Aragon Research

Topics: Content Management, Social Software
Issues: What are the best practices for managing content across the enterprise?
Who are the social software providers and how will they navigate a crowded market?

Yammer Ignites the Race for the Social Workplace with OneDrum Acquisition

Summary: On April 11th, Yammer announced the acquisition of Scotland-based OneDrum, which offers desktop file sync and real-time, multi-author content editing and collaboration for Microsoft Office documents.

Event: Yammer announced the acquisition of OneDrum on April 11th via a press release. Terms were not disclosed.

Analysis: Content is the secret sauce of an enterprise social network (ESN), and the acquisition of OneDrum will make it easier for Yammer users to access, edit and collaborate on Microsoft Office documents without having to leave their Yammer ESN Group. While this move will enhance Yammer's core ESN offering, it will also position them to be a social workplace provider, and when combined with existing content authoring tools, will allow them to compete with other workplace offerings such as Google Docs and Microsoft Office 365.

While OneDrum's feature set was not complete at acquisition, Yammer indicated that the feature set and integration with Yammer ESN would be completed with the Yammer Summer Release for file sync, and the Yammer Fall Release for real-time collaborative editing of Microsoft Office documents.

The announcement by Yammer comes on the heels of similar announcements by Box (see Aragon Research First Cut 2012-FC5, "Box

OneCloud will Challenge Google and Microsoft") and others, such as the 2011 acquisition of Versly by Cisco.

Enterprises have often looked at content creation, content management and social networking as separate and distinct initiatives. Cloud computing and new technology are helping to change that, since users can now collaborate and edit content on the fly, and automatically store the updated content in the ESN group they are working in (i.e., round-trip editing/storage).

Users will be attracted to this new way of working given the reduced complexity and higher speed of interaction that it makes possible. For geographically dispersed teams, it can significantly enhance productivity.

The long-term roadmap for ESNs is to be the core of a collaboration architecture, and this move by Yammer represents a trend that others should emulate. Aragon Research believes it also represents a shift to a *social workplace* in which an ESN, authoring capabilities, real-time collaboration and content management are merged. This shift also represents a threat to the old way of working, and should make enterprises rethink how they license office suites in the future.

Given this shift, enterprises can begin to segment users, since not all users will need to have the same class of authoring tools (e.g., some can stay on older versions, while others can use lightweight editors on tablets). All of

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this has the potential for significant savings for enterprises.

Aragon Advisory: The shift to a social workplace is underway, and with it will come simplified and more efficient ways of working. Enterprises should take a hard look at their overall approach to work and the tools they are using to enable their people to accomplish that work.

Enterprises should evaluate Yammer and other ESN providers who are making investments in their suites that can help enterprises make the shift to a cloud-enabled social workplace.

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