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Micro sharing. Macro results.

Enterprise Microsharing Tools Comparison

Nineteen Applications to Revolutionize Employee Effectiveness

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micro-shar-ing

- social networking tools and systems that enable listening, awareness, communication and collaboration between people, through short bursts of text, links, and multimedia content.
- surprisingly powerful way to connect people to one another for corporate benefit.

Between the beginning of August 2008 and the end of October 2008, the field of microsharing (also referred to as microblogging) dramatically expanded in size and scope.

This report attempts to capture the state of the market in early November 2008. The information contained here was created with the assistance of Peter Kim, Jim Benson, Dan Martell, Michael E. Gruen, Steve Mann, Chris Brogan and Marcia Conner who reviewed drafts and provided edits, suggestions and general support.

To be included in announcements about future releases of this report and additional reports that go into more depth, please visit www.pistachioconsulting.com.

Executive Summary

As the economy toughens, companies must function more efficiently. Travel budgets often suffer the first cuts, leaving geographically decentralized teams with an urgent need to replicate both structured and unstructured time together. Better collaboration tools jump from nice-to-have to core and crucial.

Concurrently, employees see the collaboration, networking, problem-solving and other productivity benefits of web 2.0 tools and want to apply them at work. These tools directly contribute to knowledge capture and management as workforces are scaled back and baby boomers retire, and they boost motivation and retention, especially among millennial generation employees.

CIO magazine's October survey of 243 IT executives found three-quarters plan to freeze or cut their IT budgets. There is a critical need for cheaper, more versatile ways for information to flow within the enterprise. Enterprise-grade versions of Twitter may be the low-cost solution that fills this need.

Twitter is a social networking, communications and publishing hybrid used to exchange short bursts of information within formal and ad-hoc one-to-many networks. Accessible from many different interfaces on both computers and mobile devices, the service adapts to diverse communication styles and settings. Twitter has proven its value in diverse business setting and is being taken seriously as a business tool that shares knowledge, connects people and spreads ideas. Twitter and similar applications are often referred to as "microblogging," although we suggest "microsharing" as a more apt descriptor.

Microsharing for organizational communication and collaboration fundamentally changes how employees interact with others and grow their professional capacity. Microsharing connects people in ways that promote mutual support, rapid networking, inspiration, mentoring and idea exchange.

Departmental Applications	Solutions and Advantages	Collaboration Results
Marketing and Sales	Increased/Improved:	Solve problems faster
R&D and Innovation	Corporate intelligence	Bridge silos
ERP	Knowledge management	Flatten hierarchies
HR	Best practices sharing	Reduce email clutter
G&A systems	Professional network value	Harness loose ties
Facilities	Motivation and retention	Align interests
Customer	Professional development	Increase productivity
Internal communications	Mentoring	"Water cooler" intelligence

When integrated with enterprise software and other core business applications, microsharing can fundamentally improve operating efficiency, employee retention, company culture and professional development for individual and team contributors.

SAP, IBM, Oracle, Guitar Center, Hot Topic, Best Buy and other companies are testing (or have been using for a year or more) versions of microsharing tools. A Twitter-like tool called Yammer, expressly designed for private collaboration within companies, won top honors in 2008 from startup competition TechCrunch50. Employees from 10,000 companies are already on Yammer. Probably yours, too. Many other applications have been announced and are available for testing from other vendors.

Pistachio Consulting presents the first preliminary matrix comparison of 19 publicly announced enterprise microsharing applications. In this analysis we explain the significant differences between them and provide guidance on tool selection criteria. Additional briefings will be available for purchase or subscription as our research progresses.

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Introduction

Pistachio Consulting began to explain the potential of microsharing applications for corporate internal collaboration and communication in August 2007 as part of our conversations with leaders. More and more actively, enterprise 2.0 and technology thought-leaders have begun to take notice of its potential and conversations have steadily grown.

As with any strong personal productivity tool, businesses have started to recognize the power of Twitter and have begun to seek enterprise-quality microsharing tools for themselves.

Microsharing collaboration integrated with other enterprise applications establishes a capillary-like framework to quickly and efficiently pass information between individuals and systems, speeding core business processes.

The questions we receive now mostly focus on discerning which application will meet an organization's needs given the rapidly expanding array of options.

We researched the 19 publicly announced enterprise microsharing applications and present them here side by side. We explain the significant differences and provide guidance on what to consider when selecting an application. This analysis constitutes the first attempt to define, compare, organize and analyze application players in the space, and can be used by companies to understand how to select appropriate microsharing solutions for their unique situations.

We compiled our matrix from independent web research, as well as surveys and interviews directly with microsharing vendors. Our matrix, originally published September 25, 2008 on Mashable.com, compared 15 applications and provided the first public information about several brand new entrants to the field. This document presents and classifies the applications, discusses advantages and reservations for each, details notes on what we asked and why it matters, and presents an expanded matrix — 19 applications and 19 criteria.

To read more about the rationale and use cases for enterprise microsharing, please see the reading list at www.pistachioconsulting.com/microsharing/enterprisereading.

Key Findings

Twitter, Inc. may provide some kind of enterprise offering.

Twitter is the microsharing industry leader, the de-facto lingua franca for related applications and has made significant strides in scalability and uptime.

“Private networks that do private or company-internal sharing via Twitter are on the horizon,” said Twitter co-founder, Ev Williams.

Enterprise internal microsharing tools should be interoperable with Twitter.

This reduces complexity while maintaining external and internal relationships. Twitter supports a worldwide user base and represents staggering potential value from relationships, interactions, data flow and more.

Tapping into the hundreds of tools, applications and services in the existing Twitter ecosystem permits more efficient rollout of features for your internal microsharing system.

Your employees are likely already microsharing.

Some of the new enterprise tools are available with a self-service model that presents a twist in how fast and how far they are adopted. Employees and ad-hoc groups that share an email domain can instantly establish their own internal microsharing networks then get started right away. This applies pressure on companies to assess demand for microsharing and formulate an approach that meets their interests.

Yammer and QikCom pose a serious challenge to enterprise IT departments trying to tightly control application rollout and who refuse to accept external or porous firewall solutions for enterprise 2.0.

Best practice: Social media and other digital communications executives should join their domain's Yammer group to discover internal talent that is already engaged and aware in the space.

Identica and other open source solutions offer another self-service model.

While not as fast and convenient as joining Yammer or QikCom, Identica's model also applies grassroots pressure for adoption of enterprise microsharing that corporations should understand and consider. Popular Twitter client Twhirl supports Identica, which gives them unique positioning as self-serve, private, free and interoperable with Twitter.

Case studies are on their way.

In-depth case studies and results are not generally available yet, although Trillr has released some preliminary usage information. From our market intelligence, we expect the first case studies to emerge over the next three months. We will track and report on them at www.TouchBaseBlog.com. We welcome the opportunity to work with any company testing microsharing so we can assess the effort and help publish your results.

Different forms of microsharing have been in place for about a year at IBM, Guitar Center, and Hot Topic, and in earlier stages of testing at SAP, Oracle, Siemens, Best Buy, wherever Identica instance has been installed, at 10,000 companies reported to be using Yammer and at other companies that have not yet publicly disclosed their testing.

Applications Overview

This overview offers a brief introduction to each application. Detail follows in subsequent parts of this document, especially the Enterprise Microsharing Matrix.

BlueTwit: IBM's internal microsharing client in use since 2007. Built for IBMers to see what can be done with microsharing internally and may be sold to IBM customers in the future.

Communote: Topic-centric microsharing tool from Communardo offered in free, commercial and enterprise software as a service (SaaS) plans with a migration path to on-site installation. It has both LDAP integration and access control.

ESME (Enterprise Social Messaging Experiment): Secure, scalable microsharing platform developed by an ad-hoc group from the SAP SDN and offering tight integration with enterprise infrastructure.

Headmix: Highly configurable and customizable, albeit complex, tool that integrates into routine workflow and adds a social layer around existing applications.

Identica: Open source application developed by Control Yourself, Inc. that can be installed in-house and used within the firewall. Interoperable with other Identica installations and with popular Twitter client Twhirl. Public instance at Identi.ca.

Iron Feed: Microsharing application built using Microsoft.net and specifically designed to integrate with AD directory systems. Designed for scalability and performance, but not yet in pilot testing.

Jisko: Open source microsharing platform for the Spanish-speaking world, deployable in any language.

OraTweet: Oracle's internal microsharing client for groups or individuals that may someday be available to external clients.

OpenMicroBlogger: Open source application conforming to the OpenMicroBlogging protocol (for interoperability) and including an IDE and app store.

Present.ly: Company-administered microsharing application from Intridea that

supports groups, media sharing and other business-focused features.

Prologue: Wordpress (blogging software) theme created by Automattic that allows any group to interact in a microsharing-like private, secured environment. Available under GPL.

QikCom: Free self-serve microsharing application that groups registrants together by their common company email domain and permits administrators to claim and secure the network. Includes app store.

SocialCast: Private, online SaaS business microsharing application with company administration features and the ability to support RSS and other inputs. Incorporates characteristics of many social media platforms.

Socialtext Signals: Internal microsharing application built to integrate with the Socialtext 3.0 social software platform. Incorporates task completion and workflows as integral parts of the shared streams.

Status: Microsharing application for groups and companies developed by Shiftedfrequency that aggregates short group messaging shared loosely in a common space without concepts like "following" or direct messages.

Trillr: Trillr is a Twitter clone built by CoreMedia for their own internal use. It incorporates video, groups and interoperability with Twitter.

Twitter: Twitter is the most prevalent and popular public microsharing application, and the role model or point of departure for most microsharing applications.

Yammer: Freemium self-serve microsharing application that also groups registrants by their common company email domain. Companies may pay for administrative control. Yammer groups already exist for 10,000 companies.

Yonkly: Open source microsharing platform with support for images, groups and threaded conversations.

Classifications

To facilitate comparison and understanding, we group the 19 applications in this report into six classifications. This is a preliminary classification based on outward characteristics and either stated or demonstrated features. As more is known about each application, the schema may evolve.

<p>Pure-Play Microsharing</p> <ul style="list-style-type: none"> ▪ Communote ▪ Iron Feed ▪ Presently ▪ Socialtext Signals* ▪ Trillr ▪ Twitter 	<p>Enterprise-Built</p> <ul style="list-style-type: none"> ▪ BlueTwit ▪ ESME ▪ OraTweet
<p>Open Source Microsharing</p> <ul style="list-style-type: none"> ▪ Jisko ▪ Identica ▪ OpenMicroBlogger ▪ Yonkly 	<p>Pseudo Microsharing</p> <ul style="list-style-type: none"> ▪ Prologue ▪ Status
<p>Integrated Microsharing</p> <ul style="list-style-type: none"> ▪ Headmix ▪ Socialcast ▪ Socialtext Signals* 	<p>Self-Serve Microsharing</p> <ul style="list-style-type: none"> ▪ QikCom ▪ Yammer

* depends on whether Signals is integrated with the Socialtext 3.0 suite

Classifications Detail

Pure-play Applications: Communote, IronFeed, Present.ly, Socialtext Signals*, Trillr, Twitter

Microsharing platforms similar to (and including) Twitter, but with different modifications, approaches and capabilities for enterprise use. All are capable of supporting collaboration and communication between employees. It's been reported that a standalone version of Socialtext Signals is being tested, but may not come to market in that form given the company's emphasis on workflow integration. Twitter can be used for private collaboration by networking private accounts only to one another, and they have indicated to us a more robust private group feature is on the way.

Enterprise-Built: BlueTwit (IBM), OraTweet (Oracle), ESME (SAP/Siemens)

These applications are evolving within large environments that provide substantial growth opportunities. They are developing organically within the organization they aim to serve. They each face challenges getting their parent company to accept and support the project and may eventually consider marketing it to other companies. In addition to ESME, SAP is experimenting with Identica, Yammer and at least one other home-grown solution.

Open Source: Identica, Jisko, OpenMicroBlogger, Yonkly.

(ESME; Prologue have open source aspects but fit better into other classifications)

With both open source platforms and licensing, these solutions have a low cost to install, but may require inhouse resources with the technical know-how to put them to work. Identica's public-facing application offers them a head start because external tools like Twhirl have already been adapted to work with it. They also have a relatively large public user-base and a live test implementation running at other companies including SAP. There are two other known open source applications, Sweetter 2.0 and Twoorl, but insufficient information was available to include them in this research.

Pseudo-Microsharing: Prologue, Status

When an application lacks many of the features other solutions in its space offer, it seems awkward to consider it part of that field. These applications market themselves as part of the microsharing space, though, and may serve some organizations' unique needs so we have included them here. Prologue can be set up quickly, but lacks mobile integration and other features that characterize microsharing. Status, for example, simply pools all users' updates in a single shared space.

Integrated Microsharing: HeadMix, Socialcast, Socialtext Signals

HeadMix and Socialcast are much more complex applications with characteristics of many social media and social networking tools combined together. From reports, Socialtext Signals could be a standalone application, but its premise is to integrate with the Socialtext 3.0 suite of enterprise 2.0 services. Clarity, simplicity and compelling use cases will be essential for successful implementations of these possibly more complex applications.

Self-serve Microsharing: QikCom, Yammer

In an interesting twist, these applications are private microsharing applications for enterprises, but they are spread like viral consumer applications because they are self-serve to the people wishing to participate and because early adopters invite their co-workers to join. In the case of QikCom, an administrator can invite participants who lack the email domain (@company.com) that Yammer requires. In practice this is not a huge advantage because companies may also give contractors access to a Yammer instance by assigning email aliases to be used for access.

Additional Classifications

As a point of reference, we also grouped these applications by what they offer and what they lack.

Support SMS		Lack SMS support	
<ul style="list-style-type: none">▪ Headmix▪ Identica▪ Iron feed▪ OpenMicroBlogger▪ OraTweet	<ul style="list-style-type: none">▪ Presently▪ Status▪ Trillr▪ Twitter▪ Yammer	<ul style="list-style-type: none">▪ *BlueTwit▪ *Communote▪ *ESME▪ *Jisko▪ Prologue	<ul style="list-style-type: none">▪ QikCom▪ *Socialcast▪ *SocialText Signals▪ *Yonkly
LDAP, AD, or other Directory Integration		Lack Directory Integration	
<ul style="list-style-type: none">▪ BlueTwit▪ Communote▪ ESME▪ Headmix▪ Iron Feed	<ul style="list-style-type: none">▪ OraTweet▪ Socialcast▪ Socialtext▪ Signals▪ Trillr	<ul style="list-style-type: none">▪ Jisko▪ Identica▪ *OpenMicroBlogger▪ *Present.ly▪ *QikCom	<ul style="list-style-type: none">▪ Status▪ Twitter▪ Yonkly▪ Yammer

**denotes planned for in future release.*

Advantages and Reservations

	Advantages	Reservations
Pure-Play Microsharing		
Communote	Solid combination of the generally accepted microsharing features, specific enterprise adaptations, and innovations like RSS support, tagging and filtering.	Awkward name and it will have to catch up to other players with branding and visibility. Its current lack of desktop and smartphone clients may be a hindrance.
Present.ly	Offers internal deployment and company control.	Which could be a problem relative to self-serve applications if companies are slow to be convinced of the value.
Trillr	Attractive user interface, offers groups and video built right in, and is reported to be very robust.	Go-to-market strategy is unclear and although the application has been available for a while, we know of no external trials.
Twitter	The gold-standard with the most available tools, the strongest standing and worldwide familiarity.	Lacks private groups, and still hasn't shaken a reputation as being unstable.
Iron Feed	Built on .net and integrates with Active directory. Designed specifically for enterprise use.	Not yet deployed, and unlaunched is unproven.
Enterprise-Built Microsharing		
BlueTwit	Deployed and tested for longer than all apps except Twitter. IBM also has the largest employee-base and wide customer relationships for possible future external sales.	Not much is known about the application itself or how much internal support the program receives.
ESME	SAP, Siemens and their respective customer bases constitute an enormous proximate market of engaged and collaborative teams to learn from.	Many stakeholders could either speed or hamper implementations.
OraTweet	Associated with the APEX platform as a distribution channel and now recognized as having potential as an external-facing product.	We have not yet seen the application and do not know about its internal support.
Open source Microsharing		
Jisko	Open source, with a complimentary wiki tool and several instances in production (Gospelr.com, Jisko network).	Much of their documentation is written in Spanish, which could be limiting for an English-speaking audience.
Identica	Open source, can federate groups together, interoperable with Twitter and uses the desktop client Twhirl.	Unsure if this can gain critical mass given the technical deployment will probably not be as simple as some of the commercial applications.

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Advantages

OpenMicro Blogger Open source and can federate with Identica. Offers IDE and app store.

Yonkly Support for images, groups and threading.

Reservations

Currently much less brand awareness and smaller deployed base than Identica.

Concern that purely open sourced players lack marketing support.

Pseudo-Microsharing

Prologue Open, familiar platform and self-service setup requiring little technical know-how. Very different than what we think of as a microsharing platform and doesn't support SMS.

Status Might focus solely on the small and medium sized business market. Lacks the followers/following framework already popular (and expected) in this space.

Integrated Microsharing

HeadMix Product is very configurable and focused on integration with other applications. Best Buy (a flagship customer) and HeadMix' own employee base have been using the system for almost a year. The product is fairly complex, which may lead to user resistance if it is not properly configured and streamlined.

Socialcast Has had deployments since 2007 and incorporates aspects of other services including Facebook and Friendfeed. Cost and complexity higher than other applications, but capabilities are higher too.

Socialtext Signals Parent company with relationships and existing deployed base of other products. Has been tested for six months internally and has workflow integration. Unclear if it will be available as a standalone or only integrated with the full SocialText 3.0 suite.

Self-Serve Microsharing

QikCom Allows organizations to invite in people with other email domains and is free. Will it be distinguishable enough from Yammer to gain traction?

Yammer Offers self-service deployment, and was created by an experienced, well-connected team. Unknown how groups and contact management will scale at large numbers. Because of self-serve model, questions remain if IT and enterprises themselves may resist or block it.

Application	Company	Description	Inside Firewall	Directory Integration	Twitter's Functions	Groups	Location	Sharing	SMS
Classification: Pure Play Microsharing									
Communate	Communardo Software GmbH	Communate.com is a topic-centric microsharing tool for professional users with free, commercial and enterprise SaaS offers and a migration path to on-site installation. Special enterprise features e.g. LDAP integration, access control etc. Iron Feed was designed and built using enterprise tools. Careful attention has been paid to scalability and performance.	+	+	Most	+	-	All	Future
Iron Feed	Iron Feed		+	+	+	+	-	Links	+
Present.ly	Intridea	Present.ly is company-administered and expands on the premise of Twitter with groups, media sharing and other business-focused features.	+	Future	+	+	+	All	+
Trillr	CoreMedia	Trillr covers communication that wouldn't have happened otherwise, things you wouldn't put in an email. It creates an emotional nearness and allows us to know a lot more about each other.	+	+	Most	+	+	Links, Video	+
Twitter	Twitter, Inc.	Twitter is a service for friends, family, and co-workers to communicate and stay connected through the exchange of quick, frequent answers to one simple question: What are you doing?	-	-	N/A	-	+	Links	+
Classification: Enterprise-Built Microsharing									
BlueTwit	IBM	Internal system in use at IBM since 2007. Built as a play space for IBMers who wanted to see what can be done with microblogging internally.	+	+	Most	Channels	- ¹	Links	Future
ESME³	SDN (SAP/Siemens) (open source)	Secure, scalable microsharing platform that allows people to meet in a business process context, enabled by tight integration to corporate infrastructure (LDAP, etc).	+	Future	- ⁴	Actions	-	Links	Future
OraTweet	Oracle	Oracle's internal micro-blogging tool that enables users to "follow" messages from groups or users	+	+	+	+	+	Links	+
Classification: Open Source Microsharing									
Jisko	N/A (open source)	Open-source (Aferro GPL) microblogging platform for the Spanish-speaking world but deployable any language.	+	-	+	Not yet	+	All	Future
Identica	Control Yourself, Inc. (open source)	Identica is an Open Source microblogging tool that implements the http://openmicroblogging.org standard, which allows users on one server to follow the streams of users on other servers.	+	Future	+	Future	+	Links	+
OpenMicro Blogger	Megapump, Inc. (open source)	Microblogging platform with Apps and a graphical IDE. Alternative implementation of Identica's ww.openmicroblogging.org protocol, so it supports cross-subscribing with any Identica instance.	+	Future	+	+	+	All	+
Yonkly	N/A (open source)	Open-source microblogging platform with support for images, groups and threaded conversations.	+	-	Most	+	-	Links, Photos	Future
Classification: Pseudo-Microsharing									
Prologue	Automatic (open source)	Wordpress theme that allows any group to interact in a microsharing-like environment. Theme is available under GPL	+	-	-	-	-	All	-
Status	Shiftedfrequency	Status lets groups of people keep in touch by showing group members what each of the others is doing and where they are.	- ⁷	-	No following or DM	+	+	Links	+ ⁸
Classification: Integrated Microsharing									
HeadMix	HeadMix, Inc.	Lightweight, on-demand messaging platform that promotes intuitive knowledge-sharing inside the enterprise via the web, email, mobile and SMS. There is no need use additional applications – it fits into the daily existing workflow.	-	+	Most	+	+	All	+
Socialcast	Socialcast	Socialcast is a messaging and collaboration platform that aggregates, organizes, and broadcasts the collective intelligence of a workforce. Integrates with email, IM, and existing enterprise applications.	+	+	+	Future	+	All	Future
Socialtext Signals	Socialtext	Socialtext Signals integrates with the new Socialtext 3.0 suite of internal social networking tools for the enterprise. Internal microsharing application built upon Socialtext's existing social software platform.	+	+	+	+	-	Links	Future
Classification: Self-Serve Microsharing									
QikCom	QikCom, Inc	Micro-messaging for enterprise and a TabStore with additional business apps. Free for employees to sign up and free for admins to claim/secure the network.	- ⁷	unknown	+	+	-	Links	-
Yammer	GENI	Self-serve enterprise microsharing. Networks are automatically created by combining all users with common company domain emails. Networks are restricted to people in same domain.	- ⁷	-	+	+	Not Yet	Links	+

KEY **+ Yes**
- No

- Shows employee's permanent location from employee directory. IBM already has location awareness via "Sametime."
- It could be made interoperable with Twitter, but isn't.
- ESME is short for Enterprise Social Media Experiment.
- ESME not positioned vs. Twitter. Features include OpenID auth., messaging, subscriptions, conversations, tagging, trending, and tracking.
- OraTweet can cross-post to Twitter and retrieve latest Twitter updates for a user thru PL/SQL calls, feature is currently disabled.
- Once publicly released, OraTweet will be available with the terms of use described at bottom of this page.
- Not deployable behind firewall, but this capability may be added if there is significant demand.
- For posting updates only.
- Zappos.com at ~1600 employees is the largest company we know of using Twitter primarily to connect employees to each other.
- Present.ly is built on Ruby on Rails with a custom-built and tailored indexing and notification system.

Tools for Microsharing in the Enterprise (con't)

IM	Desktop Client	Smart-phone App	Twitter Integration	Underlying Software Platform	API	Twitter Compat. API	Largest Co.	Largest Group	Pricing /month	Additional Notes
Future	Future	Future	Future	Java Enterprise Edition	+	Future	150	40+	\$0-5 per user/month	Smart tagging and filtering tools for micro-content. Links into corporate directories via LDAP. Extensive support of RSS. Mail-In-Option available. Micro-clients and API for integration into portals and applications under development. Public beta will start in November.
+	+	-	+	Microsoft .NET	+	+	N/A	N/A	TBD	Plugs into Active Directory to take advantage of existing AD groups (including nested groups). Compatible with the Twitter API and includes Twitter user migration tool. No deployments yet.
+	Future	SMS app, Future	+	Ruby on Rails, Erlang/Ejabber and XMPP ¹⁰	+	+	261	261	~\$1/user	Launched Sep 2008 at Web 2.0 Expo. "Freemium" price structure. Ruby on Rails with custom indexing and notifications. Tools available to cross-post simultaneously to BlueTwit and Twitter.
Future	+	+	+	Django framework	+	+	500-1000	400	TBD	Developed for internal use by German CMS company CoreMedia.com, Trilr has shown interesting usage and adoption statistics, including a reduction in email congestion.
Future	Many	+	N/A	Ruby on Rails, MySQL	+	+	1600 ⁹	~3 million	Free	Private networks that do private or company-internal sharing via Twitter are on the horizon. Many tools an options built around the API.
+	+	-	- ²	J2EE	+	-	360,000	1200+	TBD	Tools available to cross-post simultaneously to BlueTwit and Twitter.
-	+	Future	+	Scala / Lift on Netweaver	+	Future	50,000	100+	Currently open source	Messages auto-refresh directly to the client. "Actions" mini-language for rules like "email me all messages containing this tag." Tag clouds and word clouds provide a sense of what's going on. Will have secure groups in the future. Open-source (Apache license)
+	-	mobile version	+	APEX (Oracle)	+	+	85,000	100s	Free ⁶	To be released to public as a free APEX packaged application. Can be deployed on new or existing Oracle DB instance.
+	Future	JMS/ J2ME	+	PHP 5 and MySQL	+	+	unknown	unknown	Free	Twitter-compatible API. However, Jisko's own API uses API-keys (not passwords) for authentication. www.Gospelr.com is built on Jisko.
+	+	+	+	PHP/MySQL	+	+	50,000	24,000+	Free	Identica integrates into Twihir, making it possible to update both from a single client. Full-text contents and users search, and public stream for downstream aggregators. Being tested at SAP.
-	+	SMS app	+	PHP/MySQL/ PostgreSQL	+	+	1,000+	300	Free	0.2 release will support a full round-trip from Twitter. IDE permits businesses to create (and sell) custom apps. IDE is \$45 and apps are \$2+. MIT license.
Future	-	-	+	asp.net mvc	coming soon	Future	N/A	2500	\$49 flat or Free	www.isweat.com is the most prominent implementation of Yonkly. Installing your own instance of the open source software is free, the hosted solution is \$49/month.
-	+	+	-	WordPress (PHP)	+	-	unknown	unknown	Free	Not a true microsharing platform. Styles blogposts to appear like a microsharing timeline, but it's really just a group blog.
Future	Dashboard Widget	Future	+	Ruby on Rails	Future	Future	unknown; 600 groups	60	\$0-40	Status HQ is based on groups and does not have followers/following or DMs. A user can create up to 10 groups, but can be invited to join unlimited groups. 255 character limit (instead of 140). Just added "@replies"
Future	+	Future	-	Ruby on Rails	+	+	150,000	20,000	TBD per active user	Fully integrates into enterprise daily existing workflow. Ability to integrate custom applications. Makes customers' existing apps more valuable by adding a social layer around them and integrating with email (Outlook), SharePoint, etc.
+	Future	+	+	Ruby on Rails	+	+	90,000	15,000	5 users free; \$1-5/user	Strong emphasis on microsharing, but includes characteristics of Facebook (profiles), Friendfeed ("likes"), Twitter (microblogging), LinkedIn Answers, BrightIdea and Blogging. Integrates with Gmail and can incorporate any web feed.
Future	open API	-	- ²	unknown	+	+	unknown	50	TBD	Strong focus on integrating with other applications and becoming a part of routine workflow. Tasks completed will be a part of the user's microsharing stream.
-	+	Future	-	PHP	+	+	60,000	100	Free	Additional business apps available in the TabStore
+	+	+	-	Ruby on Rails framework.	+	-	unknown	unknown	Free or \$1/user	Won TechCrunch50; reports 10,000 people in 2,000 firms signed up the first day. Basic service is free, employees sign selves up. Companies can subscribe to administer and control their networks. Reported 200 companies/4,000 paying users as of Oct. 2008.

OTHER/FUTURE APPLICATIONS: Sweetter 2.0 & Twoort are other open-source clones. Jitter is Janssen-Cilag's internal system. Additional unconfirmed/likely commercial applications are in the pipeline.

CRITERIA AND FEATURES, DEFINED

Application name of the application

Company name of the company

Description brief positioning statement

Inside Firewall can it be deployed inside a corporate firewall?

Directory Integration can it integrate with company directories (LDAP/AD/etc.)?

Twitter's Functions does it include most of Twitter's basic features?

Groups can it permit groups or the functional equivalent

Location can users signify and easily update their location

Sharing can users share links, photos, videos, audio and/or files?

SMS can it send and/or receive SMS text messages?

IM can it be read and updated through an IM client

Desktop Client can it be used with a desktop client? (custom or existing)

Smartphone Application

Twitter Integration feeds messages into or out of Twitter?

Underlying software platform what is it built on?

API does it have a publicly accessible API for developers

Twitter Compatible API is the API compatible with Twitter's such that apps can be easily repurposed

Largest Company size of largest company testing the application (even if a small deployment)

Largest group what is the largest known group deployment

Pricing all prices are per month

Notes additional comments on the service

What We Asked and Why

This is a brief review of some of the key questions we asked and why they matter.

Do you support SMS?

Short Message Service (SMS), the communications protocol allowing the interchange of short text messages between mobile devices, has become one of the most crucial features of the more successful microsharing applications because it takes the power of real-time information sharing out of the office and into the hands of people working in the field. We were surprised that SMS capability is absent or only listed as "future" for nine of the 19 tools.

Mobile social networking is a major advantage of microsharing, especially within companies for executives, retail, factory, warehouse and other employees who spend little time in front of computers. All employees benefit from mobile access while traveling, at events or even in meetings down the hall from their usual workspace. Effective smartphone applications and mobile optimized sites can compensate for lack of SMS, but Twitter certainly benefits from having all three options for the mobile user.

Does your application integrate with Twitter? (Can users send/receive public tweets while using it?)

Direct Twitter integration could prove important to application success because using two separate platforms to maintain internal and external relationships is cumbersome and inhibits efficient workflow. This would be akin to maintaining two separate email systems for correspondence between those colleagues inside and outside your company. Because many early adopters of enterprise microsharing will already be Twitter users and there are dozens of Twitter services, we were not surprised to see that 11 of the 19 applications offer Twitter integration.

Do you support groups?

Enterprises run on power supplied by groups. Applications that don't accommodate this basic organizational system fall short. We expect that any tool implemented will need to manage granularity and provide control to select which contacts receive which notifications. Although the every-contact-gets-everything approach works surprisingly well on Twitter, and we encourage implementations to include wide open spaces for random interactions and serendipity, vendors shouldn't underestimate this fundamental enterprise requirement.

How large is your largest customer?

We've noticed very little relationship between the size of the company and the number of users trying out the application. However, the simple fact IBM's BlueTwit has 360,000 potential users means that it could become the first enormous private deployment of microsharing. Headmix' largest customer Best Buy, ESME's integration with SAP and by extension its wide potential base of customers and employees, and OraTweet's incubation at Oracle lend similar potential. Any application operating within an extremely large corporation could catch on, reach critical mass and generate significant lessons about outcomes, use patterns and scalability. Achieving high adoption rates at only small companies could be self-limiting, unless that is the intended strategy.

Do you use an open API? Is it compatible with Twitter's?

Technical developers seem to have almost unanimously understood that an open API is important for this class of tools so that creative, motivated individuals and groups will build applications that work with the system. As a separate question, we asked if each product's API is compatible with Twitter's, meaning that the new system can also benefit from the large number of tools that have already been built, deployed, tested, refined and popularized within the Twitter ecosystem.

Can your application be deployed securely inside the firewall?

Our conversations with large corporations indicate they look for tools that work inside a firewall. On the other hand, software as a service (SaaS) applications are rising in popularity and frequently enable a company to adopt new technologies more quickly than if they were brought in-house. All but five of the applications profiled are available inside the firewall, with Status and Yammer both indicating they would offer it if there was

sufficient demand. Note that when we refer to "internal use" of a tool, we are referring to private use between employees, not necessarily inside a firewall.

Do you support instant messaging?

People like microsharing via instant messenger (IM), and corporations where IM systems are already deployed may want to use those systems as their microsharing user interface (UI). We're also aware of XMPP's potential as a basis for interoperability in microsharing. ESME and prologue are the only tools not currently planning IM integration. Seven applications currently offer IM integration, eight are planning to in the future, and just four are not planning it. Twitter's IM integration has been unavailable for months and will not be back soon.

What is the underlying software platform?

While a third of the microsharing tools are built with some variant of Ruby on Rails, the remaining two-thirds have been created using a wide variety of languages, application frameworks and technical approaches. We asked this question because there is no single answer for robustness and scalability, but we believe organizations will want to know what will be compatible with the deployed base of enterprise software systems and platforms already in place, as well as the technical proficiency, when customization is required, needed to have on board.

How is your service priced/going to be priced?

We asked this to see if any trends had begun to emerge. While obviously an important deciding factor, but most companies had not disclosed their pricing structure. The question did tell us that there is a mix of free, freemium, free with paid applications stores, per-user and other potential pricing relationships. While Socialcast is priced substantially higher than others that have disclosed their pricing because it offers a full range of social media and social networking features.

Additional Notes

More tools will enter this space

In addition to these 19 tools, we're aware of two more open source applications and five unconfirmed but likely commercial contenders. Due to the popularity and perceived simplicity of Twitter, we expect that dozens if not hundreds of other aspirants exist.

We also anticipate that corporations will follow the example set by IBM, SAP/Siemens and Oracle in developing their own internal platforms. It is notable, although inconclusive, that Cisco recently acquired messaging company Jabber, Inc. Many other companies large and small have built or will build their own internal systems. Finally, although we could not find anyone doing this yet, other public microsharing tools like Pownce, Jaiku and Plurk might be usable for internal collaboration and communication.

What about white-label social networks?

There are well over a hundred companies building social software for use within the enterprises, often referred to as "white-label social networks." If some of these companies decide to build standalone microsharing applications, or add substantial microsharing features to existing products, their existing customer relationships could be a head start towards integration and employee adoption.

Adding the simplicity and accessibility of enterprise microsharing could be a strategic move for these companies if it can be shown to drive penetration rates for these applications within companies where they already have some deployed base.

The open question is how, when and which of these white label social network applications will enter this space with a new feature, plug-in or standalone product that sets it ahead of the field. Will recent activity in the space deter them or will the startups and open source platforms we've described (and those undiscovered) become acquisition targets/go-to-market strategies for the white label social networks?

Conclusions

Microsharing is becoming a significant enterprise opportunity. As budgets tighten, remote collaboration gains importance and employees at all levels ask, "Why not use networking and knowledge-sharing tools to improve our work?" The communications and collaboration potential these tools have for leveraging personal and team effectiveness is dramatic. The applications are inexpensive to run, save travel, lost time, email and other costs, unlock latent value and hidden knowledge, and increase employee productivity, motivation, retention and career opportunities.

Camraderie, water-cooler cohesiveness and fast sourcing of specialized solutions are among many strategic advantages to be gained by companies that adopt microsharing wisely. We're on the brink of a communications shift akin to the introduction of IM or even email into the corporate toolset. These represent low investment, high return enterprise 2.0 tools, and chances are good that your employees are already experimenting with them.

This market movement can be compared to a time when email was not well understood or widely employed within companies. Widespread growth of microsharing signals the beginning of something even larger. Microsharing, whether directive, business-focused knowledge exchange or humanizingly quirky sharing and network-building, builds the relationships, trust and camaraderie that can drive enterprise success to new levels. At a time when the economic health of our society is at the forefront of our thoughts, there's no better time to use tools that feel comfortable and naturally integrate into the way people work.

The presence of so many companies and applications in contention to populate this space underscores the urgency of the opportunity for companies to harness the productivity, mentoring, problem-solving and business networking power of microsharing tools.

This preliminary analysis is just a start. New applications will surface, feature sets will shift, and case studies will begin to suggest the full scope of the microsharing opportunity and the best practices needed to harness it. We will report on test implementations, results and larger deployment roll outs to better articulate where organizations should place their long-term investments.

Consider the wider landscape and begin thinking about the questions you should be asking application vendors, professional services firms and your own internal departments and key influencers. We strongly believe this is the harbinger of an enterprise technology shift.

About Pistachio Consulting

There's a lot of talk about "Twitter in the Enterprise" and many tool developers are building applications to deploy behind the firewall, but little is known about user uptake and promotion adoption. Our multidisciplinary practice guides clients and tools vendor through the implementation process to make the application function effectively and engage new users organically. We conduct research, test pilots, consulting and implementations that use microsharing as a social network and collaborative tool to connect employees.

Professional Services Include:

- Needs Assessment
- Tool and Vendor Selection
- Program Design
- Pilot Testing
- Implementation
- Leadership
- Program Design
- Community Administration

Pistachio Consulting's single focus on microsharing means you get the best expertise available, whether your need is for branding and market engagement or internal employee networks. We believe the market opportunity is large and best served by open innovation and decentralized initiatives. We deliver briefings, strategy, research and best practices to maximize business effectiveness, along with soup-to-nuts program development and training.

Request a consultation or learn more online at www.pistachioconsulting.com/services.

About Pistachio Research.

Future in-depth research will include detailed reviews, market assessment, screenshots and case studies where available. At every stage we will provide free summaries, single-purchase reports and the option of subscribing to current ongoing analysis. We will also be rolling out additional research products including case studies, recommended best practices and interviews with CTOs, CIOs and other technology professionals in the space.

Almost all Pistachio research includes free, publicly shared information and insights. The exception is privately funded research which will only be publicly released with the express permission of our research clients.

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