Market Guide for Employee Communications Applications

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Initiatives: Digital Workplace Applications and 1 more

The emerging market of employee communications applications to relay organizational and operational topics, including COVID-19, to their employees is overwhelming. Application leaders should use this Market Guide to identify evaluation criteria, shortlist vendors and ensure a strong ROI.

Overview

Key Findings

- Employee communications applications (ECA) enable stakeholders supported by application leaders to plan, create, coordinate, distribute, manage, execute and analyze the effectiveness of internal communications campaigns.

- ECA tools make it easier for organizations to reduce employee communications overload. It is a rising priority for internal customers of application leaders to improve the effectiveness of frontline and remote workers.

- Application leaders are making ECA technology decisions in a market where vendors come from different traditional end-user audiences, sometimes resulting in two or more solutions.

- ECA vendors are evolving to support multichannel and multiexperience communications with some vendors expanding into operational communications. Broadening the user cases and evaluation criteria application leaders need to consider.

Recommendations

Application leaders responsible for employee communications should:

- Establish use cases for ECA tools, identifying audience segments, channels, media and content types, campaign objectives and analytics by collaborating with stakeholders, especially those responsible for COVID-19 outreach.

- Select ECA vendors by assessing them against stakeholder requirements but also by including more subjective qualities, such as usability and employee experience. Sustain business value by leveraging employee feedback on their everyday ECA experience.
Market Definition

This document was revised on 28 October. The document you are viewing is the corrected version. For more information, see the Corrections page on gartner.com.

The employee communications applications market consists of vendors where a significant emphasis of the business model, brand messaging and product capabilities focus on employee communications. The solution value proposition emphasizes how better communications improves employee:

- **Engagement** — Through more effective information flows and employee experience at an organizational level.
- **Performance** — By facilitating more effective knowledge exchange to streamlined work activities at an operational level.

Solutions in this market are defined by their purpose (internal employee communications), by their target sponsor (nontechnical business users in formal roles as “communicators” to disseminate organizational and/or operational information) and by their broad functionality. Products are used to plan, create, schedule, coordinate, distribute, personalize, manage and execute campaigns, while measuring the effectiveness of internal communications.

Market Description

Employee communications applications support planned messaging campaigns that are top-down in nature (organizational-wide communications), or campaigns that are more lateral and mid-level communications related to business unit processes or cross-process functional areas (operational communications). Key technical attributes and capabilities include:

- Multichannel/multiexperience communication delivery capabilities including mobile app, intranet, email, messaging and digital signage.
- Campaign and workflow support for planning, creating, executing and analyzing communications delivery.
The core value proposition of ECA is to deliver a personalized communications experience that facilitates employee understanding and behavior change in ways that align with company goals, while providing employees the opportunity to provide feedback to management on those goals.

**Market Direction**

On the demand side, buyers working with application leaders are:

- Recognizing that COVID-19 identified inadequate capabilities to effectively reach out to employees, especially frontline workers, as it related to their pandemic response.
Aligning internal communications to other key strategies related to their digital workplace initiatives to improve business continuity and how they handle crisis and urgent communications.

Setting companywide direction (when in decision-making roles) when they decide on ECA tools (primary stakeholders are often in HR, corporate Communications, or executive leadership).

Connecting ECA decisions on technology and services to intranet and emergency mass notification investments.

Looking for solutions to specific business audiences (frontline versus office), communication types (organizational versus operational) and integration needs resulting in multiple products being used but desiring the least number of products possible to provide a consistent experience, consolidated analytics and reduced technology complexity.

Expect simple, intuitive and easy-to-use tools that allow them to plan, create, schedule, coordinate, distribute, personalize, manage, execute and analyze effectiveness of communications.

Using ECA to assure frontline and remote workers that they have the most relevant and timely information in response to COVID-19, especially as it relates to worker wellness and safety.

Expect to be able to integrate the ECA tool with other technologies staff use everyday such as cloud office, workstream collaboration, content collaboration, meeting solutions and packaged business applications.

Value real-time visibility into execution with status, dashboards and notifications as well as multiple ways to view campaign and interaction data depending on role or interest.

Exploring how ECA tools can be leveraged for operational communications and chat-based collaboration in frontline worker scenarios.

Looking for more concrete evidence of business impact to warrant higher spend and more strategic positioning of ECA solutions to advance business strategies.

On the supply side, vendors interacting with application leaders are:

Still merging within the market itself, or expanding into the market from other adjacencies, indicating a market that is still in an early stage with many areas open to innovation.

Striving to differentiate in a market where the most popular use cases for internal communications are perceived to not require advanced capabilities by everyday decision makers (especially those in IT).
- Recognizing that dual solutions (frontline versus traditional office workers), is an unsustainable situation over time.

- Exploring how ECA tools can be leveraged for operational communications and chat-based collaboration in frontline worker scenarios.

- Leveraging the need for crisis and urgent communication capabilities in response to COVID-19 to make ECA investments a core part of business continuity.

- Trying to attract more strategic-thinking buyers by framing the value of ECA solutions to be about employee understanding and behavior change brought about by digital transformation.

- Realizing that the communications data captured related to employee engagement and experience is a vital source of people analytics that can be combined with other data to deliver valuable business and cultural insight.

Figure 1 showcases some high-level findings. For more details on the survey, as well as the vendors, refer to the Representative Vendors and Evidence sections.

![Figure 1. Highlights of the Employee Communications Applications Market](image-url)

### Highlights of the Employee Communications Applications Market

**Functionality**

Most products support multichannel communications, management of communications content and general security requirements expected in this market. Better campaign support, functional capabilities and integration are all under improvement. Operational communications is the weakest area but a high priority.

**Deployment Options**

Multitenant cloud environments are dominant. ECA vendors leverage third-party providers (49%) but some have their own platforms (37%).

**Regional Usage**

- 53% of deployments are in North America.
- 32% of deployments are in Europe.

**Operational Timeline**

Typically it takes a few days (39%) to a few weeks (28%) before organizations operationalize solutions. The technology itself is often ready to deploy in a few days (89%).

**Pricing**

Pricing models are mixed, with vendors offering different options for employee segment (frontline vs. office), usage profile (casual, guests), organization types (non-profits) and other criteria.

**Most Common Deployment Size**

More than 68% of deployments are for more than 500 users.
Market Analysis

In the following sections, we look at several key characteristics and trends in the employee communications applications market. The comments, charts and tables are based on self-reported survey data provided by representative vendors in this market. The context and categories for each table were selected by Gartner and are not meant to be an exhaustive exploration of vendor capabilities. Application leaders are encouraged to assess vendors further, based on their own needs.

Real Differences Are in Integration, Campaign Capabilities and Operational Communications

Products in this market generally support functionality in several feature categories. Figure 2 shows a summary of the features offered by products in this market. It suggests that the most developed and mature functionality that is available in most products in this market relates to collaboration, tasks and projects, and content/information sharing. The most active area of development and differentiation between products is around workflow, automation, analytics and reporting. Although most vendors support basic functional capabilities, there is more emphasis on chat and building out operational communication capabilities longer-term.

Legend for Figure 2:

- **Feature categories and subcategories** — The boxes in gray represent the main feature categories. The boxes in white and in different shades of blue represent subcategories for each main feature. For more details on specific functionality that relates to each subcategory, please see Note 2.

- **Common and differentiating features** — The size of the boxes represents the number of products in our survey that support each feature category. Larger boxes represent common features while smaller boxes represent differentiating features.

- **Features in development** — The blue shading in each box represents the number of vendors that have that feature on their roadmap. Darker blue boxes represent features of more intensive product development. White boxes represent features that no vendor is reporting further plans to develop.
Application leaders should use the analysis in Figure 2 to identify the areas in which there are functional differences between available products. Depending on their requirements and priorities, they should delve more deeply into how each vendor supports specific feature categories.

**Strong Presence in North America and Western Europe With Asia/Pacific Presence Rising**

There are far more deployments in North America and Western Europe than in other regions. This may reflect the fact that the solutions are not as well known in other global regions, or that organizations have not realized the value of this type of technology and are relying on other methods to communicate with staff. It may also be influenced by cultural and regional preferences but this hypothesis is not backed by evidence in this set of data. Geographic presence should be a consideration for organizations with a presence in those regional areas, smaller vendors tend to focus only on specific regions. Figure 3 summarizes the regional presence of the vendors in the survey.
Cloud Deployments Are the Only Viable Option

The dominant form of deployment is where multiple tenants are hosted by the third-party provider or by the vendor (see Figure 4). This large proportion of cloud-hosted deployments reflects modern-day emerging market trends where vendors take full advantage of cloud infrastructure options. The deployment options offered by different vendors are still a consideration for many organizations.

Figure 4. Percentage of Deployments for Each Deployment Option
Adoption Is Expected Across a Large Number of Users

All of the vendors in this Market Guide have achieved some level of market presence. Since organizations often want to communicate to large segments of their workforce, deployments are often at a larger scale. This trend implies that decisions are more enterprise wide by nature or targeted to all employees in a certain workforce segment such as frontline workers. Other things being equal, new buyers should look for products and vendors with experience in deployment sizes that match their requirements (see Figure 5).

Figure 5. Percentage of Deployments for Different Deployment Sizes
A Market Where Deployments Span Multiple Industry Sectors

All of the vendors in this Market Guide have also gained traction across multiple industry sectors to varying degrees. This trend suggests that core business value and technical functionality is generally not restricted by requirement constraints in vertical markets. Organizations associated with healthcare, manufacturing, banking, finance and securities appear to make greater use of ECA solutions than other sectors. Retail, business and professional services, leisure, entertainment and hospitality also appear to value these technologies as well. Other things being equal, new buyers can infer that the ECA vendors are not focusing deeply on vertical requirements, if they have such needs for their industry (see Figure 6).

Figure 6. Deployments Span Multiple Industry Sectors
Representative Vendors

Market Introduction

We consider the vendors listed below to be representative of this market because their products are marketed and sold specifically as employee communications applications. The listed vendors have achieved some degree of visibility and traction in this market. We summarize the data provided by the vendors in Table 1 below and in the vendor profiles that follow. The data has been provided by the vendors and is presented as is.

This section provides a list of 17 employee communications applications vendors

Table 1: Representative Vendors in Employee Communications Applications Market
<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product name</th>
<th>FTEs (Total)</th>
<th>FTEs (This Market)</th>
<th>Revenue* in Last Financial Year (Total)</th>
<th>Revenue* in Last Financial Year (This Market)</th>
<th>Revenue* From Software Licenses (This Market, %)</th>
<th>Revenue* From Mobile</th>
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<tbody>
<tr>
<td>Akumina</td>
<td>Akumina Employee Experience Software Platform</td>
<td>90</td>
<td>90</td>
<td>12.5</td>
<td>12.5</td>
<td>78%</td>
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<td>APPrise Mobile</td>
<td>theEMPLOYEEapp</td>
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<td>5</td>
<td>95%</td>
<td>5</td>
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<td>Beekeeper</td>
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<td>200</td>
<td>Not Provided</td>
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<td>9%</td>
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<tr>
<td>Coolfire</td>
<td>Coolfire Core</td>
<td>52</td>
<td>52</td>
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</tr>
<tr>
<td>Dynamic Signal</td>
<td>Dynamic Signal Platform</td>
<td>200</td>
<td>200</td>
<td>Not Provided</td>
<td>Not Provided</td>
<td>95%</td>
<td>5</td>
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<tr>
<td>Facebook</td>
<td>Workplace from Facebook</td>
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<td>70,697</td>
<td>Not Provided</td>
<td>Not Provided</td>
<td>Not Provided</td>
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<td>GuideSpark Communicate Cloud</td>
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<td>Not Provided</td>
<td>Not Provided</td>
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<tr>
<td>Vendor</td>
<td>Product</td>
<td>Revenue (M USD)</td>
<td>Market Share</td>
<td>Sales Growth</td>
<td>Satisfaction</td>
<td>Engagement</td>
<td>Support</td>
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<tr>
<td>Microsoft</td>
<td>Microsoft 365 E3 including SharePoint, Yammer, and Teams</td>
<td>1,511,163</td>
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<td>1,258,000</td>
<td>Not Provided</td>
<td>Not Provided</td>
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<tr>
<td>Poppulo</td>
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<td>270</td>
<td>29</td>
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<td>6%</td>
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<td>ServiceMax</td>
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<tr>
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<td>Smarp</td>
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<td>5%</td>
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<td>80%</td>
<td>20%</td>
</tr>
<tr>
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<td>SocialChorus FirstUp Platform</td>
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<td>13%</td>
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<td>200</td>
<td>18</td>
<td>18</td>
<td>100%</td>
<td>No FTE Prc</td>
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<tr>
<td>Unily</td>
<td>Unily</td>
<td>190</td>
<td>190</td>
<td>26.4</td>
<td>26.4</td>
<td>88%</td>
<td>12%</td>
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<tr>
<td>WorkJam</td>
<td>WorkJam Messaging &amp; Communication</td>
<td>221</td>
<td>160</td>
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<td>Not Provided</td>
<td>90%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Footnote: All revenue shown in millions of U.S. dollars
FTE = full-time equivalent (employees)

Source: Gartner (based on vendor supplied data collected in May 2020)

*The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.*

**Vendor Profiles**

The profiles that follow offer more detailed information about our included vendors.
Akumina

Web address: www.akumina.com

Headquarters: Nashua, New Hampshire, U.S.

Founded: 2015

Private/public: Private company

Product name: Akumina Employee Experience Platform

Package Options: Part of a suite

Notable customers: GlaxoSmithKline (GSK), Vodafone, Banner Health, ING

Customer case studies: www.akumina.com/customers/success-stories

Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client's business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, hosting services in third-party data-centers, region-specific data-center hosting services.

Pricing guidance: Licensing is based on employee buckets e.g., 10-20k employees. There are 12 total buckets. It is a subscription service and is cloud deployed. Pricing runs 51k and goes to 350k per year.

Typical use cases:

- Persona based content delivery in any language
- Mobile content creation, management and delivery
- Intelligent activity stream content syndication
- Employee onboarding communication
- Employee socialization on process and content

APPrise Mobile

Web address: www.theemployeeapp.com

Headquarters: New York, NY, U.S.

Founded: 2014

Private/public: Private company
Product name: theEMPLOYEEapp

Package Options: Stand-alone product

Notable customers: CommonSpirit Health, NFI, Joyson Safety Systems, Caesars Entertainment, Denso, Nissan and Chipotle

Customer case studies: www.theemployeeapp.com/case-studies

Services offered: Strategy consulting, proof of concept, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client's business, working hours support in at least two geographic regions, hosting services in vendor-managed data centers, region-specific data-center hosting services.

Pricing guidance: Volume based pricing.

Typical use cases:
- Top-down communications to deskless workers
- Leadership communication to all employees
- Single-access point for all work-related info
- Broadcast system for alerts and notifications
- Access to HR info for payroll & employee benefits

Beekeeper

Web address: www.beekeeper.io

Headquarters: Zurich, Switzerland

Founded: 2012

Private/public: Private company

Product name: Beekeeper

Package Options: Stand-alone product

Notable customers: ABB, Heathrow, Chalhoub Group (largest retailer in the Middle East), Domino’s Pizza, German Red Cross, Seaboard Foods, Hudson and Life Time

Customer case studies: www.beekeeper.io/en/resource-library
Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client's business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, hosting services in third-party data-centers, region-specific data-center hosting services.

Pricing guidance: Plans range between $1-$5 per employee per month depending on set of features and volume of users. The minimum purchase is 100 users and the plans can be enhanced with additional admin users, Beekeeper’s operational suite, add-ons from Beekeeper’s Marketplace and professional services.

Typical use cases:

- General employee communications, communication of regulations, health and safety guidelines
- Access to information spread in different HR systems
- Digitize paper forms and checklists
- Change management
- Onboarding new staff

Coolfire

Web address: www.coolfiresolutions.com

Headquarters: St. Louis, Missouri, U.S.

Founded: 2010

Private/public: Private company

Product name: Coolfire Core

Package Options: Part of a suite

Notable customers: Enterprise Rent-A-Car, Department of Homeland Security

Customer case studies: www.coolfiresolutions.com/enterprise-case-study

Services offered: Proof of concept, implementation services, on-site training services, remote training services, services through partners, working hours support in at least two geographic regions

Pricing guidance: $25 per user list price includes a base number of sessions. Volume pricing on users and sessions is available at the enterprise tier.
Typical use cases:

- Collaborative logistics — Org and ops collab
- Field service collaboration (FSM)
- Communications — Aircraft turn process — collaborative ops
- COVID-19 health verification and response
- Smart city — first responder and citizen outreach/communications

Dynamic Signal

Web address: www.dynamicsignal.com

Headquarters: San Bruno, California, U.S.

Founded: 2010

Private/public: Private company

Product name: Dynamic Signal Platform

Package Options: Stand-alone product

Notable customers: Bosch, Capital One, Deloitte, Nestlé, Oracle, Pfizer, Samsung, Sutter Health, Toyota, UPS, Verizon

Customer case studies: https://resources.dynamicsignal.com/case-studies

Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client's business, services through partners, working hours support in at least two geographic regions, hosting services in vendor-managed data centers, Custom line of business (LOB) application development is also offered via DySiL, Dynamic Signal's native information platform as a service (iPaaS) solution, which can then be presented through its mobile applications.

Pricing guidance: Product offered as a named user subscription on an annual, renewable license, indexed to user accounts (increasingly the entire employee base). Discounts offered for multiple year terms.

Typical use cases:

- Organizational and executive communications
- Employee advocacy and social selling
Facebook (Workplace)

Web address: www.workplace.com

Headquarters: Menlo Park, California, U.S.

Founded: 2004

Private/public: Public company

Product name: Workplace from Facebook

Package Options: Stand-alone product


Customer case studies: www.workplace.com/case-studies

Services offered: Strategy consulting, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client’s business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, hosting services in vendor-managed data centers

Pricing guidance: Pricing is per user per month.

- Essential — free
- Advanced — $4 per person per month
- Enterprise — $8 per person per month
- Frontline staff pricing — $1.50 per frontline user per month (this is discounted pricing for frontline workers, not an add-on to the base price)
- Workplace Advanced is also available free of charge to eligible charitable organizations through its “Workplace for Good” program
- Custom-made discounts are available for large enterprises
Typical use cases:
- Organizationwide communication
- Team communication and collaboration
- Building a work community
- Knowledge library (light version of an intranet)

GuideSpark

Web address: [www.guidespark.com](http://www.guidespark.com)

Headquarters: Redwood City, California, U.S.

Founded: 2008

Private/public: Private company

Product name: GuideSpark Communicate Cloud

Package Options: Stand-alone product.

Notable customers: Ford, Nebraska Medicine, Corning, Essilor, Oportun, M&T Bank

Customer case studies: [www.guidespark.com/customers](http://www.guidespark.com/customers)

Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, services through partners, hosting services in third-party data-centers, communication strategy and media production

Pricing guidance: Platform pricing is a subscription fee based on organization size. Journey capacity based on the number of “journeys” licensed to run on the platform.

Typical use cases:
- Change communications for strategic talent initiatives
- Change communications for digital transformation
- Change communications for core HR programs
- Change communications to drive program adoption
- Change communications for merger and acquisition (M&A) integration
Igloo Software

Web address: www.igloosoftware.com

Headquarters: Kitchener, Ontario, Canada

Founded: 2008

Private/public: Private company

Product name: Igloo Software

Package Options: Stand-alone product

Notable customers: Caesars Entertainment, Leidos, Gildan, RH, Mass General Brigham (formerly Partners HealthCare)

Customer case studies: www.igloosoftware.com/customers

Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client’s business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, region-specific data-center hosting services.

Pricing guidance: Igloo has two pricing models. Intranet platform customers are per user per month (average $3) and our single or bundle solution customers are annual flat fee starting at $7,200 for up to 5,000 users.

Typical use cases:

- Corporate news (in the know, all the time)
- Collaborate (connect people, process and information)
- Knowledge management (single source of truth)
- Strengthen culture & engagement (put people first)
- Crisis communications

LumApps

Web address: www.lumapps.com

Headquarters: 23 Rue Louis le Grand, Paris, France

Founded: 2015
Private/public: Private company

Product name: LumApps

Package Options: Stand-alone


Customer case studies: www.lumapps.com/customer-stories

Services offered: Strategy consulting, proof of concept, Implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client's business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, hosting services in third-party data-centers, region-specific data-center hosting services, organizational change management, business readiness, change communications.

Pricing guidance: Price per user/employee — subscription.

Typical use cases:

- Company news — News center (top down/personalized)
- Department news and communities (public and private)
- Executive news (executive corner/town halls/leader community)
- HR portal — News, information, benefits and more
- Communities of (practice/interest/projects)

Microsoft

Web address: www.microsoft.com

Headquarters: Redmond, Washington, U.S.

Founded: 1975

Private/public: Public company

Product name: Microsoft 365 E3 including SharePoint, Yammer and Teams

Package Options: Part of a suite

Notable customers: Rabobank, Fannie Mae, Korn Ferry
Customer case studies:  customers.microsoft.com/en-us/home

Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client's business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, region-specific data-center hosting services.

Pricing guidance: Microsoft 365 is a cloud service licensed on a per user subscription basis. Microsoft 365 E3 licenses cost $32 per/user per month. Discounts are available through various Microsoft customer and partner programs.

Typical use cases:

- Employee engagement/town halls
- Employee communications/company news/crisis communications
- Team collaboration
- HR information/new employee onboarding
- Intranet sites and portals (for example, strategy comms)

Poppulo

Web address:  www.poppulo.com

Headquarters: Cork, Ireland

Founded: 2002

Private/public: Private company

Product name: Poppulo

Package Options: Stand-alone product

Notable customers: ASOS, Balfour Beatty, Cargill, CDK Global, Equifax, Johnson Controls, GSK, Magna, Nestlé, Rolls-Royce, Telefónica

Customer case studies:  www.poppulo.com/customers

Services offered: Strategy consulting, proof of concept, branding and design consultation, Implementation services, on-site training services, custom-made training courses. Remote training services, custom strategic consulting that relates to the client's business, services through partners,
24/7 support globally, regional specific data center hosting services. Working hours support in at least two geographic regions.

**Pricing guidance:** SaaS licensing model based on number of employees and named admins

**Typical use cases:**
- Engage all workers (desk/deskless), multichannel
- Executive leadership, employee alignment
- Operational/functional comms (sales, IT, HR, etc.)
- Change management/crisis communications
- Company news

**ServiceMax**

**Web address:** [www.servicemax.com](http://www.servicemax.com)

**Headquarters:** Pleasanton, California, U.S.

**Founded:** 2007

**Private/public:** Private company

**Product name:** ServiceMax Zinc

**Package Options:** Part of a suite

**Notable customers:** DISH Network, BioTek Instruments, Alcon, Exelon

**Customer case studies:** [www.servicemax.com/customers/customer-stories](http://www.servicemax.com/customers/customer-stories)

Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client's business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, ROI/business case development with our global customer transformation team.

**Pricing guidance:** Pricing is per user per month subscription pricing. $20 per/user per/month is list.

**Typical use cases:**
- Real-time collaboration for field service techs
- Hotline support for internal and third-party techs
- Corporate communications using broadcast features
- Internal collaboration across various departments

Smarp

Web address: [www.smarp.com](http://www.smarp.com)

Headquarters: Helsinki, Finland

Founded: 2011

Private/public: Private company

Product name: Smarp

Package Options: Part of a suite

Notable customers: Amazon Europe, Swarovski, London Stock Exchange, L’Oréal, AMA, DHL, LG, Marriott

Customer case studies:


Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client’s business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, hosting services in third-party data-centers, region-specific data-center hosting services.

Pricing guidance: Pricing based on platform fee, required additional features and additional user seats. Platform fee including 1000 seats starting at $72,000 annually. Contract length generally 24 to 36 months.

Typical use cases:

- Reach every employee with targeted communications
- Leadership communications
- Crisis communications
- Divisional and managerial communications
- M&As

**Sociabble**

**Web address:**  [www.sociabble.com](http://www.sociabble.com)

**Headquarters:** Paris, France

**Founded:** 2014

**Private/public:** Private company

**Product name:** Sociabble

**Package Options:** Stand-alone product

**Notable customers:** L’OCCITANE Group, VINCI Energies, Infosys, Orange Business Services, Criteo, Coca-Cola European Partners, Generali

**Customer case studies:**  [www.sociabble.com/case-studies](http://www.sociabble.com/case-studies)

**Services offered:** Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client’s business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, hosting services in third-party data-centers, IT consulting, content development consulting and training, ready-to-use content library, knowledge base and FAQ “self-service,” access to a client community of more than 2,000 project managers.

**Pricing guidance:** Sociabble works in “Packs Levels.” Packs are based on a number of licenses and include add-on features, consulting days. The pricing is confidential and can’t be communicated to any third party.

**Typical use cases:**

- Company news, line of business news, executive leadership views
- Bottom-up comm and frontline workers
- Large international organization communication
- Employee alignment and engagement
- Employee advocacy
SocialChorus

Web address: www.socialchorus.com

Headquarters: San Francisco, California, U.S.

Founded: 2008

Private/public: Private company

Product name: SocialChorus FirstUp Platform

Package Options: Part of a suite

Notable customers: AT&T, Amazon, 7-Eleven, AB InBev, Hilton, Providence Health, Ford, Dow, Boeing, GSK, ADM, Abbott

Customer case studies: www.socialchorus.com/customer-stories

Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client's business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, hosting services in third-party data-centers, region-specific data-center hosting services

Pricing guidance: Based on an annual platform and user subscription fees along with a charge for one time tech implementation, education and strategic services. There is also additional cost for specific integrations.

Typical use cases:

- Company News
- Leadership and strategic communications
- Operational and team communications
- Modern intranet
- Workforce analytics and intelligence

Staffbase

Web address: www.staffbase.com

Headquarters: Chemnitz, Germany

Founded: 2014
Private/public: Private company

Product name: Staffbase Employee App

Package Options: Part of a suite

Notable customers: BMW, Rio Tinto, DHL, adidas, UC Health

Customer case studies: staffbase.com/en/customers

Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, Services through partners, working hours support in at least two geographic regions, hosting services in third-party data-centers, region-specific data-center hosting services.

Pricing guidance: Named user subscriptions, price includes support for onboarding and ongoing consulting and customer support including quarterly reviews, discounts for charity. Pricing starts at 1,000 users and $25000/year.

Typical use cases:
- Corporate and audience specific communications
- Operational communications (front line, field service)
- Employee training, policy updates and onboarding
- Integration of employee self-services and tools
- Measure engagement with employee surveys

Unily

Web address: www.unily.com

Headquarters: Eashing, Surrey, U.K.

Founded: 2005

Private/public: Private company

Product name: Unily

Package Options: Part of a suite

Notable customers: British Airways, Shell, L'Oréal, Estée Lauder, Baker Hughes, Cardinal Health

Customer case studies: www.unily.com/insights/case-studies
Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client’s business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, hosting services in vendor-managed data centers, region-specific data-center hosting services, premium Support and consulting packages, development support for customization, dedicated hardware, custom-made mobile app deployed through master data management (MDM).

Pricing guidance: User based pricing. Pricing for the Unily Employee Experience Platform starts from $4,995 per month for a minimum 500 users, and scales based on the number of active users you have.

Typical use cases:
- Internal communications solution
- Culture and engagement solution
- Frontline workers solution
- Knowledge management solution
- Productivity and collaboration solution

WorkJam
Web address: www.workjam.com

Headquarters: Montreal, Canada

Founded: 2014

Private/public: Private company

Product name: WorkJam Messages and Internal Communication

Package Options: Part of a suite

Notable customers: Shell, Kroger, Avis Budget Group, Woolworths, Ulta Beauty, KwikTrip, DaVita

Customer case studies: www.workjam.com/case-studies

Services offered: Strategy consulting, proof of concept, implementation services, on-site training services, remote training services, migration services including migrations from competitor products, custom strategic consulting that relates to the client’s business, services through partners, working hours support in at least two geographic regions, 24/7 support globally, region-specific data-center hosting services, white-Labeling
Pricing guidance: SaaS, with per employee/user per month pricing with optional volume cap (prices below are per user per year)

Typical use cases:

- Internal multiway communication platform
- Streamline task execution at employee level
- Improve training, upskilling and onboarding
- Labor and time-saving schedule management
- Make operations more effective and efficient

Market Recommendations

Application leaders responsible for employee communications should:

- Establish specific use cases for ECA tools, identifying audience segments, channels, media and content types, campaign objectives and analytics by collaborating with stakeholders, especially with those responsible for COVID-19 outreach.
- Address inevitable governance questions by determining access rights to work management capabilities in order to ensure consistency, quality and reuse.
- Start with deployments where working transparently and collaboratively is already the norm to minimize the challenges from culture, behavior and skills requirements to ensure success.
- Test product and vendor readiness by starting with small, targeted deployments making sure that use-case specific issues and vendor readiness are addressed.
- Select a vendor from a shortlist by assessing them against more subjective qualities, such as usability and user experience, through a quick but realistic proof of concept.
- Improve your technology investment success by contrasting organizational and operational communication needs, as they may point to different ECA technology solutions.
- Exploit a range of implementation services — from strategy and proof of concept to deployment and support — offered by many vendors in the ECA market. Add these requirements to your RFP/RFI.
- Connect strategies and approaches for ECA solutions with adjoining strategy and technology areas such as digital workplace initiatives, digital dexterity, modern intranets and emergency mass notification services.
Some documents may not be available as part of your current Gartner subscription.

A Strategic Framework for Communicating With Frontline Workers in Times of Anxiety

Eight Steps for Modernizing Employee Communications in the Digital Workplace

Traditional Intranets Are Dead — Modern Intranets Are Alive and Well: Part 1

Traditional Intranets Are Dead — Modern Intranets Are Alive and Well: Part 2

Evidence

In July 2020, Gartner conducted a survey among representative vendors in this market that are profiled in this market guide. Unless otherwise stated, the charts and tables in this report are based on the self-reported survey data provided by these vendors. As required by Gartner's research methodology, vendors received a copy of the information for factual review prior to publication.

Note 1: Representative Vendor Selection

The vendors included in this Market Guide were selected to represent those with products that support most of the high-level capabilities mentioned in the Market Definition section, as well as most of the detailed functionality described in Note 2. In addition, their products are marketed and sold specifically as stand-alone employee communication applications (ECA), or as ECA modules in larger suites; and they are bought and used for this purpose. Finally, the listed vendors have achieved some degree of visibility and traction in this market.

Note 2: Product Feature Categories

The following feature categories and capabilities within those categories established the foundation for vendor survey responses in the market guide survey.

<table>
<thead>
<tr>
<th>Feature Category</th>
<th>Capabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications delivery</td>
<td>Multichannel (Communications across channels including mobile app, webpages, micro-site, email, digital signage, SMS, RSS feeds and IoT geofencing, or other sensor triggering)</td>
</tr>
<tr>
<td>Communications delivery</td>
<td>External application (Communications sent into third-party systems via widgets, API integration, or other methods [plug-in, tab, iFrame] and other communication systems such as emergency/mass notification)</td>
</tr>
<tr>
<td>Feature Category</td>
<td>Capabilities</td>
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<tr>
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</tr>
<tr>
<td>Communications delivery</td>
<td>Alerts and notifications (Alert, notifications and reminders sent to employees based on new messages, updates, status changes, events, upcoming news, tasks or work activities in other systems. Alerts triggered by thresholds and events in other systems)</td>
</tr>
<tr>
<td>Functional capabilities</td>
<td>Core (Employees interact through a mobile/desktop app or browser that supports activity feeds, segments communications by channels or folders. Communications can be prioritized, highlighted and require employees to take action before being dismissed. Employees are identified by profiles and have access to an organizational directory with options to follow different types, categories and sources of communications. Employees can socially recognize others for good work. Employees can search to locate relevant people and information. A digital personal assistant is available)</td>
</tr>
<tr>
<td>Functional capabilities</td>
<td>Communications (Broadcast communications is supported across all employees in the system in addition to communications directed to groups or individuals based on predefined or ad hoc criteria. Communications support read receipts or similar forms of tracking to gauge interaction. Surveys and polls can also be used to gather employee feedback. Communications to staff can include contextualized recommendations and suggestions based on analytics and profiling. Moderation of feedback [comments] can be turned on as needed)</td>
</tr>
<tr>
<td>Functional capabilities</td>
<td>Chat (Employee can chat with on a peer to peer basis as well as participate in a group chat or interact with a chatbot, bot or similar conversational device. Chat can be moderated. Chat messages can be routed to others based on roles, skills, and other work related criteria)</td>
</tr>
<tr>
<td>Functional capabilities</td>
<td>Administration (System can be centrally led, managed and configured through the delegation of roles. Moderation functions include managing chat features and submission of content by employees. Access controls based on security and identity systems with group and user specific privilege levels supported as well as customization of application functionality. Administration includes basic usage and activity reports)</td>
</tr>
<tr>
<td>Feature Category</td>
<td>Capabilities</td>
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<tr>
<td>Communication content management</td>
<td>Content and media support (Formats and media types, support for various media formats [HTML, PDF, video, native files, live streaming, embedded videos, forms, micro-sites], with multilanguage and native tool authoring with basic content management out of the box — or — import and export support to other content management systems. Content submission of stories, content, and ideas from employees, approved roles, or outside agencies. Task management and workflow for content development, with predefined or custom templates, tagging, content access levels to limit sharing)</td>
</tr>
<tr>
<td>Campaign support</td>
<td>Campaign execution (Deliver communications to one or more channels based on schedules, events, thresholds or other criteria. Communications sent to specific groups based on predefined or ad hoc attributes including behavioral data. Communications can be prioritized, made persistently viewable until action is taken. Reminders and other forms of alerts supported to highlight communications. Support to avoid triggering anti-spam filters and enable opt-out option on communications as required)</td>
</tr>
<tr>
<td>Campaign support</td>
<td>Campaign management (Campaign creation capabilities with dashboard reporting that includes campaign status, progress, interaction data, and ability to update schedule or make revisions to future execution)</td>
</tr>
<tr>
<td>Campaign support</td>
<td>Campaign analytics (Historical, current, and predictive analytics. Single vs. multichannel [deep dive, compare/contrast], trending and reach, drill-down into audience segments, interaction levels, feedback, content types, and engagement email value assessment. Import and export to other BI systems)</td>
</tr>
<tr>
<td>Campaign support</td>
<td>Campaign segmentation (Employee identification other than email with audience segmentation based on pre-existing or custom criteria to align communications with certain workforce segments. Policy and process-based communications distribution based on auto-generation criteria [rules, events, thresholds] enabling automation of communications for operational needs)</td>
</tr>
<tr>
<td>Employee experience</td>
<td>Basic (Employee can customize application or web experience, tag, bookmark, favorite, follow and create personal collections of content, submit content ideas, give feedback [like, share, comment] as well as opt-out of certain communications. Employee can opt-out of certain communications)</td>
</tr>
<tr>
<td>Employee experience</td>
<td>External (Employee can access work-related systems including HR, shift management, LOB applications, and receive alerts and reminders related to work activities)</td>
</tr>
<tr>
<td>Feature Category</td>
<td>Capabilities</td>
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</tr>
<tr>
<td>Employee experience</td>
<td>Internationalization (Can handle at least 10 languages including Asian languages)</td>
</tr>
<tr>
<td>Employee experience</td>
<td>Accessibility (WCAG 2.0, Americans with Disabilities Act [ADA], Section 508, support for screen readers, voice transcription and other accessibility devices)</td>
</tr>
<tr>
<td>Operational communications</td>
<td>Chat-based workflows (Message-based workflow engine that integrates with other systems with routing and communications based on work changes, thresholds, triggers, events or other criteria. Visual toolkit for creating or modifying workflows by business users without special technical training, Hands-free support such as record/send/receive audio and/or video messages, push-to-talk, or other types of hands-free capabilities)</td>
</tr>
<tr>
<td>Operational communications</td>
<td>Online forms (forms for structured input that can trigger messaging notifications, or workflow processes; forms builder for common form designs with branching, logic, custom fields, data validation and multiple form controls such as dropdowns, radio buttons, multiselect options, etc.; can upload attachments)</td>
</tr>
<tr>
<td>Operational communications</td>
<td>Messaged/chat (Messaging and chat based interface to shift scheduling, punch in/out. swapping, and related task activities related to being on and off shift including being able to pick shifts, be informed of open shifts, and rules for shift trading as well as managerial or policy-based oversight [seniority rules] and approval of shift alternations. Shifts notes capability from management to employee, employee to management, and employee to employee [job sharing, hand-offs])</td>
</tr>
<tr>
<td>Operational communications</td>
<td>Notifications and reminders (Notification and reminders by role, by subscription, or by custom rules for events or deadlines; push and pull notifications; notifications of changes based on operational info)</td>
</tr>
<tr>
<td>Operational communications</td>
<td>Chat bots and bots (Chat bot and bot builder and development framework with low-code/no-code interface as well as full programming controls for technical developers; programmability via APIs and third-party application development tools)</td>
</tr>
<tr>
<td>Operational communications</td>
<td>Robotic process communications (can integrate, accept, and relay communications [events, alerts, exception handling messages] from RPA systems)</td>
</tr>
<tr>
<td>Feature Category</td>
<td>Capabilities</td>
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</tr>
<tr>
<td>Integration</td>
<td>Microsoft Office 365 integration (pre-integration with single sign-on, dedicated apps in the cloud office app store, can send notifications, embed content, embed dynamic dashboards, embed forms, can search for content in both the cloud office suite and your system with security trimming, create common groups and teams in both systems, redirect chat and conversations to cloud office, inject and request metadata to and from cloud office system, create/edit/store all documents in cloud office repositories)</td>
</tr>
<tr>
<td>Integration</td>
<td>Google G Suite integration (pre-integration with single sign-on, dedicated apps in the cloud office app store, can send notifications, embed content, embed dynamic dashboards, embed forms, can search for content in both the cloud office suite and your system with security trimming, create common groups and teams in both systems, redirect chat and conversations to cloud office, inject and request metadata to and from cloud office system, create/edit/store all documents in cloud office repositories)</td>
</tr>
<tr>
<td>Integration</td>
<td>Workplace by Facebook (pre-integration with news feed, groups [including special group types for projects, etc.], campaigns, bot framework, Workplace chat app, knowledge library, workplace rooms and live streaming)</td>
</tr>
<tr>
<td>Integration</td>
<td>Third-party system integration (integration into non-productivity systems including BI, CRM, ERP, HCM, SCM, financial or accounting systems, supporting the ability to send and receive notifications or request and inject data with security trimming; integration with any third-party application on request)</td>
</tr>
<tr>
<td>Integration</td>
<td>Platform extensibility (programmatic API access to content and data for technical professionals including REST APIs; offers app-store for third parties to publish apps that integrate with your system; have published apps that provide access to your system in third party app stores; bulk import/export of system data in a structured format including spreadsheets or CSV files)</td>
</tr>
<tr>
<td>Security and compliance</td>
<td>Security (Single-sign on based on active directory including SAML and Azure AD; integration with third-party SSO providers such as Okta; multifactor authentication; data-at-rest encryption; data-in-flight encryption, client encryption keys; data servers in specific regions for residency needs, DLP, e-discovery, legal hold)</td>
</tr>
</tbody>
</table>
### Feature Category

<table>
<thead>
<tr>
<th>Security and compliance</th>
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</thead>
<tbody>
<tr>
<td>Certification (Accreditation or attestation with the respect to product and infrastructure security or compliance standards such as: SOC 1, SOC 2, SOC 3, ISO 27001, ISO 27017, PCI DSS, HITRUST, HIPAA, FINRA, FERPA, GSA, GDPR, FedRAMP, FISMA Attestation; relevant certificates are available for inspection; support for privacy shield frameworks and country-level Works Counsels)</td>
</tr>
</tbody>
</table>

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**Recommended by the Authors**

- A Strategic Framework for Communicating With Frontline Workers in Times of Anxiety
- Eight Steps for Modernizing Employee Communications in the Digital Workplace
- Traditional Intranets Are Dead — Modern Intranets Are Alive and Well: Part 1
- Traditional Intranets Are Dead — Modern Intranets Are Alive and Well: Part 2

**Recommended For You**

- コンピューティング・インフラストラクチャの戦略的ロードマップ：2020年
- 本稼働環境におけるコンテナ／Kubernetes運用のベスト・プラクティス
- カスタム・ソフトウェア開発サービスの競合状況
- クラウド・コンタクトセンター・プラットフォームでMicrosoft Teamsを最大限に活用するには
- CRMリード管理のマジック・クアドラント

**Supporting Initiatives**

- Digital Workplace Applications
- Digital Workplace Program