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Cool Vendors in High-Performance Workplace, 2006

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High-performance workplace includes technologies that span enterprise activities. The cool vendors in 2006 reflect that richness and illustrate unique approaches to achieving performance improvements.

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This research does not constitute an exhaustive list of vendors in any given technology area, but rather is designed to highlight interesting, new and innovative vendors, products and services. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

1.0 What You Need to Know

Our cool vendors for 2006 reflect a spectrum of technologies — collaboration, information access, messaging, e-learning and metadata markup — that helps create and support a high-performance workplace. Diverse functions and applications must support activities that range from personal to businesswide concerns.

2.0 Cool Vendors

2.1 Clearwell Systems

Santa Clara, California (www.clearwellsystems.com)

Why Cool: The Clearwell Email Intelligence Platform, which launched 23 January 2006, provides a business intelligence system for Microsoft Exchange environments that can pull and analyze data from active e-mail data stores, personal folders and an archive from leading e-mail archive vendors. Clearwell Systems enters the "e-mail intelligence" market at a time when the amount of e-mail and the need to efficiently mine it are gaining awareness as enterprises that were early adopters of e-mail archiving are overwhelmed by the output of search results and see the importance of tracking related threads.

Clearwell's appliance approach, with no agent requirement, provides for quick deployment. By analyzing the unique properties of e-mail (such as recipients, replies, forwards, cc's and subject headers), and combining it with organizational data, Clearwell dynamically derives e-mail-specific communication patterns. Then, it applies linguistic and statistical analysis algorithms to extract intelligence from e-mails and attachments. The solution identifies messages with certain key words or phases and tracks individual and group-to-group communication flows within the company, and to customers, suppliers and partners. Clearwell complements e-mail archiving solutions and provides pre-built integration that enables integration with leading e-mail archiving products.

Challenges: To meet the legal and compliance requirements, an archive will be needed, and archive vendors are promoting their solutions as "good enough" or soon to have expanded e-mail intelligence features. Clearwell needs to become the provider of those expanded features through original equipment manufacturer agreements because it is too small to address the fast-growing legal discovery market that this solution needs to be part of.

Who Should Care: CIOs and Microsoft Exchange administrators faced with legal discovery and no deployed archiving solution will find this solution particularly appealing, but this solution will also appeal to customer service, legal and compliance officers who need more-detailed information than is available from the more generic search capabilities of more-widely available solutions.

Analysis by Carolyn DiCenzo and Kenneth Chin

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2.2 Day Software

Basel, Switzerland (www.day.com)

Why Cool: Day Software has been a niche player in enterprise content management (ECM) with a focus on Web content management and digital asset management. It is leading the charge on the Java Specification Request (JSR) 170 standard.

Day has reinvented itself by helping to lead the initiative around the Java Content Repository or JSR 170, which provides a standard way for content management repositories to be inter-connected and opens the door for widespread content repository federation.

Challenges: JSR 170 specifications were only finalized in 2005. Thus, not all the major ECM vendors are ready to support them. Day is quickly being viewed as a supplier of JSR 170 capabilities. As a result, it has become an acquisition target by major ECM vendors, such as FileNet and others.

Who Should Care: IT departments that have multiple content management systems that need to be integrated should look toward JSR 170 as part of the answer to repository integration.

Analysis by James Lundy

2.3 Edgar Online

Norwalk, Connecticut (www.edgar-online.com)

Why Cool: In April 2005, Edgar Online (EOL) launched I-Metrix, a service that provides Extensible Business Reporting Language-tagged (XBRL-tagged) U.S. Securities and Exchange Commission (SEC) filing data and related tools. It has XBRL-tagged line items in SEC 10K, 10K/A, 10Q, 10Q/A filings and 8K earning releases for approximately 9,000 companies, including those with a market capitalization of at least $25 million that are covered by six XBRL taxonomies (commercial and industrial, banking, brokerage, insurance, oil and gas, and real estate). XBRL-tagged SEC data is provided within a maximum of 24 hours of a company filing with the SEC. Data for other geographies (including China and Japan) and industry groups is being added.

EOL has broken the "chicken-and-egg syndrome" around XBRL-tagged data for analysis. XBRL-tagged fundamental data introduces significant efficiencies for the analysis of fundamental data. Because regulators have not required companies to report using XBRL, there has been a lack of XBRL-tagged data in the U.S. and many other geographies. Using proprietary technologies, EOL has automated the tagging and online provisioning of fundamental data, including the ability to automatically load the data into Excel, the tool of choice for many analysts.

Challenges: The primary challenge is the commoditization of XBRL-compliant data, which is expected to occur in the future. To remain competitive, EOL must, with its limited staff resources: 1) aggressively develop differentiating, value-added analytical and reporting capabilities, and 2) develop and maintain a reputation for data and service quality, depth and breadth.

Who Should Care: Investment professionals and individuals who analyze fundamental data and seek to improve efficiency and quality of analysis would be interested in EOL.

Analysis by Mary Knox

2.4 Ex'ovision (Eye Catcher)

Doorn, The Netherlands (www.exovision.com)

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Why Cool: Eye Catcher is a person-to-person desktop video conferencing tool that recreates the impression of eye contact between participants. Eye contact is crucial to approximate the experience of a meeting among people in the same room. Standard video conferencing setups don't allow eye contact because participants look at the video screen while the camera is off to the side or above the screen. Eye Catcher uses mirrors built inside a desktop box to put the video camera directly behind the video image, giving the impression of direct eye contact.

Challenges: The Eye Catcher system is primarily useful for two-person meetings. Several Eye Catcher devices in different locations can be linked, but this setup is complicated and less effective. Price points are also a challenge. Desktop webcams are driving down the acceptable price for desktop video conferencing to less than $50. Eye Catcher costs approximately $3,600 per endpoint per year, plus network and integration costs.

Who Should Care: We expect that this will be interesting to very senior executives willing to invest in "executive jet class" conferencing with their direct reports with whom they have frequent contact. Eye Catcher will reduce the need to travel for face-to-face meetings and improve the experience of room-based video conferencing.

Analysis by Jeffrey Mann

2.5 Kazeon Systems

Mountain View, California (www.kazeon.com)

Why Cool: Kazeon Systems manages the proliferation of unstructured content by:

1. Reviewing content on multiple file servers or repositories and tagging files with enterprise information management in mind. It deletes redundant, aging and draft files, as well as classifies and moves certain content to active archives and relates it to processes.

2. Setting policies and tagging content to optimize storage management hierarchy and costs.

3. Evaluating new content in the context of reduced risk and increased process availability toward better governance, compliance and reuse.

Most storage vendors have created products around information life cycle management but haven't provided enough relationship among the rules of managing content cost, policies and procedures for valuation, context and reducing backlogs. Enterprises have enabled end users to become "content-aholics." Kazeon blazes a path through the files stored multiple times in multiple locations and relates extrapolated metadata to a rational set of policies toward managing unstructured content with the same rigor as data. Kazeon shows that effective tags and policies (business rules) can quickly be applied to cut costs and add value from a large body of poorly described and poorly managed (and expensive) information. And, it does all this at a relatively low cost and fairly fast.

Challenges: Even with some key partnerships (including NetApp and Google), Kazeon faces competition from many vendors and might become part of the storage software arsenal by acquisition. Kazeon also has an Extensible Markup Language repository that competes with basic content service providers, such as Oracle, and even some more-broadly capable ECM suites. However, the biggest challenge is getting enterprises to address unstructured information and set policies that can be applied backward as well as forward before implementing a strategy or set of technologies that won't do as well as they could have with valuation, reduction and policy as starting points.

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Who Should Care: Enterprise architects and business leaders interested in applying process optimization and cost containment principles toward improved enterprise information management should take a closer look at Kazeon.

Analysis by Toby Bell

2.6 MessageGate

Bellevue, Washington (www.messagegate.com)

Why Cool: MessageGate offers a suite of e-mail governance tools that includes content filtering and policy management. It delivered MessageGate Policy Enforcement in April 2005, with the MessageGate Archive Categorization and Activity Profile service following soon afterward. The product has been integrated with Symantec's Enterprise Vault, one of the leading e-mail archiving solutions.

Although many vendors are promoting categorization technology, MessageGate has developed some special capabilities that enable the identification and isolation of e-mail messages that need not be retained in long-term archives. As more companies move to the creation of e-mail archives for legal discovery, the size of these archives is growing at an alarming rate. MessageGate has determined that confirmations, alerts, system messages and newsletters account for more than 20 percent of the legitimate e-mail that companies receive. Using MessageGate Archive Message Categorization, companies can automatically identify these messages and move them to a special archive file with a short deletion date, reducing the growth rate of the primary archive.

Challenges: Selling the broader governance toolset is a challenge for this company because the field is new and, unless a company has already discovered an area of risk, there is little understanding or much denial of the risks that are present in corporate e-mail systems. MessageGate's offering is built on components that have different competitive environments and buyers, and are at different positions in the market life cycle. Company marketing is targeting too many markets for a small company. MessageGate needs to focus on its unique capabilities to prospects and potential reselling partners. The bulk of the e-mail archiving and policy management market is focusing on basic archive capture or holding out for tools that can manage yet-to-be-defined policies.

Who Should Care: CIOs, Microsoft Exchange and storage administrators looking to reduce the growth rate of their e-mail archive without affecting the credibility of the store will be interested in the MessageGate Archive Categorization product. The experience gained using the MessageGate product to remove messages, such as frequent flyer statements, will educate IT personnel as to other opportunities to prune the archive or better categorize other messages for variable retention policies. For CIOs unclear as to the value of e-mail policy and categorization tools, the MessageGate Activity Profile service is a low-risk way to see what the company can do while learning enough about what is going on in the corporate e-mail environment to justify the product purchase.

Analysis by Carolyn DiCenzo

2.7 QBInternational

Larkspur, California (www.qube.com)

Why Cool: QBInternational develops custom game-based e-learning systems and offers Qube, an on-demand learning game management system. It includes several components, such as QBooks for content delivery, QGames for game frameworks customization, QLibrary for learning analytics, QLibris for online authoring games and Challenge Arena for learner's motivation through competition using scoring areas.

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QBInternational enters the e-learning market using an innovative learning game-based solution at a time when the need for more-engaging learning content and more-interactive learning activities has become more critical for companies adopting and extending e-learning initiatives to retain and attract customers, employees and partners. Its products enable learners to receive new ideas, apply these ideas to a task and receive feedback on their performance. Companies can apply gaming principles to motivate people to learn and improve business innovation.

Challenges: Some technology components are proprietary, due to lack of standards for gaming technologies, which limits seamless integration with other e-leaning solutions (for example, legacy software and authoring tools). QBInternational may not survive as an independent company; however, it may be noticed by larger vendors for its visionary capabilities.

Who Should Care: Chief learning officers, product marketing executives, sales executives, training managers and IT leaders who are responsible for e-learning initiatives would be interested in QBInternational.

Analysis by Waldir Arevolo

2.8 X1 Technologies

Pasadena, California (www.x1.com)

Why Cool: X1 Technologies' search provides a Windows application that searches multiple data types on a personal desktop (for example, files, e-mail and contacts). X1 also provides an enterprise version that searches information beyond the desktop. It provides the technology underneath Yahoo Desktop Search, a free consumer-targeted desktop search application.

X1 was not the first vendor to build desktop search, but its implementation stands out as one that provides a combination of ease of use, stability, relevance of search results and general usefulness. It also has introduced capabilities to enable IT organizations to help manage desktop search. Major vendors (such as Microsoft) have been slow to recognize the user problem of finding information lost on desktops. X1 has provided a good application that has increased information worker productivity.

Challenges: As Microsoft rolls out Windows Vista (even without WinFS, Vista will have more desktop search built in), X1 and others will face more free competition as Google and others continue to enhance their free consumer-focused desktop search applications. X1 needs to better leverage its Yahoo partnership to maintain its position.

Who Should Care: Information workers interested in their own high-performance potential should use X1 or other desktop search tools immediately. IT departments looking to provide desktop and enterprise search today should evaluate X1.

Analysis by David Mitchell Smith and Whit Andrews

Acronym Key and Glossary Terms

ECM   enterprise content management

EOL   Edgar Online

JSR   Java Specification Request

SEC   U.S. Securities and Exchange Commission

XBRL   Extensible Business Reporting Language

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