own reports and there is a neat call to action within the report to send users a notification to remind them to view the content. Spaces also have a dashboard which shows some standard engagement statistics. Survey analytics are broken down by location and department and, in a welcome acknowledgement of privacy, user breakdown is only provided where there are more than five respondents in a department.

Beyond this, however, there are some notable gaps. While a report is available for a whole Space, an out-of-the-box report isn't available for news section content, with reporting only on a per-article basis. Standard report downloads, which cover site-wide activity, focus on engagement metrics such as shout-outs, or general activity around volume of content published, and not every report is exportable. There are some potentially extraneous reports – for example, breakdown by browser and OS won't be of huge use to companies who provide standard equipment to employees. Additionally, there is no reporting available for on-site search, either as standard or as a bespoke report.

Log file data can of course be provided for use with third-party dashboarding tools such as PowerBI, however, overall, this is an area that could be improved, and we await the arrival of dashboards with interest.



## 8. Digital workplace integrations

SCORE 1.5+

Workvivo has multiple integration points with other services. These focus on providing visibility of content or notifications, though there are some options for users to transact with third-party tools directly without leaving the site.

On a simple level, there's an app library providing single click access via Single Sign-On. Key links can be brought onto the home page or into Spaces via a useful links panel. There are plug and play integrations with YouTube and

Twitter, and custom widgets can pull content onto the home page through RSS or API, though these will need to be implemented by Workvivo.

More sophisticated integration is available with applications such as ServiceNow and Slack through their chat functions. Workvivo says that the product can surface any third party chatbot on the platform, allowing people to perform tasks such as raising and tracking tickets or searching a knowledge base without leaving Workvivo. This is a useful approach, though we'd also welcome out of the box widget options for this type of activity.

Integration is also available with third-party mail and calendar tools (for example Outlook, Gmail, Apple calendar). Content from these platforms is displayed in the site, and users can add Workvivo events into Google or Outlook calendars directly. Additionally, if a Zoom account has been associated with a user profile, a Zoom link to the event is auto-generated. To perform actions such as sending email, however, users need to leave the site. Alongside Drive and Box, Workvivo integrates with SharePoint. Site search will show results from any connected file repository.

There are further opportunities using APIs. For example, the site could connect to software such as an image database, allowing publishers to select images directly for use when publishing their Workvivo content. Another example would be to use an API to pull news articles published on another platform into the site. Conversely, Workvivo's own API can be used to push any site content onto third-party platforms.

## 9. Microsoft 365 integration

score 2.5

We like that news and events published on a SharePoint site can be displayed in Workvivo and on the digital signage dashboard. This positions Workvivo as a potential complement to an established SharePoint intranet, especially where a company has a large number of frontline workers that need an effective app solution. Where desired, admins can add links to SharePoint sites or MS Teams channels into the app launcher.

Integrated search can be enabled and will search across M365 if connected. Results will be initially aggregated with Workvivo content in the summary, but are also available on a separate tab for each connected application. Helpfully these results include SharePoint, OneDrive and Outlook.

There are several touchpoints with MS Teams. Posts and articles can be shared into a Teams channel, with the option to add a message to display along with the post in Teams. Additionally, a Space can be connected to a Teams channel and an auto-generated message will drop into the selected channel daily or weekly, providing a digest of activity from the



Space. Users can open Chat within Teams through a direct link from a Workvivo user profile. The link will take the user out of Workvivo and onto the Teams desktop or mobile app, depending on the user's device.

There's a further option to integrate with Stream but there's no integration with Yammer - the vendor understandably regards Workvivo as an alternative to it - and there's no direct integration with Viva. Outlook and Outlook Calendar can be connected, allowing content from these to be consumed within Workvivo, and users are able to add Workvivo events into Outlook calendars directly.

Overall, there are limited integration points with M365 at present in comparison to other products in this report; although it is understandable why Yammer and Viva are missing. There are some further integrations with SharePoint and MS Teams that we think would expand the already good feature set yet further, such as being able to access Workvivo from within Teams, or embed Teams channels or even SharePoint libraries in a Space.

## 10. Wildcard

SCORE

The wildcard for Workvivo is livestreaming, which we think is delivered well overall. Livestreaming is a bold channel option, and one which is likely to spark a degree of panic with internal communications managers. Executed well it could be a game-changer not only for increasing employee engagement with senior leaders and corporate messaging, but also with fostering an open and collaborative culture. Coaching is available from Workvivo to help companies use the function effectively.

Live streams are typically kicked off through the mobile app. Permission to stream is assigned through a bespoke role and, understandably, Workvivo recommends limiting it to selected people. Prior to starting the stream, the presenter can add a title and description to set the scene for the audience, which itself can be determined using the standard Workvivo segmentation choices. There's also a co-host option where up to four others can be invited to join as presenters; this number can be increased to add up to 15. Recording is on by default, as are auto-generated captions. Real-time translation is due to be available at the point this review is published.

A message that the stream is in progress appears at the top of the activity feed for the relevant audience, and they will also receive a notification if they have selected livestreams as a notification option. In the course of the livestream, viewers can add comments and engage with the discussion. Once the stream has ended, the video of the recording becomes available for sharing in the activity feed and a report on engagement statistics is generated for admins.

The value of the feature lies principally in the ability to get real-time, authentic messages out to employees in a dynamic way. Some will no doubt raise the perceived tension between the benefit of engaging with video content and the time spent consuming it, or unexpected interruptions to the work day. However, the potential to raise the visibility and credibility of senior leaders and key personnel, along with the ability to connect employees company-wide, is substantial. Note that you can read more about livestreaming (and podcasts) in our other free report.

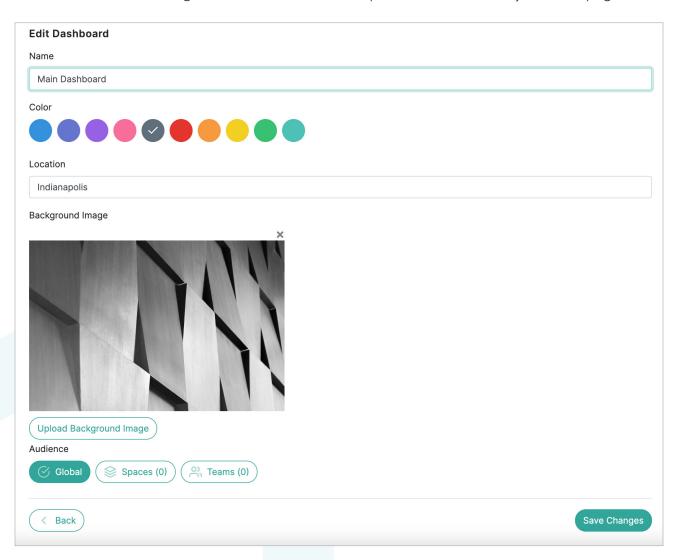


## **PRODUCT HIGHLIGHTS**

## Digital signage dashboard

Workvivo can be presented in a 'dashboard' configuration for use with digital signage, displaying on smart TVs through a browser. Setting up the dashboard is very easy, and new boards can be created and pushed live in a matter of seconds. Once the dashboard is ready to publish, admins generate an authentication code from the dashboard management console. This provides access to the dashboard when entered on the local device.

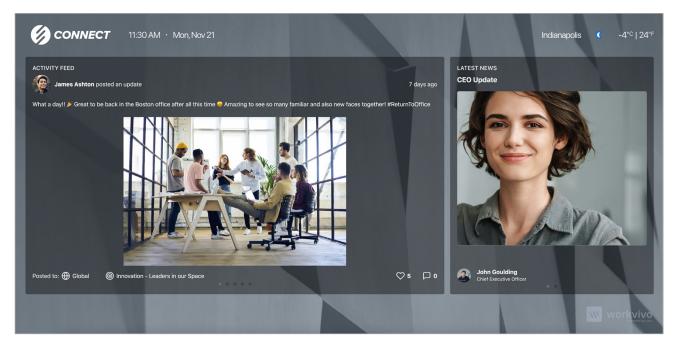
Admins can select a background image to sit behind the content widgets, though this does get a little lost, as well as an overall colour scheme for the dashboard. There's also the option to add a location which brings in time, weather and temperature automatically onto the page.



Digital signage dashboards are easy to set up and configure by administrators.



The dashboard provides the latest information from the activity feed, the news section, and events updates. The activity feed is presented as the main element on the page with news and events on the right-hand side. Content can be segmented using the normal Workvivo permissions, and QR codes can be added to the dashboard to provide a quick link to content for mobile users. Content is displayed in carousel widgets, and cycles through the latest posts for each of the three content areas simultaneously. It's very cleanly laid out and designed to be easy to digest from a distance.



The dashboard has a two-column format where content is held in carousel widgets which cycle automatically.



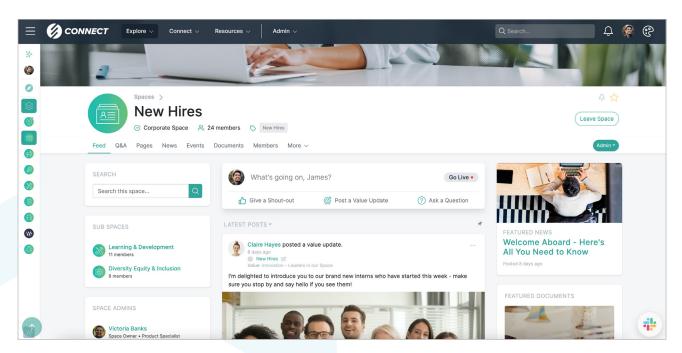
## Spaces and their social features

Spaces provide a way to target audiences such as through geographical, functional, or departmental groupings; the Spaces an employee is a member of then determines much of the content on their feed. To expand the functionality yet further, Workvivo also describes Spaces as 'giving employees a voice'; this is evident in the wide range of social reactions available where users can add comments, likes, replies to comments, and post and share content to other Spaces. Users can also add Twitter-style quick polls to a post. We like the 'Shout Out' feature for tagging colleagues or teams and the vendor says that this as one of the most used features in the platform.

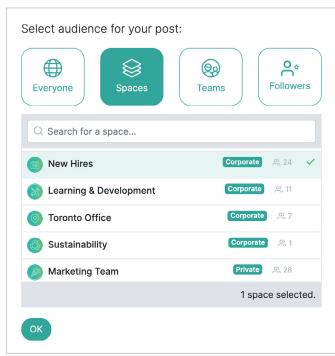
Admins have the option to switch off the ability for all users to post content and instead just allow permission-based publishing. Content is targeted by default at the audience for the Space but can be published to other Spaces and audiences simultaneously. As with the main activity feed, publishers have the option to link their post to company values too.

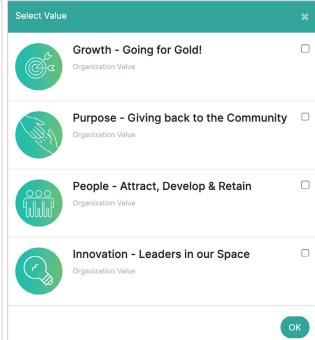
Users can be invited to a Space, or be enrolled directly, after which they will see content from the Space in their feed. It's also possible to set up an external-facing Space which users outside the business can access. These users will only be able to see the Space they have been invited to. This has great potential, for example to help onboard employees before their first day, or for working with third parties such as suppliers.

Spaces also have a Q&A section where users may ask questions and receive responses. Questions can be voted up or down to reflect popularity and be shared with other Spaces. They will also show on the main activity feed for anyone with permission to view content from the Space.



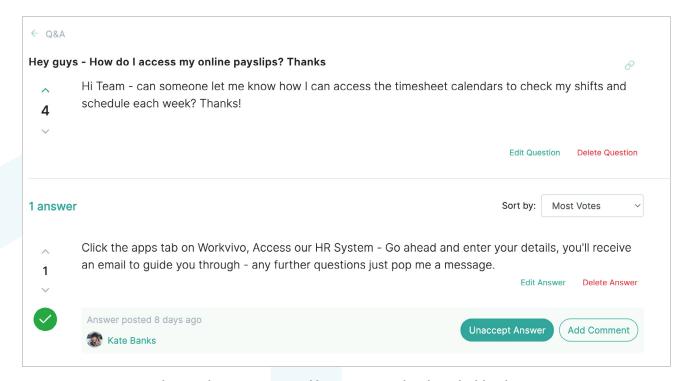
Spaces provide a 'sub-site' experience within Workvivo.





Publishers can easily select which audiences to target their content to and publish to multiple Spaces at once if desired.

Publishers can apply company values to a post.



Questions and Answers created in a Space can be shared with other Spaces and will show on the main activity feed where a user has permission to see them.

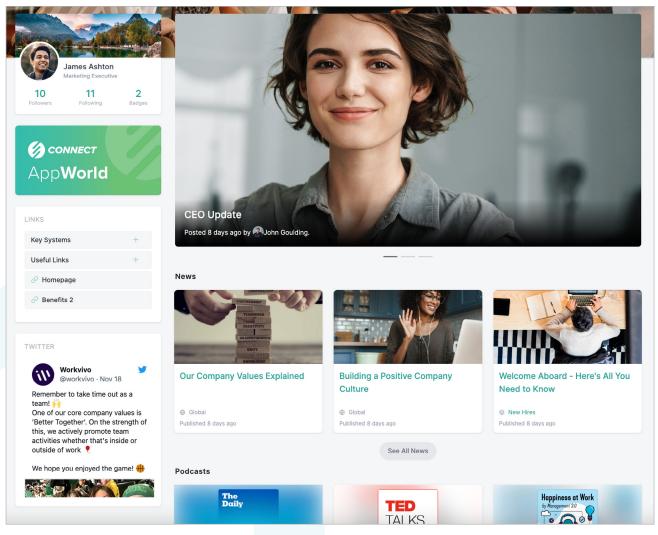


## Using the Spotlight and News for communications

For companies who prefer a more traditional article-led home page, Workvivo's 'Spotlight' can be implemented in place of the activity feed. The Spotlight is an automatically-created landing page with the option for featured content to be added by publishers. It displays the most recent items from key content areas such as news, pages, and events, all based on user permissions.

At the top of the page there's a carousel of hero articles which the user can click through; these are set by administrators or publishers in the news configuration. Below this, content 'lanes' with items from news, pages, podcasts, and events are displayed, again based on permissions, with calls to action to view all content for each of these areas. Three items are displayed by default, and if additional featured articles are present, the user can click to scroll through these.

Publishers can choose an item to appear in the Spotlight 'lanes' by selecting 'featured page' in the page editor, and the featured article must have an accompanying image. It will remain in place until removed manually or, in the case of news items, the item reaches a designated archive date. The Spotlight is also available where the activities feed is set as the home page, accessible through a link in the left-hand navigation.



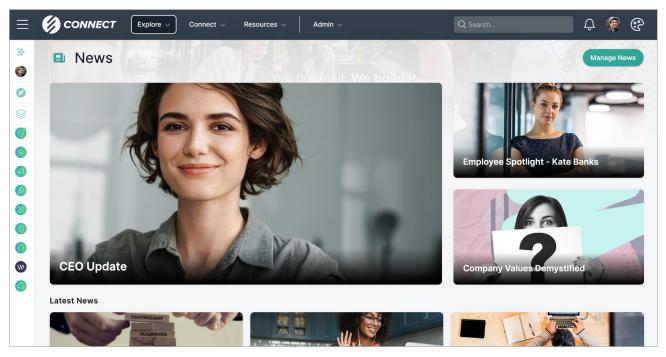
The Spotlight is automatically compiled, with publishers able to add featured items into the content lanes and the main carousel.



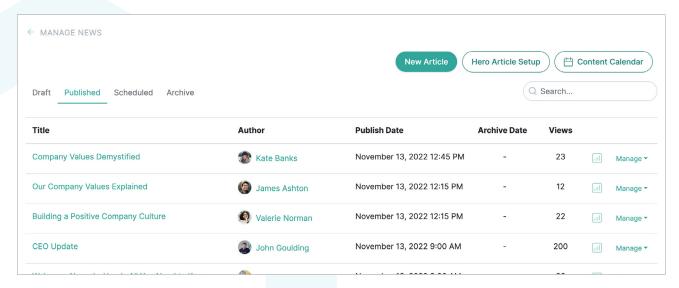
#### The news section

Workvivo's news section is complementary to the Spotlight home page, providing featured news along with the most recently published articles listed in chronological order. 'Latest news' items will remain in place until superseded by a fresh article, or when they reach their archive date (if one has been set).

Administrators have access to a number of tools behind the scenes to help them curate this section. In the 'Manage News' dashboard, content is listed by its status in draft, published, scheduled, rejected or archived. Each entry shows article published and archived dates, and there's a lifetime page views counter, along with access to the detailed page report, and options to view, edit or archive the page.



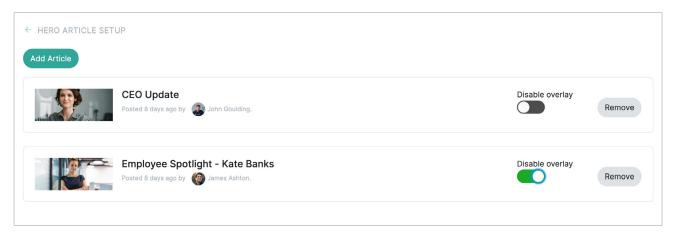
The news section combines a section for promoted articles along with latest news presented in chronological order.



The news administration lets publishers view articles by status such as in draft, in review, published, scheduled and archived.



The main news page is managed from here too, via the 'hero article' dashboard. The display order of articles is easily arranged via drag and drop, and the article title overlay can be disabled. Some caution might be needed not to overpopulate this area at the expense of the visibility of latest news further down the page. However, to help with scheduling there's a content calendar which shows news, posts and events that are ready to be published.



The featured article panel on the news page is managed in the 'hero article' dashboard, which uses drag and drop for changing the order.



The content calendar gives an at-a-glance view of content that is scheduled for publishing.

## **Translation**

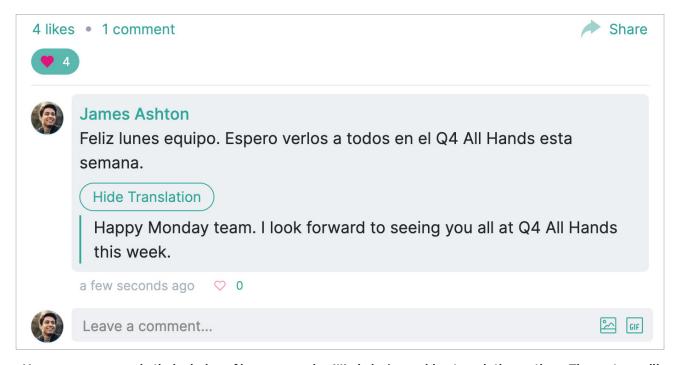
Workvivo has a variety of translation options allowing users to interact with content in their preferred language. A default language is applied to static content and labels during site set up; then on first log-on, end users are asked if they would like to change to a preferred language. If so, the system text in the site will update, for instance menu labels and standard text accompanying posts or updates.

Articles can be published in multiple languages, and the content will display to the user based on their device's settings. If a translation isn't available, the item will default to displaying in the language in which it was created. To avoid translation issues, authors can use Workvivo's workflow to send an article for proof reading before publication. Users also see a call to action prompting them to report incorrect translations so that the translation quality across the site can be improved.



Workvivo will present system text and calls to action in the user's choice of language.

There's real time auto-translation of feed content option, which means that users aren't compelled to use a second or additional language to speak with colleagues elsewhere in the business through the site. Users simply click a button on the post and the translation is instantly displayed below the original post. The translation function is even good enough to recognise typos in the original language and compensate for these in the translation. Furthermore, Workvivo was planning to add real-time translation to their livestream function at the end of 2022.



Users can converse in their choice of language using Workvivo's machine translation options. The system will even compensate for typos made in the untranslated post and interpret them correctly.



## THINGS TO BEAR IN MIND

Businesses with complex needs may find out-of-the-box functionality limited in certain areas. For example, Workvivo's approach to structuring page content is somewhat simple, and companies who want to construct a knowledge base within the site may find themselves constrained by the way this is achieved. A further consideration is that while archive dates can be set for news items, they can't be applied to standard content pages, creating an overhead for site managers in terms of content life cycle. There is also no page history or versions trail, meaning log files would need to be used if auditing is required.

Additionally, Workvivo has a light touch in relation to branding, with relatively few options to tailor the design to reflect these requirements; the site font can't be changed, for example. Companies with a particular focus on their brand might find this too restrictive. The product is also not as well integrated with M365 as some other options, with no M365 integration available on mobile. This is worth bearing in mind, however there are some good opportunities through connections to SharePoint and integration points with other third-party tools.

As noted in Scenario 7, analytics isn't Workvivo's strongest feature and customer feedback reflects that this is an area that would benefit from improvement. While Workvivo work with clients in advance of implementation to set up reporting and also provide dashboard reports on a regular basis, companies with specific requirements around analytics will want to reassure themselves that their reporting needs can be met.

Finally, the price point for Workvivo is towards the higher end of the scale, though there are discounts available for some business types. Smaller customers who are looking principally for a communications-focused product with a consumer-app feel may find other products offer similar functionality at a lower price. However, price shouldn't necessarily exclude Workvivo from consideration in our opinion, as there is a lot on offer.

## Why choose this product

Workvivo combines a modern, elegant design with plentiful options for employee interaction and engagement. Workvivo provides a dynamic workplace communications package for both users and publishers, and on both desktop and mobile. Bringing a consumer-app feel through its activity feed, and with impressive translation options, this will be an attractive option for medium to large companies. Those who are actively seeking to reach all parts of the business, encourage employee conversations and generate online communities among a dispersed audience will also find a lot to like.

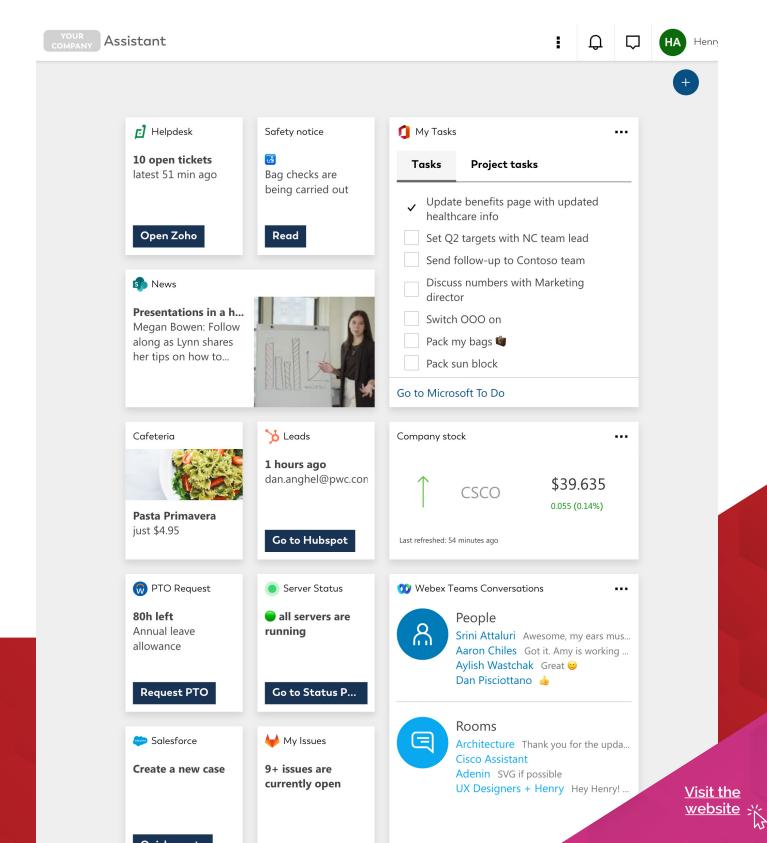




SECTION THREE

PRODUCT OVERVIEWS

## Digital Assistant





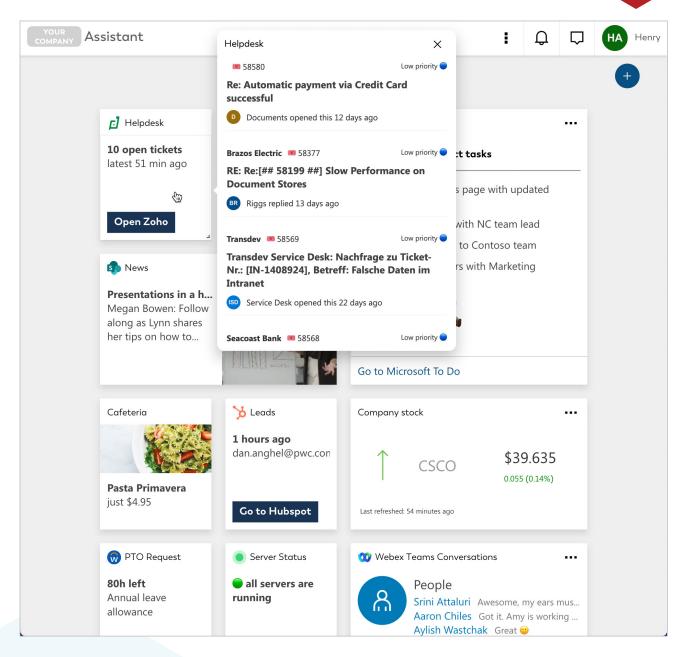
**Digital Assistant by adenin** (headquartered in Boston, USA) is a digital workplace dashboard that combines an at-a-glance view into multiple workplace applications with intelligent chatbot functionality, allowing users to interact directly with connected third-party services. Stemming from a product created for Cisco in 2018, the tool is designed to reflect the 'one place for everything' aspiration that has long been a goal of intranet products. However, as the vendor acknowledges, Digital Assistant is best used alongside an existing intranet, as it doesn't provide traditional intranet elements such as a corporate home page, news publishing or document management. The product is a fully responsive web application and can be used on mobile, for which the chatbot capability is well-suited. However, overall, the card-led dashboard approach is better suited to desktop.

The dashboard is composed of 'adaptive cards' (widgets) that pull information from workplace tools selected from an app marketplace. The user can choose how these are laid out and is able to resize, add and unpin cards to create a personalised view. Currently there are around 100 'ready-to-go' tool integrations. It's possible to amend the cards so that they display information other than that which is brought in by default through API. This is done through the 'adaptive card designer' and involves making a change to the code driving the card. There is little in the way of validation for changes, which makes identifying errors potentially difficult, and some users might find the designer and the need to work with code slightly intimidating, however, the vendor acknowledges that this is an area for improvement and we look forward to seeing how it develops in

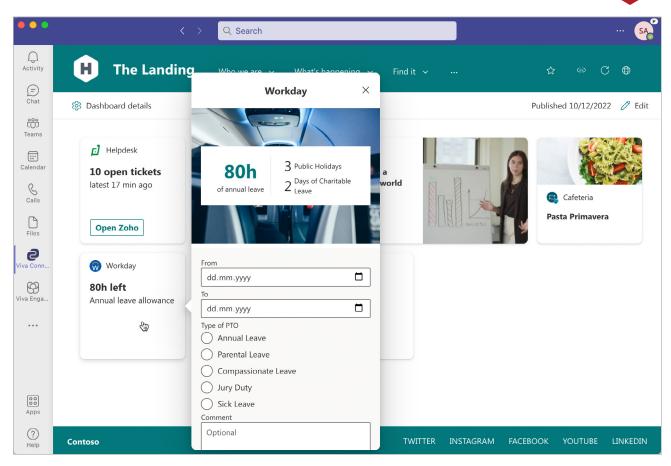
There are integrations available in Microsoft AppSource for Teams and Viva Connections. The ability to create cards within the Digital Assistant and then manifest these in the Viva Connections dashboard will be attractive to those wanting to make good use of their Microsoft investment. Indeed, the whole dashboard can be embedded on a SharePoint page or in a Teams channel, though it might be impractical to pull a particularly busy board into Teams. Cards can also be presented in other channels such as Slack, or a Chrome extension, and admins have access to the 'App Directory' to set this up.

Alongside the main dashboard is a notification panel. This can pull in messages from other systems that are connected to the dashboard but which the user may not want to represent in card format; for example, tools that generate high volumes of notifications. On desktop this area is also where the native chatbot is accessed. The chatbot uses built-in Al that can be trained both to answer key questions and to allow users to instigate actions in connected tools, for example creating a new case in Salesforce, or viewing assigned helpdesk tickets. The bot can make use of any adaptive card that has been set up to provide a response, including lists or forms. As with any bot of this type there's likely to be a significant up-front effort to populate the knowledge bank and configure the integrations, however, it has the potential to be a powerful tool. The chatbot is also provided as a Teams app and provides a similar experience to that in the main tool, such as returning an adaptive card as an answer to a question rather than just a text-based response.

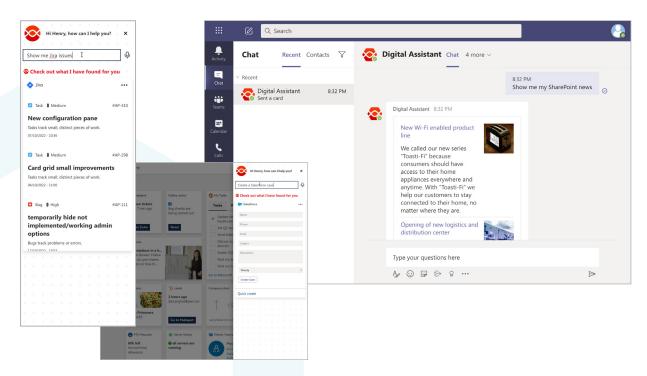
Digital Assistant provides a highly configurable and personalisable space for presenting and interacting with information from multiple systems that typically exist outside of a standard intranet. There is good versatility for integrating cards or indeed the whole dashboard in other channels, notably Teams and Viva. For businesses with employees who regularly need to work across numerous systems, and who want to simplify that experience and reduce context switching, Digital Assistant is certainly worth considering. However, potential buyers should be mindful of the degree of initial configuration likely to be required, particularly for the chatbot. Furthermore, at this price point, we would expect to see a more developed option for bespoke card configuration than is currently provided.



The Digital Assistant dashboard provides a personalised view of integrated third-party services connected via API. Users can layout the dashboard and resize, add and remove cards.

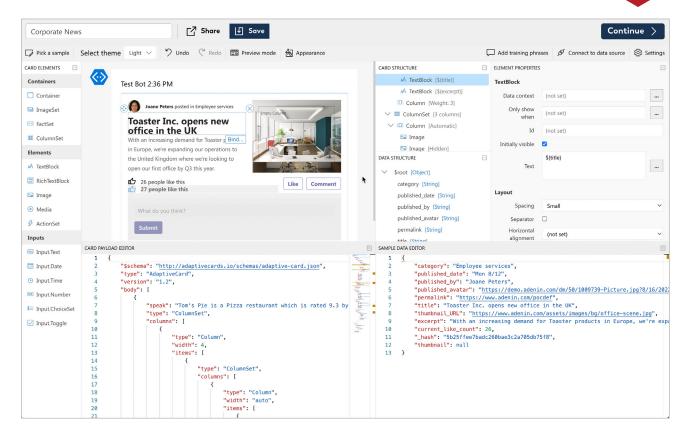


The entire dashboard can be brought into a SharePoint site or Teams, though busy dashboards might not be particularly well-suited to viewing in Teams.



The chatbot can be used in multiple ways, for example, to display particular types of information from connected tools (such as a list of service desk tickets), or to allow the user to interact with a connected service directly (such as submitting a form to create a new case in Salesforce). The chatbot is also available as a Teams app.





The adaptive designer console lets admins make changes to the default data displayed on a card. This involves finding the desired data elements brought in via API and replacing the relevant code in the card.



# Target businesses



# **Product type**



# **Branding opportunities**



# **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

### **PRICING MODEL**

Subscription - price per user per month

### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, government / public sector, multi-year commitments, customers only pay for active users, businesses over 20,000 users. Price includes: Customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, Microsoft 365 set-up, hosting, onboarding user data, access to a community & webinars.

# Base systems



# **Sectors**





# **COMPANY AND PRODUCT**

# Company details



Company adenin



Company founded

1999



Company locations

Boston, MA, USA (HQ); UK; USA



ISO 27001 certified

adenin say they are in the process of obtaining certification.



Typical client size

500 employees



Largest deployment so far

80,000 employees



Partner locations

USA, UAE, China, Australia



### Customers

Clients include: Cisco (USA), Transdev (Germany), please <u>see their website</u> for more.

# Product and technical details

Name of product	Digital Assistant by adenin
Product launched	2016
Current version	Digital Assistant is a SaaS solution, the version demonstrated was accurate as of October 2022.
Accessibility	WCAG 2.1 compliant





### Deployment

Client onpremises Client private cloud Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant Other

### Data residency

USA, UK

### Client data encrypted

In transit only

In transit and at rest

At rest only

# **Authentication supported**

Azure Active Directory	ADFS	Open ID	Oauth	G Suite	Other
---------------------------	------	---------	-------	---------	-------

# Search technology

Apache Lucene/
Solr

Apache Lucene/
Elastic

Microsoft

Vendor's own

Other

# Document library sources integrated

	Вох	Dropbox	Google Drive	SharePoint	OneDrive	Other*
*adapin has a large number of appa qualible in an App Directory						

<sup>\*</sup>adenin has a large number of apps available in an App Directory.

# SharePoint/0365 versions supported (if applicable)

SP Server 2016
SP Server 2019
SP Server Subscription Edition
SP Online
Viva Connections

Mobile app deployment

Google Play store
Apple store
MDM
MAM
Other\*

<sup>\*</sup>Web app (that can be added to a home screen)



### Reverse-out options

The administrator account always retains access on the adenin free plan, so that data can be exported out.

### Languages supported

English, and a localisation tool to translate the UI into other languages.

### Machine translation

Not via the product – it's whatever the browser/base system does

### Right to left script

Yes

# Set-up and support

### Set-up process for new clients

New clients start with the adenin 'Free forever' plan to experiment, try out API connections and create and embed their Adaptive Cards. adenin offer a complimentary service where they liaise with a client to figure out a few key usage scenarios and implement them, to ultimately get executive buy-in. Once a project is underway, adenin offer packages for training and ongoing fulfilment (service centre approach).

# **Product updates**

Once a week.

# Product update process

Most updates get rolled out instantly, but on-premises customers can pull the latest version from a private repo and install at their discretion.

# **Technical support**

adenin offer technical support for all plans (available during USA or UK business hours).

# User community

adenin have an annual virtual customer conference that's free to attend.



# The Company

adenin says: "We're a British-American team that scratched our own itch: we were fed up with intranets turning into an unloved ghost town where nothing ever happens. They seem to be left behind in the cloud age, with integrations far and few between and user engagement at an all-time low. Rather than reinvent the wheel we focused on enhancing what's already there, by connecting disparate sources into one convenient view. We're proud to have our efforts recognized by the Digital Workplace of the Year award 2018, through our flagship implementation at Cisco."

# The Product

adenin says: "Let teams upgrade their existing intranet into a digital employee experience that users will love! Users can easily track data and complete tasks from across all their other work apps in one central, streamlined interface. This ensures your team remains productive and never misses important updates. Designed to be an embeddable experience, the platform extends the functionality of existing intranets, such as SharePoint and Viva Connections. Built to unify – not replace – Digital Assistant focuses on offering dozens of plug-and-play integrations for your 3rd party data, such as Salesforce, ServiceNow, Workday, SAP, Microsoft 365; as well as others from the free App Directory."

# Their view of the marketplace

adenin says: "Our research shows the average employee is actively jumping in-between 36 cloud apps, wasting over a third of their productivity hunting for and aggregating information. Intranets, designed to be a central hub for the user, often suffer from poor integration of 3rd party apps, which contributes to low user adoption and employee engagement. Digital Assistant aims to bust those silos of disenfranchised data, by implementing itself as the bridge that allows a modern comms-driven intranet to be enhanced with live and secure data feeds from all the other workplace apps. This dramatically improves productivity and is proven to increase employee engagement by 17%."



# GreenOrbit (6)





Our Company • Executive Team • Policies Forms • Employee Central • Sales & Marketing • I want to... •

A solution by Knosys





BUSINESS PAGE















### Why turkey prices are at record highs for this Thanksgiving Day

Thanksgiving is next week and turkey prices are at record highs. There are multiple reasons

### After decades of neglect, Jackson's Black business district is coming...

Some cities are investing to revitalize their Black business districts. In Jackson, Mississippi, Farish Street has unique challenges as old an...

### Cryptocurrency exchange FTX files for bankruptcy in another blow to...

It was nothing but sunny days for crypto at this time last year - But those days are long gone and with one of the world's biggest crypto...

### HarperCollins workers are on strike to demand better pay

Employees at HarperCollins, one of the "big five" publishers in the US are on strike. They're asking for better wages in an industry that is...

**Elon Musk says Twitter bankruptcy** 



### REQUIRED READ/VIEW



### HELPEUL LINKS

- → Company website
- → Xero accounting
- → Our CRM
- → Check webmail
- → World time meeting planner
- → Today's weather

### REQUIRED READ/VIEW



### ALL #CHANNELS FEED









**GreenOrbit** is an independent intranet solution, owned by Australia-based Knosys. It's a clean and contemporary-looking product that has a variety of features to offer, which also complements a range of knowledge management and library management solutions from Knosys, (although these solutions are not covered in this review).

The home page design is a simple modular layout that provides the navigation, communication and task elements expected of an intranet in contemporary fashion. There are templates in the layout manager, which administrators have control over to adjust and create to suit their needs. Branding is set up by the GreenOrbit team as part of implementation and isn't something that administrators are able to change. This could be a limitation for teams who want to make more regular changes to the intranet look-and-feel, such as to support seasonal activities.

News is front and centre on the home page via a carousel, with a link to 'submit article' via a simple and clear form interface. Scheduling and pinning are available, as is the ability to @mention and use channel hashtags in articles. Publication and expiration dates can be set too, but there is no mechanism to target news to specific audiences, other than grouping news by content area such as department. This will feel limiting for teams wanting more robust audience targeting control.

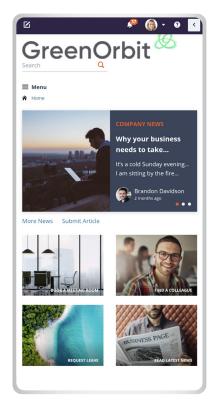
A top right menu gives access to notifications, profile features and 'My Hub', which is the centre of a user's personalised and social experience, driven by the use of @mentions and hashtags. My Hub is a social space that connects people to channels and private groups too, where related content is aggregated (including news articles). Profiles within GreenOrbit are presented via My Hub and in a profile directory, which continues to showcase social features, and administrators have the ability to add and remove profile fields where desired.

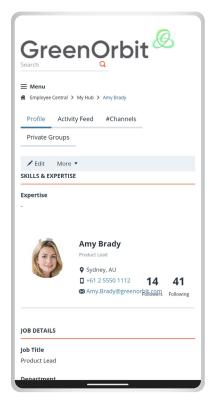
GreenOrbit's required read feature is helpful for compliance challenges. Administrators can target to individuals or groups and push required policy and procedure content to an alert web part on the home page. Everything is well integrated with the notifications system, and results can be exported to Excel. However, the process is reliant on individuals seeing and responding to notifications within the intranet itself, no email push or integration with other systems is available. We think that tools to help administrators follow up on items approaching due date, or overdue, would be a welcome addition.

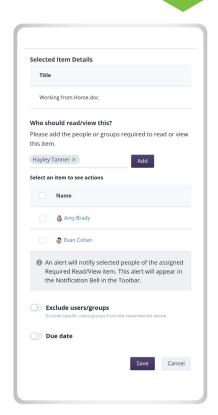
Other notable features are GreenOrbit's form builder and mobile approach. The form builder is available for admins to build, test and publish simple and attractive forms with workflow approvals, which could be useful for frontline workers such as to order uniforms. We would like to see integrations available with relevant back-end products to support the forms feature, however. The intranet is mobile responsive and there is a communication-focused native app available. Content editors can edit their pages specifically for the mobile view within the editor interface; the ability to adjust content for mobile will be highly desired by organisations with a frontline workforce.

Integrations and searching within GreenOrbit are not areas of strength. Integrations with Microsoft 365, Google and other common workplace tools are not available. GreenOrbit search is therefore limited to GreenOrbit content, including the people directory, and the results page is more basic than other examples we've seen.

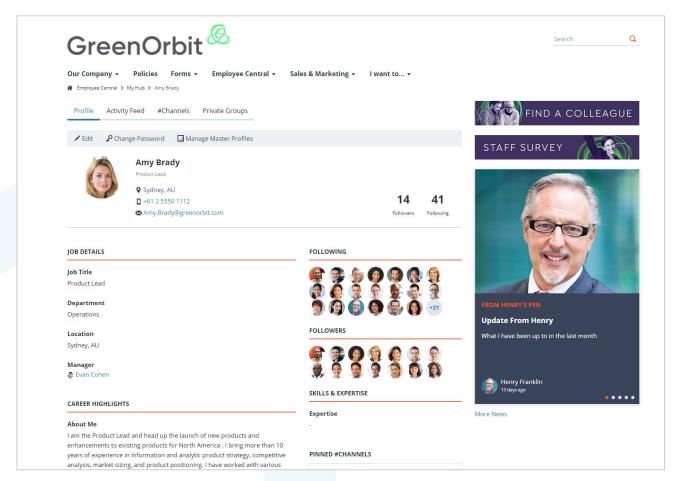
Intranet Teams who want to embrace a more collaborative and social intranet, and for whom knowledge management is a high priority, will get a lot out of GreenOrbit, particularly if they choose to leverage other products in the Knosys ecosystem. GreenOrbit seems most appropriate for smaller organisations where knowledge management is the focus and more complex integrations are not desired. Overall, we like the modern look and the ease of use of GreenOrbit. Its features are well-executed but aren't as advanced as those in other products in this report.





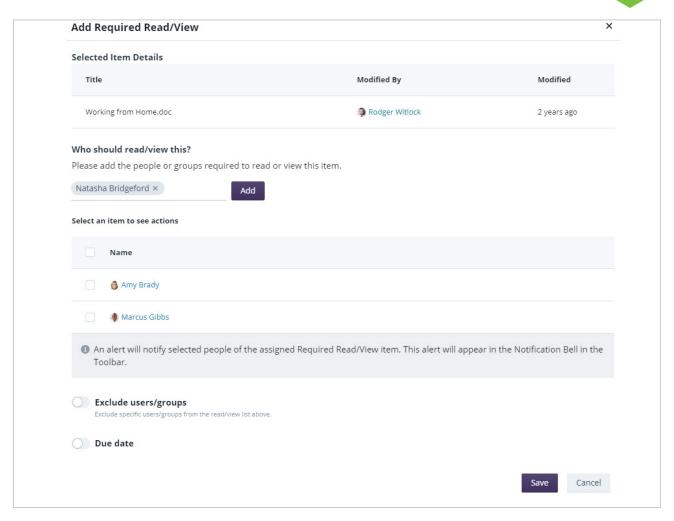


GreenOrbit is responsive, and there is a nice communications-focused app available too.



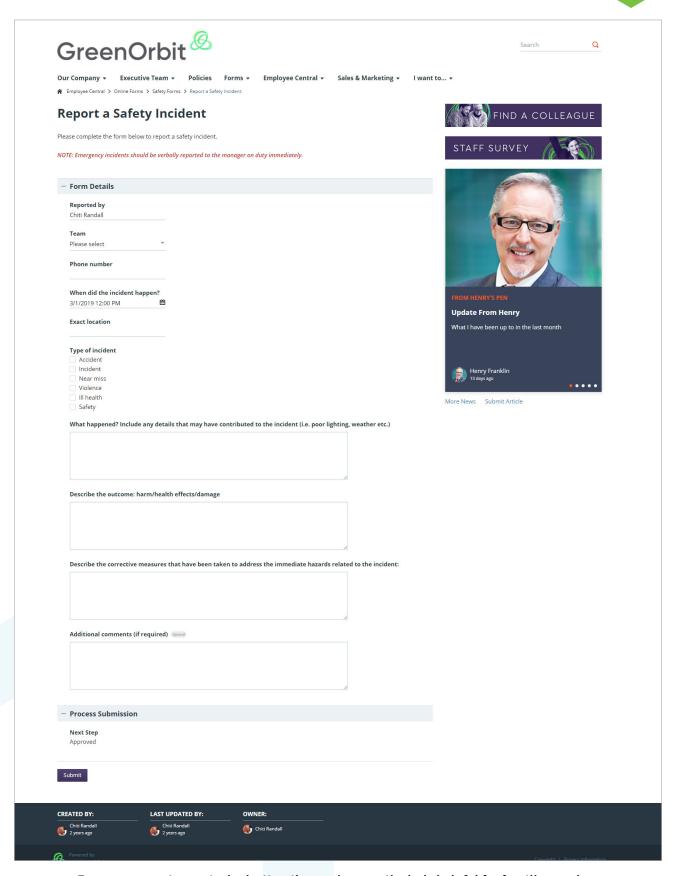
'My Hub' aggregates content and presents profile information in an attractive way.





The 'required read' feature is detailed for admins and easy for end users to use.

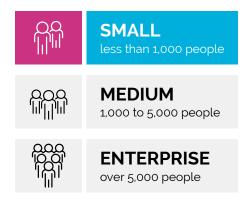




Forms are easy to create, look attractive, and are particularly helpful for frontline workers.



# Target businesses



# **Product type**



# **Branding opportunities**



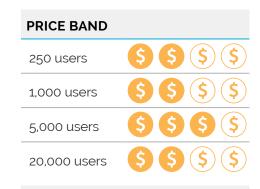
# Base systems



# **Sectors**



# **Pricing**



### **PRICING MODEL**

Subscription – price band based on number of users

### **PRICING NOTES**

Discounts available for: None. Price includes: Training for end users, product support, branding / theming services, editor manuals, updates and upgrades, hosting.

# **COMPANY AND PRODUCT**

# Company details



### Company Knosys



# Company founded

Knosys was founded in 2015, it acquired GreenOrbit in 2019. GreenOrbit (formerly Intranet Dashboard) had been a company since 2003



### Company locations

Melbourne, Australia (HQ), India, Singapore, UK, USA



ISO 27001 certified

No



# Typical client size

500 employees



# Largest deployment so far

100,000 employees, 80 countries



### Partner locations

None



### Customers

Please see their website for details.

# Product and technical details

Name of product	GreenOrbit
Product launched	2003 as Intranet Dashboard, renamed as GreenOrbit in 2019
Current version	2.5 (8 major versions as Intranet Dashboard)
Accessibility	Individual users can change the font size of what they're seeing, Alt text is in use for images, keyboards can be used for navigation



# Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant

Other

### Data residency

N/A

### Client data encrypted

In transit only

In transit and at rest

At rest only

# **Authentication supported**

Azure Active Directory

**ADFS** 

Open ID

Oauth

G Suite

Other

### Search technology

Apache Lucene/ Solr

Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

# Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

# SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

# Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other\*

### Reverse-out options

The site and all content are deleted for cloud customers. For on-premises customers, it is the customer's responsibility to decommission their site and data; however a team at Knosys can assist.

### Languages supported

Site Framework and controls in English, Chinese, Dutch, French, German, Italian, Spanish and Portuguese. Customers can publish content in any language.

### Machine translation

Not via the product - it's whatever the browser/base system does.

### Right to left script

No

# Set-up and support

### Set-up process for new clients

The Customer Success team works with the customer to understand their needs then develop a schedule and project plan for them. There is technical deployment in the cloud or installation on the client's infrastructure. Online training for publishers is provided. Simple styling changes are applied to create a theme that reflects the organisation's corporate colours and branding. Information architecture creation, navigation and site build are offered as additional services.

### Product updates

Quarterly

# Product update process

Cloud customers are upgraded automatically shortly after a product update is released. On-premises customers are upgraded once a year, or on request.

# Technical support

All customers get standard support as part of their subscription fee. Standard support includes access to documentation, tutorials, and 'walk-through' videos. Customers can submit electronic requests or email support directly to log a request for help any time. There is also all day support (Monday to Friday) available regardless of location. Knosys offers a premium support package for GreenOrbit, which has an SLA-based response and resolution regime.

# User community

None



# The Company

Knosys says: "Knosys creates software to empower organisations, providing them with new ways to find, use and share information, which allows them to better deliver to their customers, employees and stakeholders. Alongside the GreenOrbit Intranet platform Knosys has two other brands; KnowedgelQ - a knowledge management platform and Libero - a library management system."

# The Product

Knosys says: "With GreenOrbit, you get an intranet platform that provides all the features you need built in. Centralise all documents, information, knowledge, and communication. Connect employees, build culture, and mobilise people to create, contribute, and collaborate."

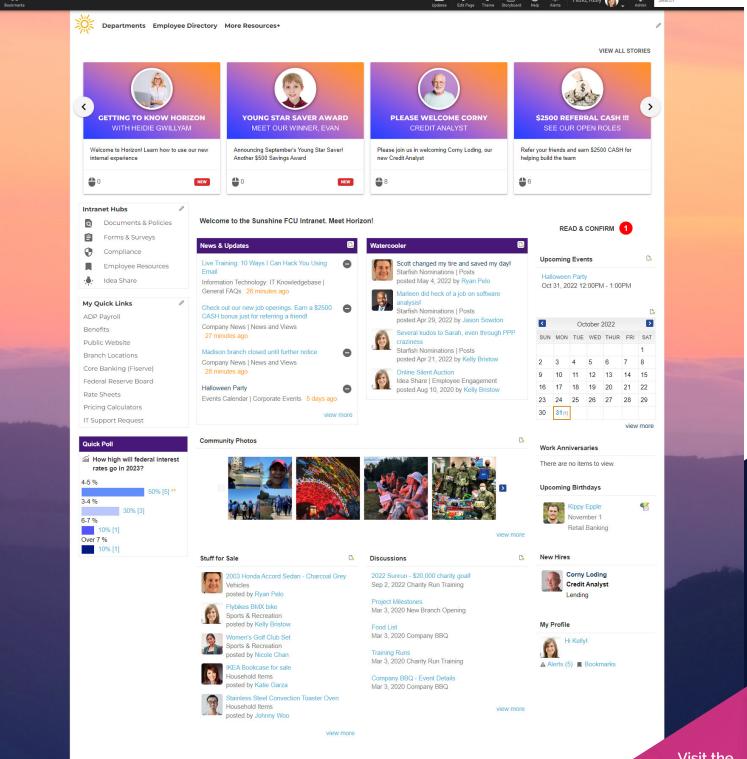
# Their view of the marketplace

Knosys says: "With a hybrid workplace here to stay businesses need a tool like GreenOrbit to connect and engage their staff that is accessible anytime and from any device. The intranet platform must be shown to drive productivity and be able to prove business value through analytics. Cloud-based hosting should be offered as a cost effective and secure option, however businesses should still have the choice to host on their own infrastructure if they so wish, a choice they get with GreenOrbit."





# Intranet Connections





Established in 1999, **Intranet Connections** is a long-standing independent intranet solution that is based in Vancouver, Canada. Included in the low price are a variety of practical features that support smaller businesses, particularly those who want a simple approach to an intranet and digital tools without multiple business systems. The user experience is good and there are a range of fine-grained controls for admins.

The top-menu navigation approach is flexible, including a mega menu with icons or with an embedded content widget, and is accessible across the site but respects people's access permissions. Site sub-menus are presented in widgets on subsequent landing pages, we found it isn't always clear the widget includes content for that site but we did get used to it. Home and landing pages are created using drag-and-drop from a large library of widgets, such as a quick poll or photo slider, which is a good example of the effective in-context admin tools.

Intranet Connections has a focus on practical tools that are simple for admins to create and for people to use. Examples include forms with dynamic fields and configurable workflows, tests that can be used for training purposes, and FAQ pages displayed in a discussion-board style of topics. People-oriented features include suggestion boxes and nominating colleagues via a social feed approach. Alerts, notifications, and approval requests can be found in a personalised dashboard, which works well and helps people manage activities.

Reference material is typically stored as documents in a folder structure, which people can preview without having to download. The history tracking available for admins is strong, including the facility to add notes when something has changed. Files can be set as mandatory and acknowledgements are logged in the history; we like the facility to re-send mandatory read prompts cyclically, such as a year after publication. The

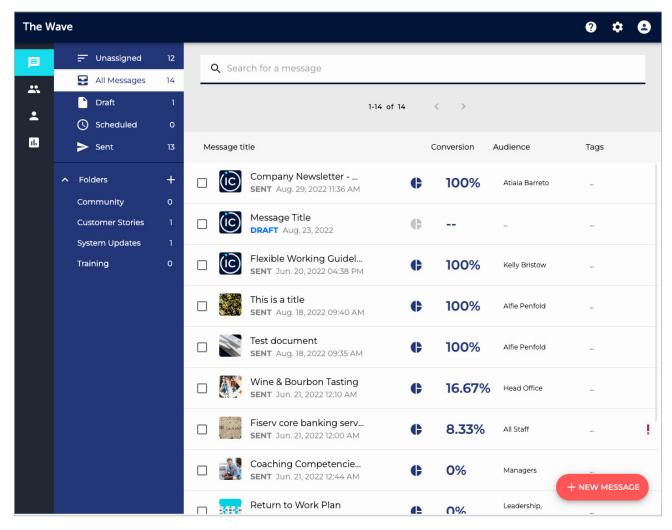
content of files is indexed in the search, including PDFs, and analytics include search data. People search is best handled via the dedicated directory; people can update their profiles where wanted, including to add a job description, social media links, and skill tags from a centrally managed database. The search overall is effective, with helpful tabs and filters, summaries, and a breadcrumb trail shown in results.

The experience for internal communicators is a little basic when compared to others in this report. A rich text editor creates simple articles, and news is presented as a feed in widgets where people see news based on their associated folder permissions. A 'storyboard' widget on the home page allows publishers to feature news in a more engaging manner by pasting a link (from the intranet or internet) into a simple form. The presentation of the storyboard is more visual than most other widgets, which we like. Similarly, a push 'messages' feature, called 'push communications extension', allows publishers to send short communications or even newsletters via simple form to end-users' preferred channel, including email, SMS, Slack and MS Teams. Audience creation, content creation, and analytics are managed via a second admin console, separate from the intranet. The storyboard and 'push communications extension' functionality and concept feel more contemporary, and we hope the rest of the platform will follow suit.

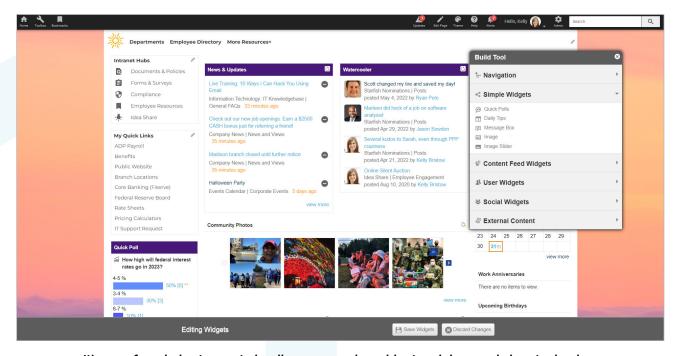
Overall, Intranet Connections offers small companies a practical tool to help with business processes and knowledge management. Admin tools are effective, providing a simple but effective approach that doesn't require technical skill. However, there is no mobile app available (although it is responsive), there aren't many integrations with third-party solutions, and the tools for communicators aren't as fully featured as other solutions we've seen. There are indications of advancement though, including to the interface in the form of the push communications extension and 'storyboard', and we're looking forward to seeing how this evolves in future.







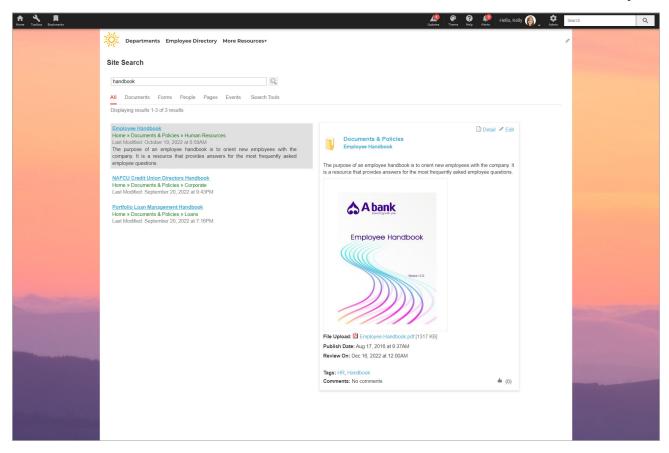
Message creation, management and tracking works very well in an attractive interface.



It's easy for admins to create landing pages using widget and drag-and-drop technology.



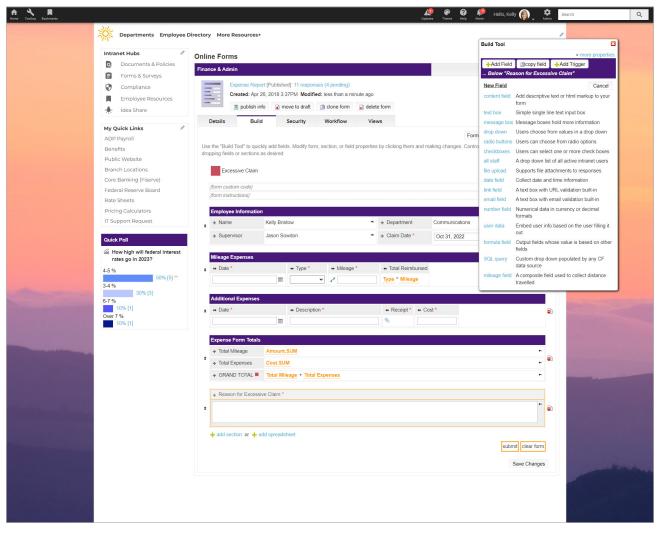




The search returns a good range of data and can be effectively filtered. The first result is previewed too, which is a helpful feature for the most likely result.





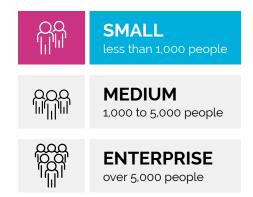


Intranet Connections includes a variety of practical tools, such as this form builder.





# Target businesses



# **Product type**



# **Branding opportunities**



# **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	Software not deployed to more than 5,000 users
20,000 users	Software not deployed to more than 5,000 users

### **PRICING MODEL**

One-off payment and ongoing maintenance fee, Intranet Connections does not charge for user growth.

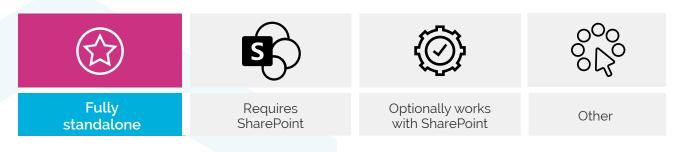
### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, Multi-year commitments, Loyalty (repeat business), on-premises hosting.

Price includes: Training for admins,

Price includes: Training for admins, customer success services, maintenance, product support, updates and upgrades, hosting, access to a community & webinars, unlimited phone & email support.

# Base systems



# **Sectors**







# **COMPANY AND PRODUCT**

# Company details



# Company

**Intranet Connections** 



# Company founded

1999



### Company locations

North Vancouver, BC, Canada. Intranet Connections are physically located in Canada with staff members in the USA where 80% of their customers are based



### ISO 27001 certified

No



# Typical client size

150 and 800 employees



# Largest deployment so far

5,000 employees multi-state



### Partner locations

None



### Customers

Clients include: OUCU Financial, SharePoint Credit Union, Child & Family Resources, Transit Police, Sun Peak Resort, Wyandot Health Network, Summit Funding, Florence Bank, Smythe CPA, Point Breeze Credit Union

# Product and technical details

Name of product	Intranet Connections
Product launched	1999
Current version	15.5
Accessibility	Alt text is in use for images





### Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services

Vendorhosted Microsoft 365 tenant

Other

### Data residency

Canada, USA

### Client data encrypted

In transit only

In transit and at rest

At rest only

### **Authentication supported**

Azure Active Directory

**ADFS** 

Open ID

Oauth

G Suite

Other\*

'Anonymous User, Form Login (username/password), SAML SSO providers: e.g. Okta, Autho, Shibboleth can be configured

# Search technology

Apache Lucene/ Solr Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

# Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

# SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

# Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other\*





### Reverse-out options

Database and file backups can be provided from cloud. For self-hosted, customers can continue to use the on-premises features but will lose access to support and cloud services. If customers pay back maintenance later, they can regain these.

### Languages supported

English

### Machine translation

No

### Right to left script

No

# Set-up and support

### Set-up process for new clients

Intranet Connections perform the installation, whether it's on-premises or hosted in their cloud. They handhold through any integrations such as Active Directory, or communication channels like 365, Teams or Slack. Intranet Connections configure appropriate email delivery and authentication / security configurations based on needs.

# **Product updates**

Major releases 1-2 times annually. Patches with fixes / improvements between those.

# Product update process

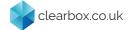
For cloud services, all customers are updated at the same time with prior communications. For onpremises services, communications are sent in product to admin and other channels and customer controls timing of deployment.

# Technical support

Technical support standard hours are between 7 am and 5 pm PT via unlimited phone and email support. Technicians conduct screen sharing sessions, provide help articles and even recorded walkthroughs.

# User community

None





# The Company

Intranet Connections says: "Intranet Connections (IC) helps community-focused organizations build high performing, connected cultures since 1999. Our powerful platform offers extensive functionality to address modern communications challenges and our passionate team brings an even deeper commitment to your success. From onboarding to execution, we're the partner you've been hoping to find."

# The Product

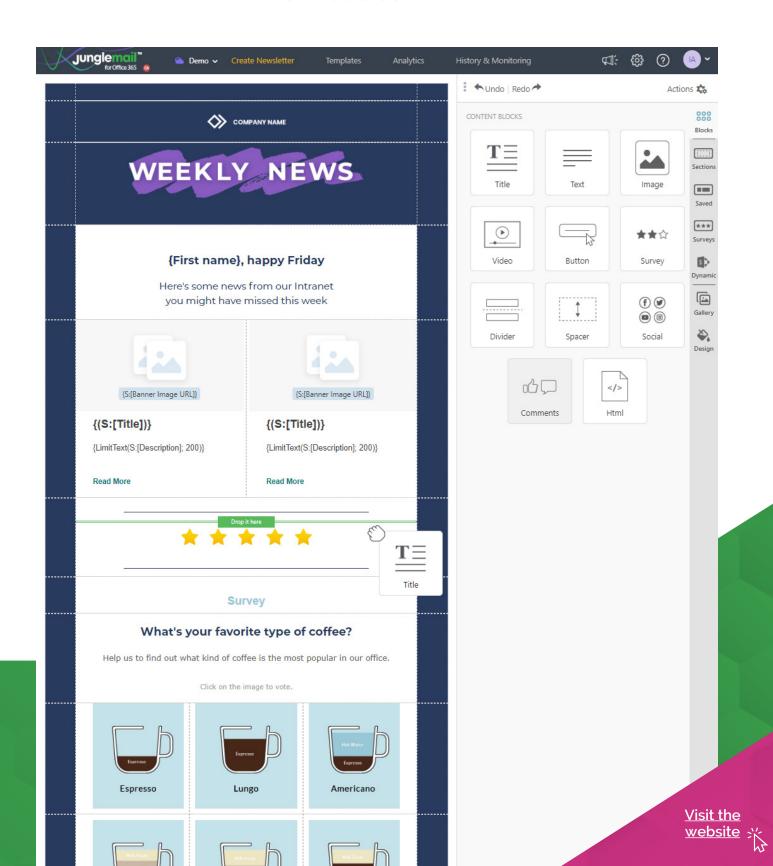
Intranet Connections says: "Intranet Connections creates intranet software that allows organizations to connect their employees to a centralized platform to organize internal documents, share organizational news, and improve employee experience and engagement. Our intranet also provides customers with the ability to message employees across multiple channels. In addition, our in-house teams are experts in the field of internal communications, and provide best practices, resources, advice, and educational programs to our customers."

# Their view of the marketplace

Intranet Connections says: "Regulated organizations often struggle to provide a simple and engaging employee experience among the stresses of their industries. IC lets employees feel informed, connected, and valued in their roles. We help free IT resources from management as it's built for business users."



# Junglemail\*\* for Office 365





JungleMail, provided by Lithuania-based EnovaPoint, is an email newsletter tool primarily built to work alongside M365 and SharePoint intranets. Its main focus is on creating newsletters using content pulled dynamically from existing SharePoint communication sites, and it offers an impressively versatile set of options for constructing newsletters within a nicely styled and well laid-out administration interface. It's worth mentioning that JungleMail can send email to external audiences and make use of contacts stored in SharePoint lists for this purpose. It's unlikely that SharePoint content would be utilised in such instances; however, content can be created directly within the product and there is enough effective functionality for this to be a useful feature.

The product takes advantage of existing M365 functionality, instead of trying to replicate or replace it, as well as drawing on real-time M365 data and content rather than storing mailing lists or synchronising content locally. A connection with SharePoint is created by adding the JungleMail app to a SharePoint site; when it's opened within SharePoint a new communication site entry is created in JungleMail. This is where admins create newsletters and configure distribution settings. Alternatively, admins can create a new communication site (web type) directly in JungleMail, and subsequently activate a connection back to SharePoint.

Newsletter recipient data comes from sources including Active Directory, Exchange groups, SharePoint lists or CSV upload, and there's a connector available with Dynamic CRM. Mailing lists can't be set up within the tool; recipient data is instead compiled

outside the system and then brought in when required for email distribution. Azure AD or Exchange connectors are the preferred way to manage internal recipient lists, with CSV or SharePoint lists the options for external recipients. You can't combine recipients from multiple sources in a campaign but multiple groups from the same source can be used for internal communication. JungleMail has its own built-in mail server which is suited to larger mailings. The product can also use any authorised M<sub>3</sub>65 account to act as the sender, however, with Microsoft limiting mailing speeds, this method is best used for sending to 5,000 recipients or fewer in a single mailing. JungleMail can also use an SMTP server.

The product's standout feature is its versatility for laying out newsletters. These can be based on an existing template or created in situ and the design saved for future re-use. 'Sections' are the main template building block - individual, tailorable components which can also be created afresh, also with the option to save them for later use. The SharePoint connection comes to the fore when using 'dynamic sections' which pull in content directly from a SharePoint communication site. In any section, the publisher is able to tailor how content is presented – for instance, editing titles or summaries that have been pulled in from the existing SharePoint article.

By using dynamic sections in tandem with the scheduling function, a news digest can be created and distributed automatically. A pre-configured template pulls in content from a SharePoint source and then uses assigned Active Directory groups (in real time) to drive distribution. As sections are displayed



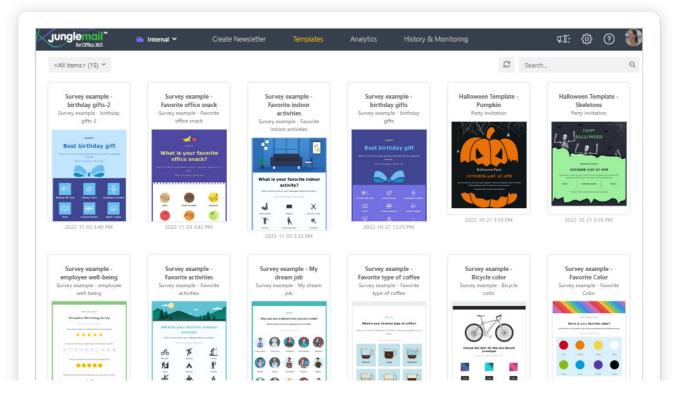
based on a recipient's access rights, a single digest could be set up to cater for multiple audiences. With any automation of this sort, publishers and admins will need to be diligent when configuring the template. However the flexibility it offers it will be an attractive option for busy internal communications teams.

There's a simple workflow to send a newsletter, and we liked that both a desktop and mobile preview of the mailing are provided. Once the email is sent, JungleMail compiles a report which includes standard email metrics such as open, click-through and bounce rates, poll results if applicable, as well as a reading device breakdown. Additionally, through the connections with Active Directory, report data can be segmented by elements

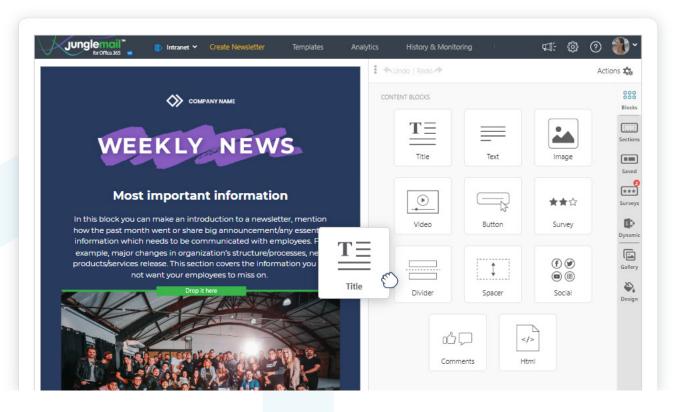
such as job title, department and location. This information is presented in a reporting dashboard and the data is all exportable.

Email remains a fundamentally important communications channel for many businesses. JungleMail will appeal to SharePoint-focussed communications teams looking to simplify how they generate and distribute messaging, maximise value from their existing SharePoint content, and provide consistency in communications. Additionally, an attractive price point makes this an option well worth considering when assessing third-party mailing tools, especially as licences are on a per publisher basis.



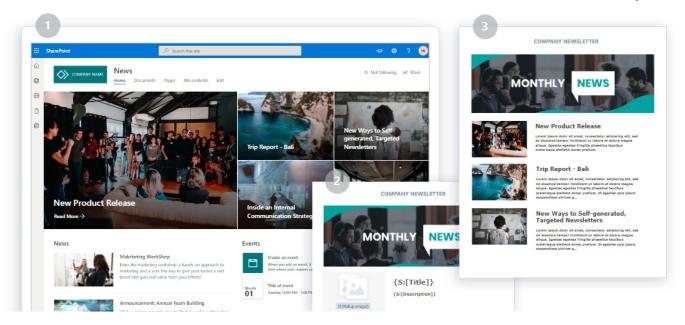


Within the communication site, publishers can choose to begin compiling their newsletter by selecting from a set of existing templates or start a fresh one from scratch.

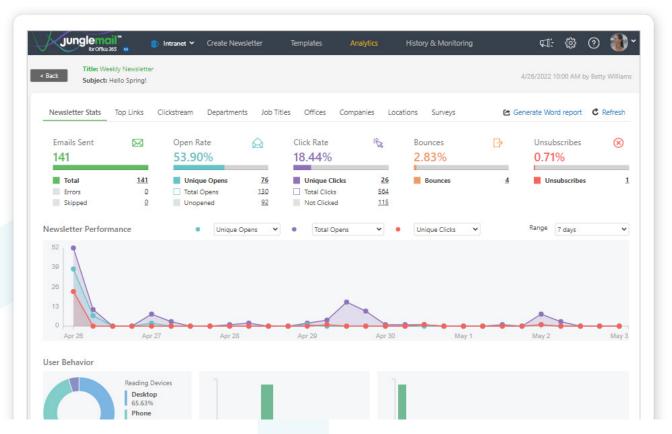


The interface for compiling a newsletter provides a wide range of options for publishers, including the ability to configure finer details such as the default character count in Title or Summary fields. Layout is primarily controlled using 'sections' which are highly configurable. 'Dynamic Sections' are used to draw content from associated SharePoint communication sites.





As part of the workflow for sending a newsletter, publishers can see a preview of the newsletter in a helpful 'device' view. These are scrollable, allowing the publishers to see the full newsletter as it would be seen by recipients on their selected device.



The reporting dashboard includes a variety of standard metrics such as open, click-through and bounce rates. Through connections with Active Directory, data also can be segmented by elements such as job title, department and location, and all data is exportable.



# Target businesses



SMALL

less than 1,000 people



**MEDIUM** 

1,000 to 5,000 people



**ENTERPRISE** 

over 5,000 people

# **Product type**



# **Branding opportunities**



# **Pricing**

# PRICE BAND 250 users \$ \$ \$ \$ 1,000 users \$ \$ \$ \$ 5,000 users \$ \$ \$ \$ 20,000 users \$ \$ \$ \$

### **PRICING MODEL**

Subscription - price band based on number of employees (unique recipients) and feature set (Standard, Pro, Enterprise)

### **PRICING NOTES**

Discounts available for: Charities and nonprofit organisations, schools and educational institutes, multi-year commitments Price includes: Training for end users, customer success services, maintenance, product support, updates and upgrades, access to a community & webinars, consulting services

# Base systems



Fully standalone



Requires SharePoint



Optionally works with SharePoint



Other\*

\*Requires Microsoft 365

# **Sectors**



Teaching and education



Healthcare



Public services, government and administration



Property and construction



**Energy and utilities** 



# **COMPANY AND PRODUCT**



### Company EnovaPoint



# Company founded

2011



### **Company locations**

Vilnius, Lithuania



ISO 27001 certified

Yes



# Typical client size

2,000 – 5,000 employees



# Largest deployment so far

100,000 employees / unique recipients



### Partner locations

Belgium



### Customers

Clients include: Metro Vancouver, Emporia State University, GateGroup, Republique et canton de Geneve, Spar, Optus

# Product and technical details

Name of product	JungleMail for Office 365
Product launched	2015
Current version	2022 December
Accessibility	Alt text is in use for images



### Deployment

Client onpremises Client private cloud Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant Other

# Data residency

Customers can choose one hosting location: USA, Canada, Australia, UK, Netherlands (EU)

### Client data encrypted

In transit only

In transit and at rest

At rest only

### **Authentication supported**

Azure Active Directory ADFS Open ID Oauth G Suite Other

### Search technology

Apache Lucene/ Apache Lucene/ Microsoft Vendor's own Other\*

# Document library sources integrated

Box Dropbox Google Drive SharePoint OneDrive Other

# SharePoint/0365 versions supported (if applicable)

SP Server 2016 SP Server 2019 SP Server Subscription Edition SP Online Connections

Mobile app deployment

Google Play store Apple store MDM MAM Other\*

<sup>\*</sup>There is no native app.



<sup>\*</sup>Search is used for sourcing content and finding previously sent newsletters.

#### Reverse-out options

According to their data retention procedure, the customer account is marked for deletion if the customer is inactive for 6 months (expired or cancelled subscription, and subscription wasn't renewed in 6 months after the last active subscription period's end date). Customer data remains in backups and are removed depending on the SQL backup retention policy. On customer's request, their account can be marked for deletion earlier (manually). No customer data is stored in non-electronic format.

#### Languages supported

The interface of the tool is only available in English. However, users can change the language by using web page translation service available in the browser.

#### Machine translation

Not via the product - it's whatever the browser/base system does

#### Right to left script

Supported with some limitations.

# Set-up and support

#### Set-up process for new clients

A Microsoft 365 Tenant Administrator signs into the <u>JungleMail 365 app</u> and chooses the data hosting location. After the customer account approval, admins will activate the connections that will be utilised by JungleMail users (Azure AD, SharePoint, Exchange connections), configure the features in JungleMail settings (sending accounts, archive, analytics segmentation, etc.), and set up permissions for users. Typically, EnovaPoint offer assistance and guidance via Teams (up to 90 minutes) with the connection activation and JungleMail configuration according to the customer needs.

#### Product updates

Continuously, 1-2 times per month on average.

#### Product update process

All customers updated at once on a particular hosting location during out of office hours.

#### Technical support

Technical Support is provided from 01:00 am until 04:00 pm EST, Monday-Friday.

#### User community

No



# The Company

EnovaPoint says: "We believe in best product we are creating for our customers, not in best marketing."

## The Product

EnovaPoint says: "JungleMail is an internal communication and employees engagement solution for Office 365. Its synergy with SharePoint and Office 365 offers powerful functionality that allows users to build, send and automate newsletters and surveys."

# Their view of the marketplace

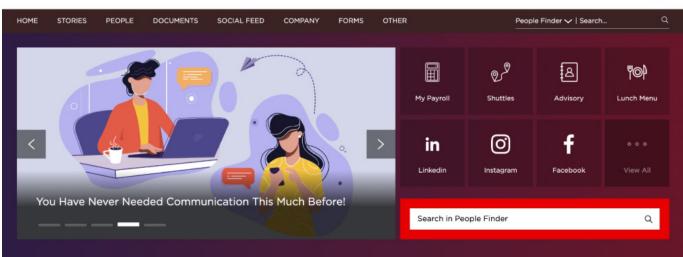
EnovaPoint says: "The main purpose of JungleMail 365 is to improve employees' communication and engagement with an effective internal newsletters and surveys. With direct Azure AD communication, automatic newsletter content population from and to SharePoint Intranet, JungleMail sets new efficiency and best practices standards for company internal communication. In addition, JungleMail offers a rich set of analytical data: Opens & clicks, Top links, Click Path, Surveys and polls results, Ideas & comments sharing, read time, reading devices, and segmented analytics by Job Title, Department, Office, Company, and Location."

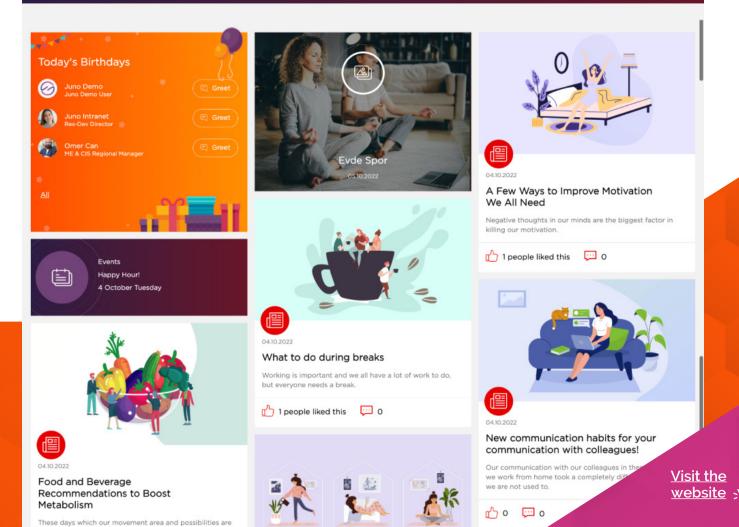


# juno











Juno is a SharePoint-based, mobile-first intranet product that was launched in 2018 by Istanbulbased OGOO Technology Agency. It is an effective combination of native mobile apps for iOS / Android and a SharePoint application-based back end. Installation is a straightforward process that OGOO says can take as little as three hours for SharePoint Online. An installation wizard takes customers through the process with little involvement from the vendor, although they do have customer success teams that can help with any issues. The wizard guides customers through applying their logo and brand colours to their new intranet, as well as setting up user and security groups.

The mobile user experience is good, all functions are accessible via a hamburger menu while the most used features are shown on a tab menu at the bottom of the screen. Tab menu and full menu icons are nice and big, with good icons and text labels. All these functions are accessible from the desktop experience as well which is a perfectly pleasant, if simple, layout. Navigation on desktop is via the standard top menu, which is a straightforward set of links to different areas of the intranet.

Notifications are an important part of the tool for delivering relevant messages to employees. Employees are able to customise most notifications in the app, with the exception of mandatory reads that auto-send reminders when someone hasn't acknowledged a post. Most Juno features (news, videos, events, praise etc.) send notifications to employee groups, which are based on and can aggregate active directory groups into areas like frontline workers. Juno can add users that don't have corporate email, further supporting frontline workers.

News publishing uses SharePoint's discussion board feature and there is a simple form-based

approach to publishing a new news story that works reasonably well. Admins choose the kind of story they want to post and then fill in publishing details including dates and body text via a rich text editor. We like the visual approach to available tags that makes it easy to use and add to content. Notifications can be sent to the mobile app and also to a predefined Teams channel that the vendor recommends setting up specifically for Juno news. Reference pages are published using SharePoint classic templates which provide fairly basic options for layout.

Employee engagement is well covered through news comments and likes, and there is a social feed that allows any employee to share content with colleagues from their mobile app. Employees can post simple text updates, links, pictures and embedded videos. Employees can award each other badges for a job well done through a 'Praise' feature. Admins can configure badges so they represent company values, for example, and can limit the number each employee sends. An accompanying star rating seems a little superfluous but fortunately it can be turned off, as can the ability for employees to request ratings from colleagues.

Search is available for the documents area of the application, simply looking at a SharePoint document library. For news and other content types employees are limited to filtering the activity feed based on tags and categories. People finding is a bit broader, allowing free text search for name, email, job role and department. We like the 'Expert Finder' that allows employees to search or navigate down the organisation structure to find people with particular skills or expertise. Profile pages are nicely presented with information about the employee from active directory or SuccessFactors that can be added to in Juno. If Teams is available you can start a chat



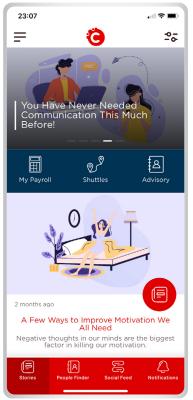
from the app.

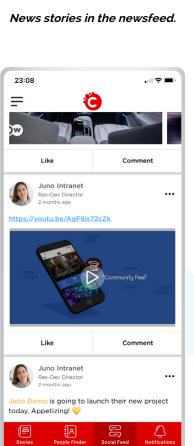
Analytics is a basic one-page dashboard in Google Analytics data studio. OGOO also sends a helpful quarterly report to customers that goes into more detail and provides some commentary around adoption, along with some recommendations for improvement. Mandatory reads are included with reporting in the admin interface. Integrations are basic, but Juno has got a Teams app that customers use to show the whole intranet in Teams desktop and mobile. Juno have done custom developments for clients

however, such as a payroll integration with SuccessFactors that allows employees to see their payslip.

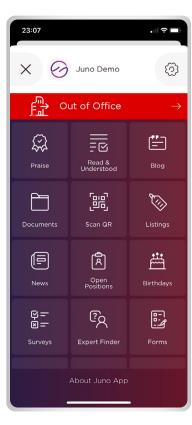
Overall Juno would suit organisations that want to take a mobile first approach to their intranet, where desktop access is less of a priority. The desktop experience is acceptable but basic compared with other SharePoint based intranet products. Juno is very competitively priced though, so for organisations that have modest needs and an equally modest budget, Juno is worth a closer look.



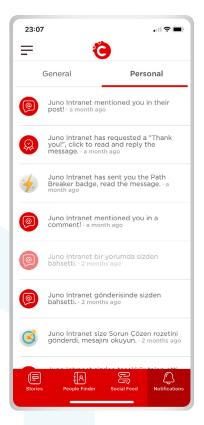




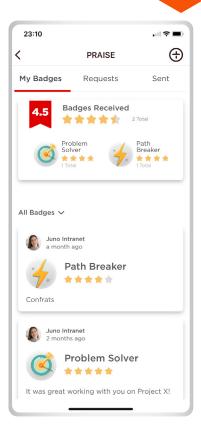
The social feed is where employees can share their own news.



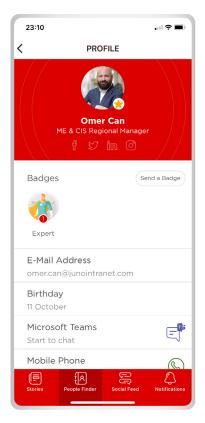
Juno's navigation has nice large and clear buttons.



Mobile notifications are attractively displayed and easy to action.

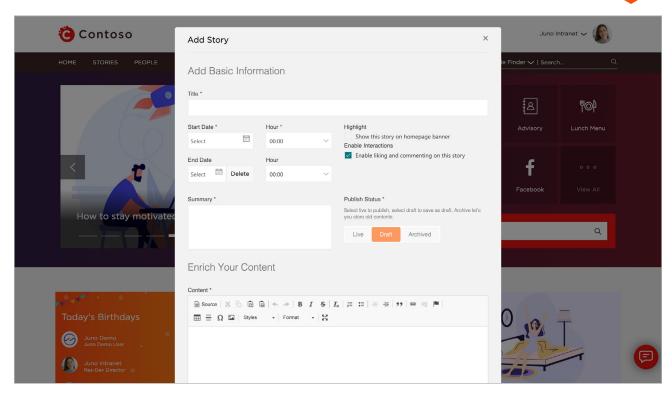


Badges can be aligned with company values and awarded to colleagues.

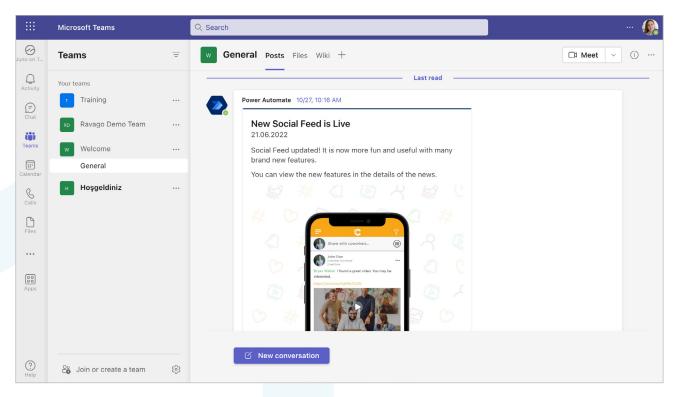


People profiles include helpful links and display any badges the person has earned.





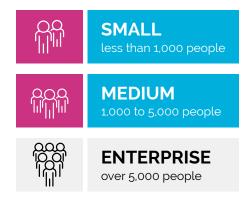
Juno's easy-to-use news publishing.



News notifications can be sent a predefined Teams channel.



# Target businesses



# **Product type**



# **Branding opportunities**



# **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

One-off payment and ongoing maintenance fee, price band based on number of users

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, healthcare, frontline users, multi-year commitments, businesses over 20,000 users, SP online deployments
Price includes: Training for admins, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, Microsoft 365 set-up, onboarding user data, access to a community & webinars, consulting services

# Base systems



# **Sectors**





# **COMPANY AND PRODUCT**

# Company details



Company

OGOO Technology Agency



Company founded

2011



**Company locations** 

Turkey, Istanbul (HQ), USA



ISO 27001 certified

Yes



Typical client size

250 to 5,000 employees



Largest deployment so far

15,000 employees



Partner locations

UK, Azerbaijan



#### Customers

Clients include: SOCAR, ISUZU, OPET, Kapital Bank, LOGO Software, YTONG, AGT, Fuga Furniture, Zorlu Holding, P.I. Works

# Product and technical details

Name of product	Juno Intranet
Product launched	2018
Current version	2022-Q3
Accessibility	There are no accessibility features at present.



#### Deployment

Client onpremises Client private cloud

Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant

Other

#### Data residency

N/A

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active Directory

ADFS

Open ID

Oauth

G Suite

Other\*

\*NTLM / NTLMv2

#### Search technology

Apache Lucene/ Solr

Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

# Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

# SharePoint/0365 versions supported (if applicable)

SP Server 2016

SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

#### Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other\*

<sup>\*</sup>Juno Hybrid Enterprise App Store (SP site app store solution that hosts the company's apps on their tenant or farm, note that this is at additional cost).



#### Reverse-out options

Data stays on the SharePoint site collection.

#### Languages supported

All languages supported by Microsoft are available in SharePoint pages. For Juno's end-user experience, Latin alphabet languages are supported.

#### Machine translation

No

#### Right to left script

Yes

# Set-up and support

#### Set-up process for new clients

OGOO start with an onboarding meeting which describes the whole process, plus arranges governance training. The setup takes an hour. OGOO offers a 3-month intensive care program to support customers to roll out their platform with the best practises.

#### **Product updates**

Every 3 months, OGOO releases free updates and new features. Some of the new features are subject to a payment but most of them are free for ongoing subscriptions. OGOO lists all the released, planned and work in progress artifacts on their website.

#### Product update process

Customers who have the enterprise plan decide if they want an update or when they want to apply it. For those who run on a cloud plan, they select an available slot on the timeframe given by OGOO. Updates take 30 minutes to install.

## Technical support

OGOO are working with an SLA of 8 hours a day over 5 days a week. Juno HQ is located in Turkey, Istanbul, which serves to EMEA customers. An office located in USA serves America with same SLA.

#### User community

None



# The Company

OGOO Technology Agency says: "OGOO, as a Microsoft partner with Collaboration & Content expertise, offers integrated SharePoint Intranet solutions on a single platform. Additionally, the company provides solutions to digitalize business processes using SharePoint Online, Microsoft Power Apps, and Power Automate."

# The Product

OGOO Technology Agency says: "Juno is a ready-to-use Intranet solution. It provides easy and fast digitization of companies' IT, HR, and Corporate Communication processes with experience packs and various ready-made functions running on the web and mobile applications. Thus, it provides companies to communicate interactively with their employees regardless of time and place. With Office 365 and SharePoint subbase, you can always keep Juno up-to-date. It is also a platform where employees interact and socialize. They can enjoy the Employee App, where both work and fun. So, it is time to switch to the Digital Workplace with Juno!"

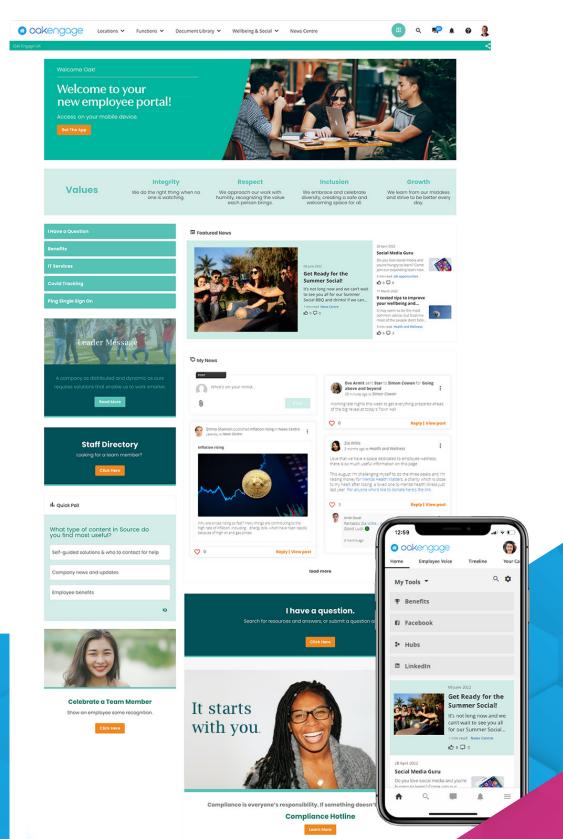
# Their view of the marketplace

OGOO Technology Agency says: "Companies with low employee engagement have problems with loyalty and productivity. In order to improve employee loyalty, HR, Corporate Communication, and IT departments have some struggles. Boosting employee engagement and evolving company culture is easier with Juno, as it solves the pain points of these departments."



Visit the website







Oak Enterprise is an independent intranet platform, owned by UK-based Oak Engage. The company was founded in 1999, and their experience is clear in Oak Enterprise's flexibility and excellent user experience across desktop and mobile. To begin, new users are taken through a welcome tour, which is configurable by admins. The home page too can display a welcome message within an 'applet' (Oak's version of widgets or web parts) to welcome new people, or admins may create a 'new starter home page' to ease people into the business. Home pages are simple to create, with a good range of configurable applets to drag-and-drop to build a page as wanted with desired branding.

Creating individual pages mirrors the home page creation process with applets, although publishers may start with templates if wanted. There are applets to help with presenting complex information, such as accordions, and we like the stock media integration to help create attractive pages. Topics help theme a page, while tagging aids search, and there are publishing and expiry date settings. Setting the article as 'must', 'should' or 'may' read enters the page into a 'smart delivery' system for specified audiences. For example, a 'must read' item will generate notifications, position the article prominently, and prompt the audience to mark they've read something. We think it would be helpful to restrict which publishers can set something as 'must read' however (and this is on their roadmap). Other administration tools are very flexible, however we found screens for managing the structure of the intranet and associated features somewhat confusing at first.

One notable user experience differentiator that we particularly liked was the search experience. The search bar is persistent but when clicked a panel pops-out; whatever was originally on screen continues to display

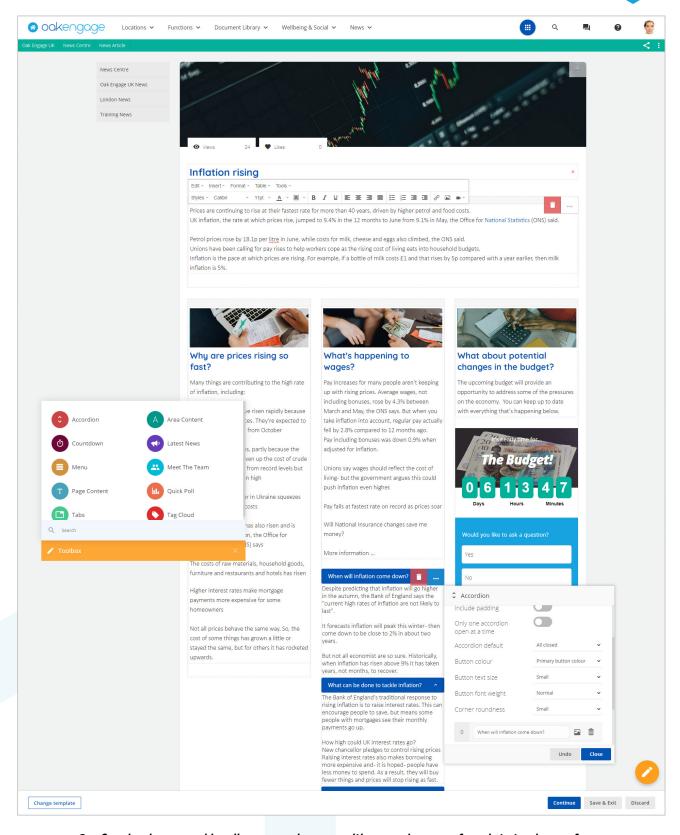
attractively to the left of the pop-out as the whole experience is responsive. The search shows trending content before a term is entered; result types have icons to differentiate them, and federated search results are shown within tabs of origin (such as SharePoint). When a result is clicked it opens in the left-part of the screen, keeping the search results query intact for further exploration.

The people search works in the same way, all profile fields are searchable and profile pages open next to the search pop-out. Alternative spellings are supported and there is a simple org chart too.

For the individual, their profile page is where they can subscribe to news topics, access content they're responsible for, and access practical features such as tasks, expenses, or events. We like the 'send a star' recognition feature and look forward to the gamification surrounding this, which is on the roadmap. There is also a configurable 'awards' feature that captures and displays nominations, but we'd like to see more management tools built-in to make this even more valuable. The chat feature is also notable. It is available from the top menu and is particularly helpful for frontline teams on mobile.

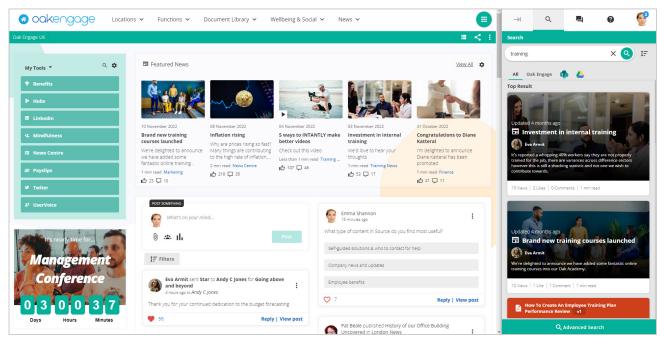
Oak Enterprise is highly configurable with a variety of optional paid-for modules to extend its functionality even further (such as facilitating expenses claims and absence management). This makes it appealing to smaller businesses that may not have the same range of dedicated business systems as larger or complex organisations. Oak Engage says they also target and work with a number of "blue-chip enterprises". Overall, the excellent price point, pleasant user experience, and all-round flexibility make it a product that's worth exploring.



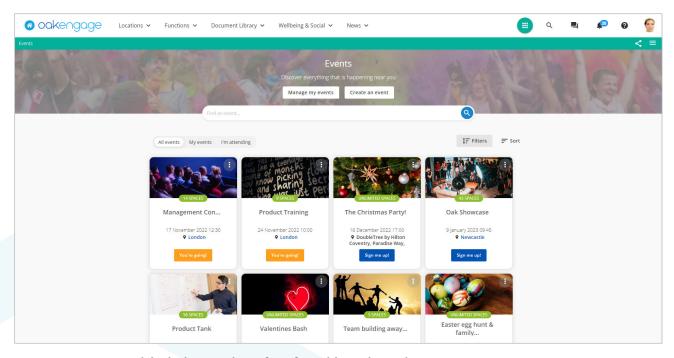


Configuring home and landing pages is easy, with a good range of applets to choose from.



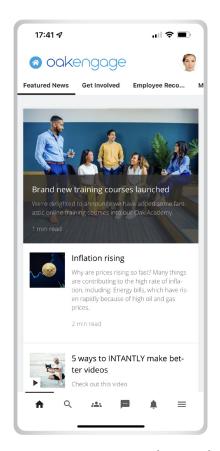


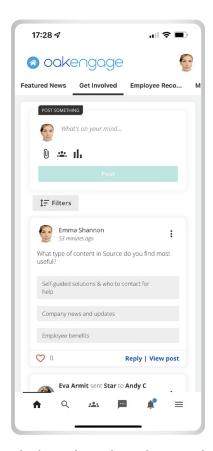
The search experience in Oak is unusual and works very well.

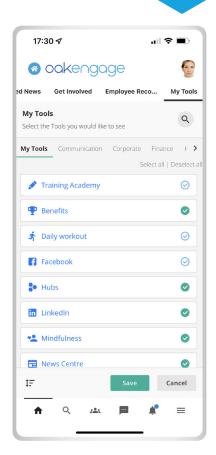


Oak includes a variety of configurable tools, such as events management, recognition, and expenses management.









The experience in the native Oak app is as good as the desktop.

# Target businesses



# **Product type**



# Branding opportunities



# **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price per user per month, Subscription – price band based on number of users

#### PRICING NOTES

Discounts available for: Charities and non-profit organisations, frontline users, multi-year commitments, customers only pay for active users, businesses over 20,000 users, Implementation costs may be amortised over the duration of a contract term or alternatively use-it-or-lose-it discretionary budgets may be utilised as pre-payments to offset projected operational expenditure.

Price includes: Project workshops, training for admins, training for end users, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades, choice of modules / add-ons, Microsoft 365 set-up, hosting, onboarding user data, access to a community & webinars, consulting services, technical assistance and advice for SSO integration with third-party tools and systems. Technical assistance with user data import configuration and synchronisation. Specialists to assist with content migration where required and appropriate. Site Review Services. Support, guidance and assistance with site creation and build. Bespoke training / guidance videos.

# Base systems





Requires SharePoint



Optionally works with SharePoint



Other

# **Sectors**





Healthcare



Property and construction



Public services, government and administration



Retail



# **COMPANY AND PRODUCT**

# Company details



Company Oak Engage



Company founded



Company locations

Durham, UK (HQ), UK



ISO 27001 certified



Typical client size 1,000 - 5,000 employees



Largest deployment so far

Largest deployment has in excess of 80,000 users of the product. Due to the SaaS nature of the product it is built to scale and is not limited by geographical location.



Partner locations



#### Customers

Clients include: NatWest, Sevita, Five Guys, Aldi, ITV, NHS, BooHoo, NEP, Severfield, Miller Homes

# Product and technical details

 Name of product
 Oak Enterprise

 Product launched
 Standard Oak 2016, Oak Enterprise 2022

 Current version
 As a SaaS product Oak undertakes a continual improvement cycle making version numbers less relevant. The version being reviewed will be the production version as of September 2022.



#### **Accessibility**

Individual users can change the font size of what they're seeing, Alt text is in use for images, keyboards can be used for navigation. Oak Engage are working towards the WCAG 2.1 standard. Some legacy features are not fully compliant yet. They have a partnership with an accessibility consultant who carries out yearly audits of the product, in between these audits they carry out spot tests of certain areas of Oak. In addition, all their engineers and QA staff are web accessibility trained and they ensure all new features are tested to WCAG 2.1 AA standards before release. The product has an accessibility backlog which is ordered using the WCAG success criterion severity level and they tackle accessibility issues in each of their sprint cycles.

#### Deployment

Client on- Clie premises	ent private cloud Microsoft Azure	Amazon Web Services	Vendor- hosted	Microsoft 365 tenant	Other*
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<sup>\*</sup>MS Azure Dedicated Instance and also Virtual Private Cloud

#### Data residency

Data can be restricted to a specific country, which is discussed with the customer at the outset of a project. Currently Oak Engage have datacentres in UK, EU, USA, but can easily host data in any country supported by MS Azure.

#### Client data encrypted

In transit only

In transit and at rest

At rest only

#### **Authentication supported**

Azure Active Directory ADFS Open ID Oauth G Suite Other	r*
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\*OKTA, PING, Office 365, Any SAML 2.0 connection

## Search technology

Apache Lucene/ Solr Apache Lucene/ Microsoft Vendor's own Other

#### Document library sources integrated

Вох	Dropbox	Google Drive	SharePoint	OneDrive	Other
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#### SharePoint/0365 versions supported (if applicable)

SP Server 2016 SP Server 2019 SP Server Subscription Edition	Viva Connections
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#### Mobile app deployment

Google Play store	Apple store	MDM	МАМ	Other*
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<sup>\*</sup>Support for Apple Business Account deployments for white labelled solutions.

#### Reverse-out options

In the event that a customer decides to end their partnership a dedicated Customer Success Account Manager at Oak Engage will lead them through their off-boarding process. Oak Engage provide a period of time when customers have access to the data after license end so they can quickly and easily extract what they need, should they need to do so.

#### Languages supported

UK, USA, French, German, Spanish, other languages on demand.

#### Machine translation

Oak Engage see auto-translation as having a very specific use case - to be able to get a quick on-the-fly view of posts or comments when managing a global organisation that supports multiple languages. They aim to have added a quick view feature (similar to Facebook auto translate on-the-fly) in Q4 2022.

#### Right to left script

No

# Set-up and support

#### Set-up process for new clients

The set-up process is based on a consultative approach. Oak Engage professional services team take an 'outcome-based approach' delivered in an agile manner focused on the customer's key outcomes. Their agile approach enables deployments to take place in as little as 48hrs. Oak Engage Implementation Consultants guide customers through planning, creation and launch, providing a bespoke, tailored experience suited to their objectives and provide recommendations on the best approach. Supported by a CSM and wider team they'll ensure a close productive relationship for the duration of their partnership.

#### **Product updates**

Updates are released approximately every four weeks, with larger changes communicated well in advance. Oak Engage handle all the product testing as part of their normal development and release process.



#### Product update process

As a SaaS solution, there is no technical maintenance required by customers, the platform is fully managed by Oak Engage. Their DevOps team perform 'out of hours' upgrades within each region. Oak is designed to run 24/7 and doesn't go offline for updates or maintenance. Customers can not opt-out of updates as Oak Engage run a consistent version of Oak across their platform. Customers can have early access to new features and can opt to turn off features in configuration.

#### Technical support

Oak is monitored all day every day, by a team of on-call engineers. Should there be any disruption to service, automated alerts are raised with that team. Customers are kept up to date with any disruption to service and provided regular updates via their status page. Technical support is provided by a dedicated internal team who have technical experience of the Oak platform. The team can be reached via several channels, including a dedicated support portal via the product, chat, email and phone.

#### **User community**

Oak Engage regularly hold user workshops at their office and have a new user conference coming in 2023.



# The Company

Oak Engage says: "Oak Engage is a leading SaaS provider in the digital workspace and employee collaboration arena. Empowering internal comms teams to deliver curated content streams that reach distributed and diverse employee bases, getting the right information to the right people at the right time. We enable organisations to mobilise and motivate their most valuable asset – people."

#### The Product

Oak Engage says: "Oak Engage is a software platform that combines traditional intranet functionality with next-generation employee communication application capabilities, enabling internal comms teams to create and deliver curated content streams to distributed and diverse employee-bases, getting the right information to the right people at the right time to encourage the desired behaviours and actions."

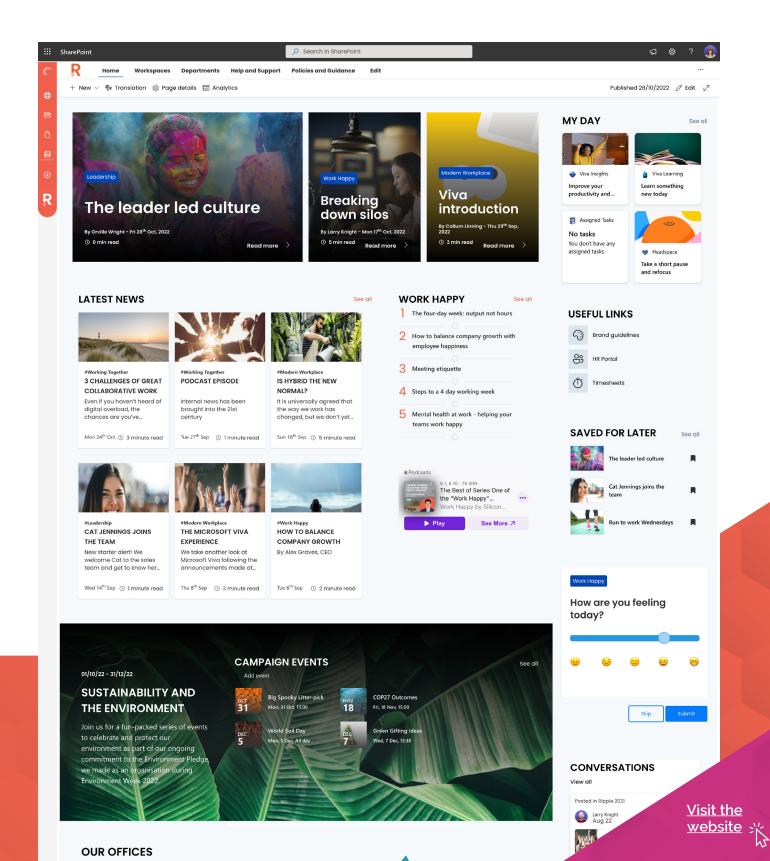
# Their view of the marketplace

Oak Engage says: "Distributed, desk-less, disconnected workforces (and people coming to terms with hybrid or remote working models) often feel isolated and struggle to keep up-to-date with the torrent of product, policy and procedural changes that impact them and their customers. Oak helps IC professionals to reach, empower and enable diverse audiences with targeted contextual comms campaigns that demonstrably improve engagement, reduce attrition risks and deliver tangible business outcomes."





# BEACON





In 2021 **Ripple** was purchased by UK-based Silicon Reef, which prompted a switch in focus for Ripple that had previously been a SharePoint intranet in-a-box product. We would now describe it as an internal communications layer that lives on top of SharePoint. Then in mid-2022 Silicon Reef released an accompanying product called **Beacon**, which can be used on its own but offers a nice complement to Ripple's functionality. Between them, they enhance design and communication features for publishers while respecting SharePoint functionality.

Beacon provides some excellent tools to enhance branding and design options in SharePoint. Admins use familiar SharePoint screens to adjust the styling of the intranet, including company logos, fonts, colours, and can reflect complex options such as parent and child branding. Beacon then expands the number of web parts available for SharePoint pages, making them look more sophisticated. Examples range from the simple, such as adding background images behind web parts, to more complex. One that we thought particularly useful adds hot spots to an image, which could be a map of company locations and pop-out information panels such as a video of the office interior. All Beacon publishers can style these web parts however they choose; added in late 2022 is the welcome ability for admins to lock brand choices.

Alongside Beacon, Ripple offers some nice features that internal communicators will particularly appreciate. News posts are built using configurable web parts from SharePoint with a few dedicated Ripple tools added in, such as embedded video content, or creating animated headers. We like the time to read estimate and ease of reading score (Flesch) that help publishers consider if their article is suitable for their audience. A similar 'accessibility checker' is also planned and will be a good addition to the functionality. People can comment on articles, but on the roadmap is a move towards using Yammer

for comments and reactions.

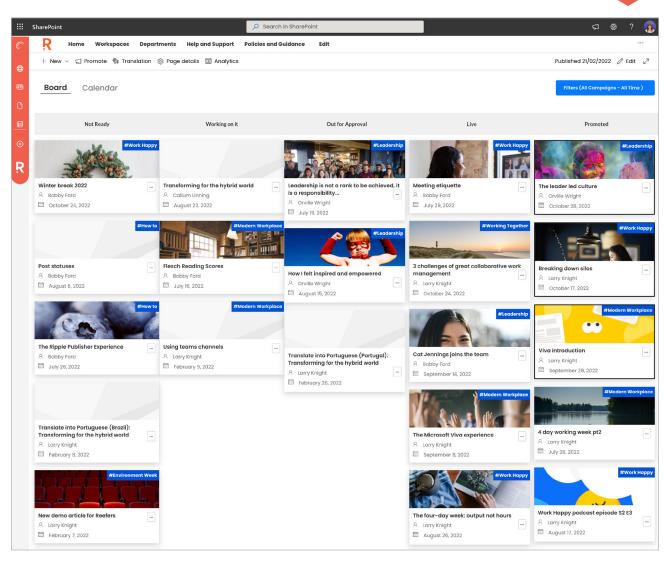
The only audience targeting tools in Ripple come from standard SharePoint functionality, which some may find lacking, although 'campaigns' and 'promoted news' can help with visibility. 'Campaigns' are created using tags that gather articles together under an umbrella, which can be displayed in dedicated web parts, and are reported on within the analytics. There is another dedicated web part for 'promoted news', which Silicon Reef suggests could be used for global news.

Publishers keep on top of the flow of news through a Kanban or calendar view, which Silicon Reef plans to expand to allow other communications or comms events, such as a company conference, to be added to the calendar to help with further planning. There are some simple analytics that focus mostly on campaigns, although pulse survey results are also found here. We like sentiment analysis among the results; benchmarking and Al generated recommendations are on the roadmap and will be a good addition.

There is no dedicated app for Ripple or Beacon, although the web parts are compatible with Viva Connections. This includes displaying the whole intranet within Viva Connections in MS Teams. Ripple news is also displayed within the Viva Connections app itself, so mobile users will still see company news from Ripple and / or SharePoint.

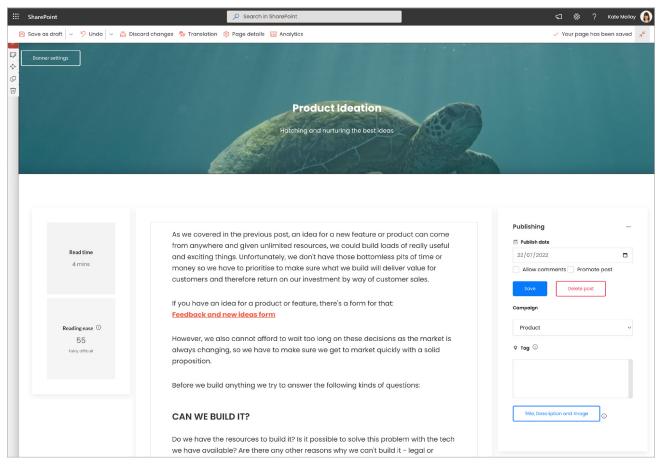
Beacon and Ripple work well together but do feel like separate products at the time of reviewing. Silicon Reef say they are working towards tying them together more in the near future. There are a lot of other developments on the roadmap that should improve the sophistication and comprehensiveness of the tools. Given the cost of both products is so low for larger businesses, we think the entire package is a simple but effective complement to SharePoint Online that's worth exploring.



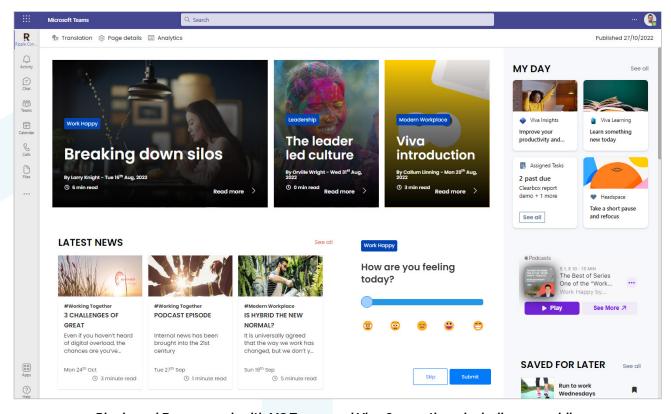


Ripple includes a Kanban Board and calendar view of articles to help publishers manage the flow of communication.



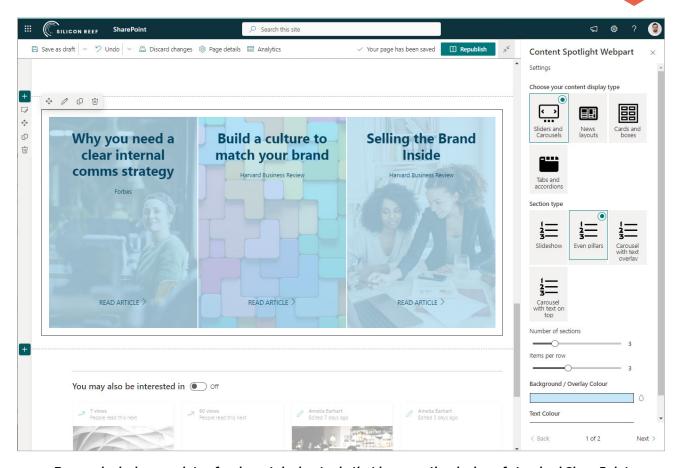


There are some nice content creation options in Ripple, on top of what you'll find in SharePoint.



Ripple and Beacon work with MS Teams and Viva Connections, including on mobile.





Beacon includes a variety of web part design tools that improve the design of standard SharePoint.



# Target businesses







# **Product type**



# **Branding opportunities**



# **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Annual subscription

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational institutes, government / public sector, healthcare, multi-year commitments.

Price includes: Training for admins, customer success services, maintenance, product support, branding / theming services, editor manuals, updates and upgrades.

# Base systems



# **Sectors**



# **COMPANY AND PRODUCT**

# Company details



Company Silicon Reef



Company founded 2016



Company locations

London, UK



ISO 27001 certified No



Typical client size

1,000+ employees



Largest deployment so far

35,000 employees global



Partner locations UK



#### Customers

Clients include: The MetOffice, SEGA, Willmott Dixon, Anglo American, Santen, Bauer Media

# Product and technical details

Name of product Ripple + Beacon Product launched 2021 **Current version** v2.1 August 2022 **Accessibility** WCAG 2.1 compliant



# Deployment

Client onpremises Client private Cloud Microsoft Azure Amazon Web Services Vendorhosted Microsoft Other

#### Data residency

N/A

#### Client data encrypted

In transit only	In transit and at rest	At rest only
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#### **Authentication supported**

Azure Active Directory	ADFS	Open ID	Oauth	G Suite	Other
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#### Search technology

Apache Lucene/ Apache Lucene/ Microsoft Vendor's own Other	
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# Document library sources integrated

Вох	Dropbox	Google Drive	SharePoint	OneDrive	Other
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# SharePoint/0365 versions supported (if applicable)

SP Server 2016	SP Server 2019	SP Server Subscription Edition	SP Online	Viva Connections
Mobile app deployment				
Google Play store	Apple store	MDM	MAM	Other*

\*None



#### Reverse-out options

All data is held in the client environment. If the contract ends users will have a transition period to move the data into a new system before access to the web parts is removed.

#### Languages supported

English only at present – however, in browser translation will translate most, if not all, areas of the tools.

#### Machine translation

Makes use of SharePoint's out-of-the-box translation functionality and Azure Cognitive Services to create translation pages.

#### Right to left script

Yes

# Set-up and support

#### Set-up process for new clients

The deployment and configuration are done through a largely automated process into the client's tenant. Set up of initial pages and layout designs to support the onboarding to the new intranet can be provided as a separate consulting engagement if needed, including comms support for launch.

#### **Product updates**

The product is scheduled for quarterly minor releases and no more than annual major releases.

#### Product update process

Updates are rolled out to customers automatically, however, customers may choose to be excluded from automatic updates if they are happy to complete the updates manually. Support teams can give guidance, or if needed and by prior arrangement, can complete the updates on their behalf.

#### Technical support

Support is provided by the in-house team, including the teams who built the products as part of the software assurance agreement. This support is provided during standard UK business hours.

#### User community

Customers are invited to participate in Silicon Reef's product portal where they can submit new ideas and see what Silicon Reef are working on, leaving notes and 'voting' for features they would like to see. Customer success teams will be in regular contact with the customer product owner(s) to provide support and guidance and to keep them updated on new features or to identify areas of improvement to help them get the most from the tools.



# The Company

Silicon Reef says: "Silicon Reef is a Microsoft 365 consultancy, a trusted Microsoft Partner and the creators of Work Happy. Our mission is to empower people to be connected, productive and live a life of balance."

# The Product

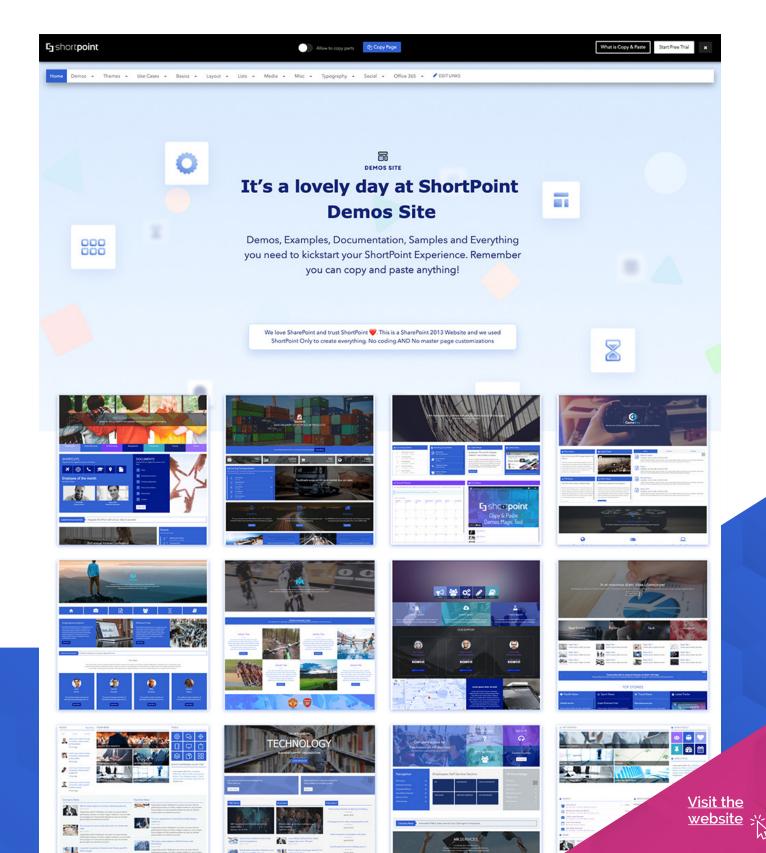
Silicon Reef says: "Ripple supports internal comms teams to plan, create and track employee comms and news. With drag and drop planning capabilities, rich content editing web parts from Beacon and custom branding, Ripple builds pages which look and feel like your company and help you deliver exceptional campaigns."

# Their view of the marketplace

Silicon Reef says: "Employee engagement has never been more important. Making sure that your internal comms deliver the message in a way that looks and feels like your brand and encourages engagement from your audience in a hybrid environment is critical."



# 5 shortpoint





**ShortPoint** is a SharePoint site branding and page design tool that helps admins and site owners quickly achieve attractive designs that are quite distinct from standard SharePoint. It is different from the SharePoint 'intranet-in-a-box' products in this report, as it does not provide ready-made site structures or functionality that intranet visitors would use. It is aimed squarely at making site design easier, which is reflected in the low cost and licensing model that is based on small numbers of authorised users.

Once installed in your SharePoint instance. ShortPoint has three main benefits or features. The first is a large number (around 100) of attractive landing or home page templates on the ShortPoint website, which clients are welcome to copy and drop into their own intranet. The second is the 'Theme Builder' tool that helps brand the intranet the way you want, with appropriate colours and logos for your organisation. The tool takes you through the steps of choosing the colour palette, fonts, imagery, header etc., applying the settings as a SharePoint theme. It's a much easier process than standard SharePoint although complex branding, such as parent and child businesses, would need to be managed through subsites or different site collections.

The third main benefit of ShortPoint is its 'Page Builder' web part. This is a 'Swiss army knife' of column-based layouts and content components that far exceed what you get with standard SharePoint. Many of these can be connected to data sources, such as SharePoint lists, libraries, site news and more. This consistently

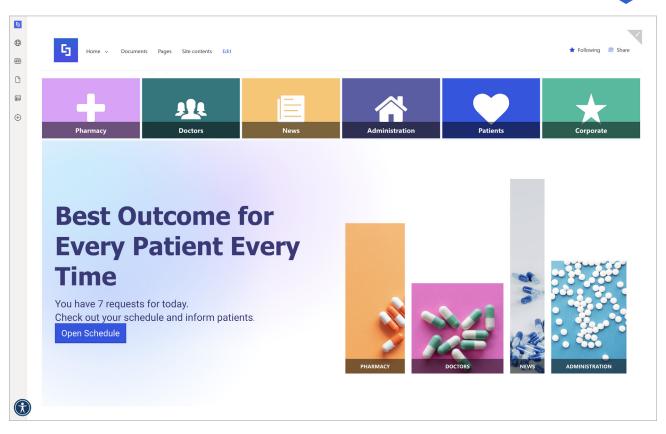
presents content in any of ShortPoint's design elements (such as tiles, image lists, or slideshows) and allows it to be re-used in multiple places. ShortPoint's roadmap includes a Graph API connection which will provide more personalised content, such as 'my recent files'.

ShortPoint components are styled and configured with simple menus, making it easy for an admin to make an attractive page without the need for coding. Components are configured in a wireframe 'grid view' mode, or a new 'live' mode shows the page and content as visitors will see it, while still being able to edit.

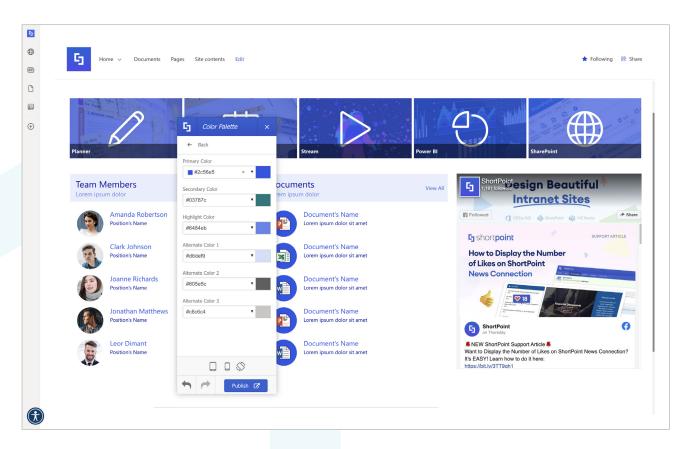
ShortPoint has an optional integration with accessibility service, UserWay. This needs an additional license for admins to take advantage of scanning pages and fixing issues, like missing alt-text tags, while flagging more complex problems for remediation. However, at no extra cost, employees can take advantage of an accessibility menu that makes it easy to make text bigger, change contrast, increase spacing and more.

The low price could make ShortPoint attractive to many small and medium organisations, but additional investment (time and money) will be needed to actually plan the intranet, and then implement the content too. As a design tool, ShortPoint allows you to be much more creative with your intranet's appearance, while leveraging the functionality that comes from Microsoft. ShortPoint has an excellent demo site that provides an overview of the product and is well worth checking out to get a better idea of how it works.



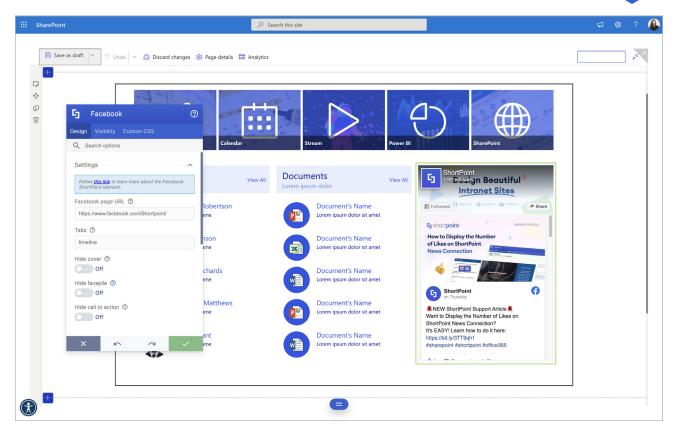


One example of around 100 available page designs.

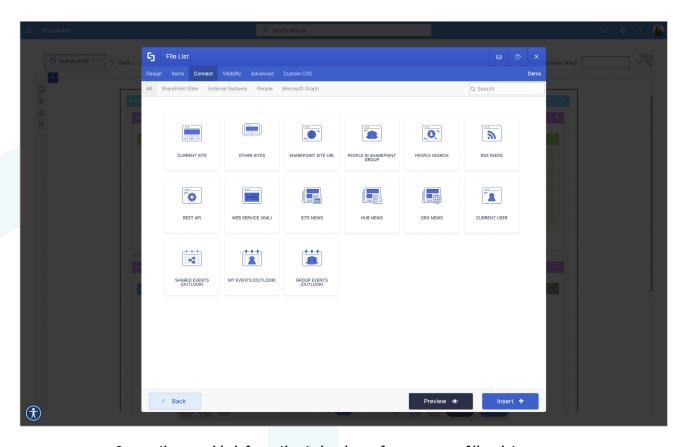


ShortPoint's Theme Builder makes it easy to configure brand colours, imagery, and typography to your organisation's needs.





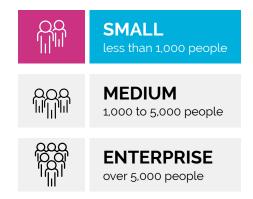
ShortPoint's 'live' mode enables style changes while previewing what intranet visitors will see.



Connections enable information to be shown from a range of live data sources.



## Target businesses



## **Product type**



## **Branding opportunities**



## **Pricing**

\$ \$ \$
\$ \$ \$
\$ \$ \$
\$ \$ \$

#### **PRICING MODEL**

ShortPoint is licensed annually, priced per "Designer," meaning the individuals using ShortPoint to create the site. Details can be found on their website.

#### **PRICING NOTES**

Discounts available for: Charities and non-profit organisations, schools and educational Institutes, multi-year commitments.

Price includes: Training for admins, customer success services, maintenance, product support, editor manuals, updates and upgrades, access to a community & webinars.

## Base systems



## **Sectors**



# **COMPANY AND PRODUCT**

## Company details



# Company ShortPoint Inc.



# Company founded 2015



Company locations
Ann Arbor, MI, USA (HQ), Dubai



#### ISO 27001 certified

No, but ShortPoint recently completed a SOC 2 Type 2 examination with no exceptions.



### Typical client size

Any company with 50+ employees up to large enterprise organisations.



# Largest deployment so far

ShortPoint has several clients with tens of thousands of employees dispersed globally.



#### Partner locations

Please see their website for details.



#### Customers

Please see their website for details.

## Product and technical details

Name of product	ShortPoint	
Product launched	2015	
Current version	8	
Accessibility	Enabling the ShortPoint accessibility widget provided by UserWay (separate license fee) ensures WCAG 2.1 compliance.	



### Deployment

Client onpremises

Client private cloud

Microsoft Azure Amazon Web Services Vendorhosted Microsoft 365 tenant

Other

### Data residency

N/A

### Client data encrypted

In transit only

In transit and at rest

At rest only

### **Authentication supported**

Azure Active Directory

ADFS

Open ID

Oauth

G Suite

Other\*

\*N/A, ShortPoint is a client side (JavaScript) solution that will be executed in on customers machines, ShortPoint does not provide any authentication, as it is considered as a responsibility of the hosting platform (e.g. Microsoft SharePoint)

### Search technology

Apache Lucene/ Solr

Apache Lucene/ Elastic

Microsoft

Vendor's own

Other

## Document library sources integrated

Вох

Dropbox

Google Drive

SharePoint

OneDrive

Other

## SharePoint/0365 versions supported (if applicable)

SP Server 2016 SP Server 2019

SP Server Subscription Edition

SP Online

Viva Connections

## Mobile app deployment

Google Play store

Apple store

MDM

MAM

Other\*

 ${}^{\star}$ None



#### Reverse-out options

ShortPoint does not store client data - all client data is stored in client's SharePoint environment.

### Languages supported

English

#### Machine translation

No

### Right to left script

Yes

## Set-up and support

### Set-up process for new clients

Installation of ShortPoint takes approximately 10-15 minutes, allowing the use of ShortPoint's design tools immediately afterwards. The design and build of the intranet may take as little as a week, or up to a couple of months, depending on the client's requirements and proficiency. ShortPoint offers implementation services if requested.

## **Product updates**

On average, every 2-3 months.

### Product update process

Dependent on SharePoint version. For SharePoint Online and SharePoint 2019, automatic upgrades are enabled by default, but clients can opt-out to enable manual upgrades only. SharePoint 2013 and 2016 require manual updates.

## Technical support

ShortPoint has support agents in many time zones. Support is initiated by customer submitting a support ticket. ShortPoint will provide answers via email when possible, or arrange for a virtual meeting when needed to address customer questions.

## User community

ShortPoint has a forum section on its support centre which is used by some clients to ask questions. However, most clients reach out to support directly so the forum is relatively quiet. ShortPoint maintains an extensive knowledge base with solutions for common client requests.



## The Company

ShortPoint says: "ShortPoint Inc. helps teams build beautiful and engaging intranets without coding in SharePoint and Microsoft Teams."

## The Product

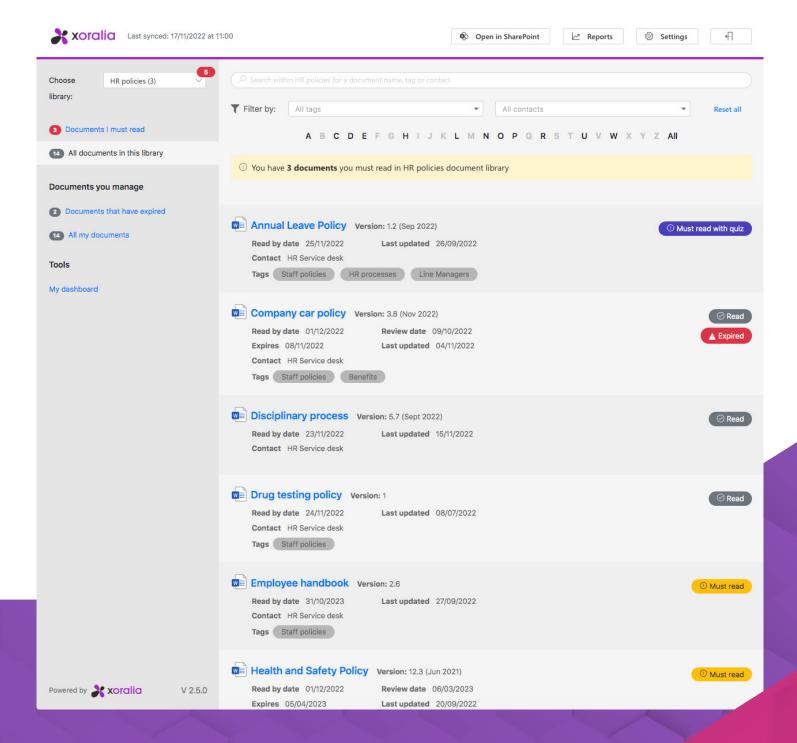
ShortPoint says: "ShortPoint is a design extension for Microsoft SharePoint and Teams to help design, brand, and build sites with no coding."

## Their view of the marketplace

ShortPoint says: "Creating an engaging and beautiful intranet that matches an organization's brand identity can be a challenging task. Traditionally, companies stick with out-of-the-box SharePoint configurations which may not match their brand identity, or hire expensive consultants to create a custom intranet. ShortPoint provides a toolset that anybody can use to create an attractive, branded intranet, with no coding required."









**Xoralia** policy management software, provided by Content Formula, is a useful digital workplace application that works well alongside a SharePoint-based intranet. The target market is heavily regulated, or regularly audited businesses, who have a need to manage documents with specific content life cycle, employee mandatory read and reporting requirements, such as company policies and procedures. Xoralia is built for the Microsoft ecosystem, working well alongside Teams and SharePoint. While primarily focused on desktop users, it also works on mobile either through a responsive view, or via the Teams app, and so can be used by frontline workers who have Microsoft accounts.

Documents managed through the product remain within SharePoint libraries, with Xoralia taking advantage of SharePoint's functionality, such as version history and workflows. It has a suitably uncluttered front end, though styling on the user interface is a little sparse and, aside from being able to add a company logo, there are no opportunities to apply branding.

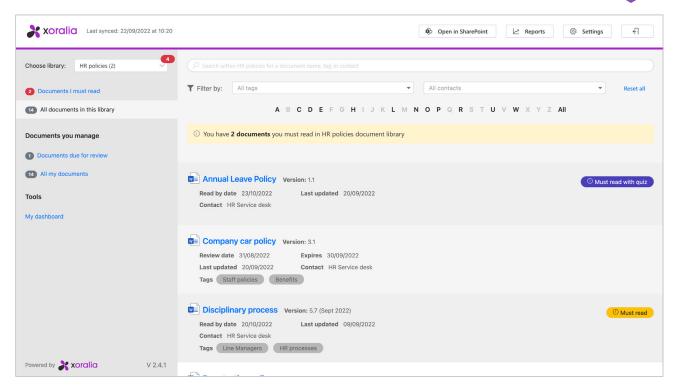
As Xoralia's main purpose is to track whether users have read mandatory documents, there's a good variety of reporting available, both at document level and product-wide. The reporting dashboard is personalised. The dashboard is where a permanent record of document activity is held and can be exported from. Headline stats show details such as personal completion rates and quiz scores (see below), while a full history of activity relating to each document is accessible to admins. There's further reporting within the document overview section; document read status and percentage of users who've read the file are presented at a glance. Reminders can be sent to single or multiple users, and a permanent log of activity over time per user is retained for each document.

When a user opens a document, an overlay containing document details appears at the top of the screen with a distinct call to action for

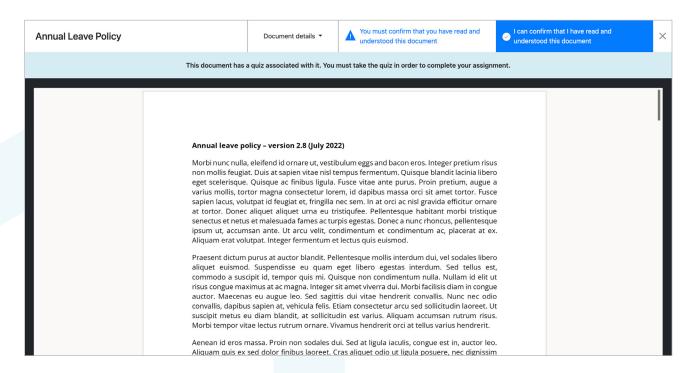
them to confirm they've read the document. On confirmation, the overlay instantly displays the status change, along with the date submitted. This is logged in the permanent record of read activity. Xoralia also provides a quiz function for use where businesses need confidence that documents are being understood as well as read. Users must reach a pass mark (set by admins), with anti-cheat options available; for example, from a pool of 100 questions, the system will select ten at random to present to the user.

Any group in the M365 environment can be used to create an audience for a read instruction, and everyone in that group will receive the notification to read the document at the same time. Options for notifications include email, a message in Xoralia itself, and through the activity feed on Teams (browser or app version). Read by dates can be a fixed date, or a 'dynamic' date, where a number of 'relative days' is assigned. For example, setting 'read within 30 days' for a group would mean that anyone subsequently added (for example, a new team member who joins three months later) would receive a message telling them the document has a 30-day read duration from the date they joined the group. Policies can also be recurring, such as every 365 days; Xoralia provides the latest version if the document has been updated in the meantime. We liked the flexibility in this approach and the possibilities around employee onboarding it provides.

Xoralia's capabilities make it a more user-friendly place than SharePoint libraries. There are developments on the roadmap which will let the user complete more tasks within Xoralia, rather than needing to return to SharePoint, such as document review workflows. As the product essentially performs one role in terms of document governance, the price point might seem relatively high. However, for any business that requires this level of governance, purchasing Xoralia would make far more sense than trying to develop an inhouse alternative.

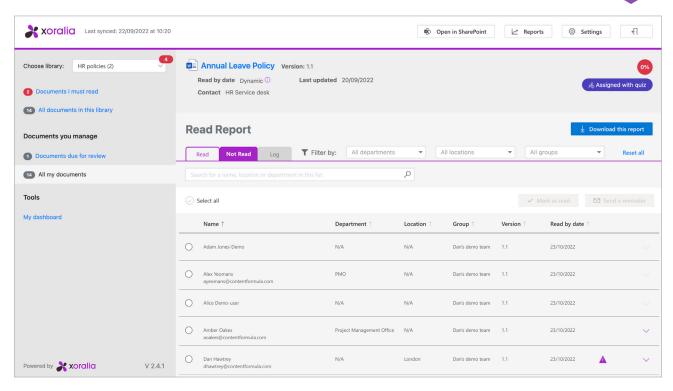


In the main document dashboard, the user's documents are listed with a clear status indication – must read, must read with quiz, read – and there are search and filter options available. Users can move between different document libraries from this screen as well as choosing to see all documents assigned to them.

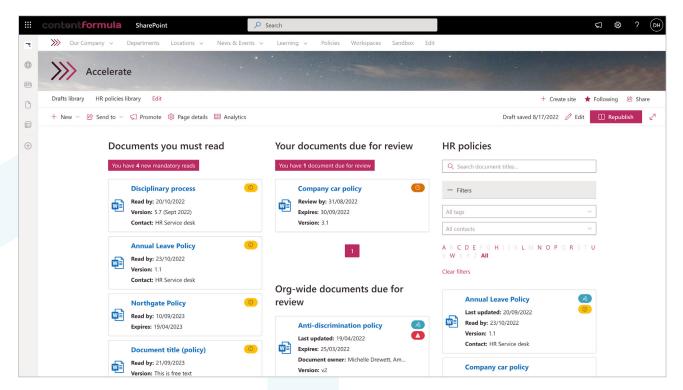


The toolbar sits at the top of the document with a clear call to action for the user to confirm they have read the document.





Xoralia provides a reporting dashboard for each document. The report lists the users that have read a mandatory document and those that have not.



Xoralia comes with four SharePoint web parts which provide a personalised view of mandatory reads, documents for review and additional information for users and document managers.



## Target businesses



**SMALL** less than 1,000 people



MEDIUM
1,000 to 5,000 people



**ENTERPRISE** over 5,000 people

## **Product type**



## **Branding opportunities**



## **Pricing**

PRICE BAND	
250 users	\$ \$ \$ \$
1,000 users	\$ \$ \$ \$
5,000 users	\$ \$ \$ \$
20,000 users	\$ \$ \$ \$

#### **PRICING MODEL**

Subscription – price band based on number of users

#### **PRICING NOTES**

Discounts available for charities.
Price includes: Project workshops, training for admins, customer success services, maintenance, product support, editor manuals, updates and upgrades, choice of modules / add-ons, Microsoft 365 set-up, onboarding user data.

## Base systems



Fully standalone



Requires SharePoint



Optionally works with SharePoint



Other

## **Sectors**



Healthcare



Property and construction



**Energy and utilities** 



Accountancy, banking and finance



Charity and voluntary work



# **COMPANY AND PRODUCT**

## Company details



## Company

Content Formula



### Company founded

2005



### **Company locations**

London, UK



#### ISO 27001 certified

Content Formula say they are implementing ISO27001 at present.



## Typical client size

100-5,000 employees



# Largest deployment so far

5,000 employees



### Partner locations

Canada. Further partners will be added in due course.



#### Customers

Clients include: Gama Aviation

## Product and technical details

Name of product	Xoralia Policy Management Software		
Product launched	2021		
Current version	2.4.1		
Accessibility	WCAG 2.1 compliant		



### Deployment

Client onpremises Client private cloud Microsoft Azure Amazon Web Services Vendorhosted Microsoft Other

### Data residency

UK, US - Content Formula plan to add more to meet demand.

### Client data encrypted

In transit only

In transit and at rest

At rest only

### **Authentication supported**

Azure Active Directory	ADFS	Open ID	Oauth	G Suite	Other
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### Search technology

Apache Lucene/ Apache Lucene/ Microsoft Vendor's own Other

## Document library sources integrated

Box Dropbox Google Drive SharePoint OneDrive Other

## SharePoint/0365 versions supported (if applicable)

SP Server 2016 SP Server 2019 SP Server Subscription Edition SP Online Connections

## Mobile app deployment

Google Play store Apple store MDM MAM Other\*

<sup>\*</sup> Xoralia comes with an MS Teams app and works within the Teams mobile app.



### **Reverse-out options**

Client data (e.g. read reports) can be downloaded through the main interface. Policies and other documents sit on the client's Office 365 tenant at all times so there is no need to re-patriate this data.

### Languages supported

The interface is multi-lingual and can support any language. Languages are added to suit demand.

#### Machine translation

No

### Right to left script

Yes

## Set-up and support

### Set-up process for new clients

Installation takes a few minutes and can be carried out by the client or by Content Formula. Content Formula offer a full install, setup and admin training if required, and also offer documentation on their website.

### **Product updates**

Every 6 weeks.

## Product update process

All customers are updated at once.

## Technical support

Technical support is currently delivered during UK office hours.

## User community

No



## The Company

Content Formula says: "Content Formula is a digital workplace consultancy specialising in Microsoft 365, PowerPlatform and Azure. They design, build and support intranets, knowledge management tools, Learning Management Systems, and process automation tools."

## The Product

Content Formula says: "Xoralia is a policy management software built for SharePoint, Teams and Office 365. It helps organisations to efficiently and effectively manage and streamline their entire policy and procedures lifecycle, including policy creation, distribution, attestation, tracking and reviews. Xoralia provides the user with an easy-to-use automated system that can help establish a robust policy and procedure framework, save admin time, achieve compliance and minimise risk."

## Their view of the marketplace

Content Formula says: "Organisations face growing pressure to comply with laws and regulations that can develop and change at a rapid pace, meaning compliance teams often face challenges to disperse, manage and enforce the multitude of policies and procedures required to meet regulatory compliance. Xoralia can help by automating and streamlining policy workflows, providing a time efficient, organised and trackable way of connecting employees to policies and procedures and ensuring that they have read and understood the regulations that govern their job. Xoralia software provides a full suite of policy and procedure management tools and features, including a centralised document hub for both document owners and users to easily access, find, and manage policy documents all in one place."



