

EVENT FLASH

SharePoint 2010: Re-thinking Information Work

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Microsoft SharePoint is a phenomenon that obviously answers an enterprise need for a platform that integrates the major information work tools – search, content management, business intelligence, workflow, and messaging – into a collaborative work framework. Since the release of SharePoint Portal Server in 2002, developers, users, and partners have explored the boundaries of SharePoint, often exceeding them in unexpected ways. To its credit, Microsoft has engaged in an open dialogue with its users, and has responded to their suggestions, creating a new category of application, with composite characteristics unlike those from any competitor.

The sold-out SharePoint 2009 conference, attended by 7400 people, erupted in applause for some of the new features and enhancements announced Monday, October 19, 2009, by Steve Ballmer and Jeff Teper. The major vision, and one that SharePoint 2010 has begun to deliver on, is that separating authoring, search, analytics, collaboration, or publishing makes no sense: these features must be available at every point in an information work process. IDC's own studies over the past 8 years serve to underline the tremendous waste that organizations have tolerated because the tools that were available did not fit their workers' needs. Thus, although there were numerous new products and features announced, by far the major advance that SharePoint 2010 will contribute to the marketplace is to integrate tools and features across a common platform in order to support a broad variety of information work tasks.

- ☒ Authoring capabilities built in at every point so that users can create, edit, and publish blogs, wikis, Web pages, profiles, etc. Support for co-authoring using Microsoft's desktop Office suite and/or its new browser-based Office Web Apps.
- ☒ Collaboration aided by better Outlook integration, ability to rank documents and recommend them, and automatic tracking of recent activities and projects to help people find others working on similar projects.
- ☒ Support for emerging industry standards such as AJAX, XHTML, REST, and LINQ, and browsers like Safari and Firefox in addition to Internet Explorer. Developers, IT professionals, and end users have needed help in extending SharePoint to mixed environments, and Microsoft appears committed to this.
- ☒ Search as an immersive experience: implicit search, people search, objects and projects as well as documents, as answers to a search; automatic metadata extraction; search by phonetic equivalents for names, type ahead suggestions for queries, related searches, and faceted browsing based on metadata.
- ☒ Support for on-premise, cloud, or hybrid environments, with browser functionality to extend processes and applications to partners or suppliers.
- ☒ Support for mobile access and access by multiple devices.
- ☒ Several important enhancements to SharePoint's content management capabilities, including: taxonomy services that support both a top-down and a bottom-up approach and permit meta-data based navigation and query filtering; document sets' records and retention management across all content types (documents, wikis, blogs, Web pages, etc.); improved support for rich media via blob storage for video, and built-in video streaming, and improved multilingual support.
- ☒ Much needed scalability to millions of documents, index partitioning, and parallel searching.
- ☒ Visual Studio integration representing a re-alignment of how application developers are now expected to develop with SharePoint through VS2010 and new developer tools for rapid application development, mashups, and composites.
- ☒ Power Pivot: the ability to manage and sort Excel tables with over 1 million rows (previously code named "Gemini").
- ☒ An improved UI that moves away from folders to allow navigation driven by metadata facets. Search results include a preview pane for flipping through documents, and also the option to find related materials. The new UI also brings the "ribbon" to all SharePoint tasks, and makes it contextual.
- ☒ Better end user tools to move some of the work of customization and personalization to end users. With libraries of templates, more wizards, and help with best practices, end users will be able to design their

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own personal sites, or write back to underlying databases. All editing tools are WYSIWG, with changes published in real time.

Microsoft will release a beta version of SharePoint 2010 publicly in November, with the final version available in the first half of 2010. There were abundant announcements about specific developer, end user, and administration tools for all SharePoint components. Throughout this week's conference, it was clear that Microsoft is committed to helping customers deploy SharePoint effectively with online help and support, and through their network of partners. What is clear from the adoption rate for SharePoint is that it fills a need, or a set of needs, for an integrated, comprehensive, and programmable platform for information work in the enterprise. The sum is greater than its parts, and that is the secret to its popularity.

For Microsoft, SharePoint 2010 presents a bright spot in a challenging environment, precipitated both by the recession and by an IT transformation that has begun to rattle the PC-centric computing environment responsible for Microsoft's financial success in the last quarter century. The shift to Web-centric application development has conspired lately with a consumer shift to smart mobile devices and cloud-based off-premises software-as-a-service operation that is creating difficult disruptive forces for the company. While Microsoft is responding to these challenges on multiple fronts, one of its most effective strategies has been the folding of multiple market categories around search, content, collaboration, business intelligence, and portals into the SharePoint compound product that functions as the operating system or IT platform for enterprise knowledge workers. (For more information, see *Worldwide Collaborative Content Workspace 2009–2013 Forecast and 2008 Vendor Shares: A Case of Coalescing Submarkets*, IDC #219885, Sep 2009).

As another example of SharePoint as "platform," Microsoft last month announced the release to beta this quarter of Microsoft Project 2010 which includes tighter integration with SharePoint as well as Visual Studio Team System (VSTS – Microsoft's application life cycle management solution) and the ability to input data from Excel and Microsoft Exchange Server among a series of other major improvements (see IDC Link). Providing a collaborative social networking environment to better support communication between business, IT, quality personnel, and other project and program resources can set the stage for appropriate allocation and portfolio prioritization in a difficult economy. Effective communication in this context is key, as businesses leveraging SharePoint and its links to Microsoft's ubiquitous Office and other solutions have a common medium to coordinate IT planning and execution.

The success of SharePoint demonstrates that enterprises welcome this consolidation and, despite less than top-of-category features in each individual application, they will adopt a good-enough and regularly improving baseline of functionality across these categories if it offers cost-savings and enablement of initiatives that mix-and-match these previously siloed functions in creative and effective ways. SharePoint 2010 shows that Microsoft will continue down this path to consolidation while continuing to improve the product's scale and development features.

The 2010 release also fills in some of the social computing gaps in SharePoint 2007. This presents an interesting market dynamic for SharePoint-certified partners like Newsgator, and integrators like Atlassian, Jive Software, Leverage Software, Telligent, blueKiwi, and other social software providers who deliberately partnered with SharePoint 2007 as a channel into the enterprise. These companies have built products around the missing pieces of the social layer that SharePoint 2007 lacked. SharePoint 2010 now carries social awareness (presence and profiles) beyond MySites to other components, including Office 2010. It provides a more unified social experience that includes more robust social search, activity feeds, social networking capabilities, social tagging, podcasting, video, and analytics. With these social computing enhancements in SharePoint 2010, Microsoft continues to emphasize that it is providing a platform on which its ISV partners can build: it will provide the plumbing, allowing partners like Newsgator (Social Sites 3.0) to extend the out-of-box capabilities of SharePoint 2010. As noted above, Microsoft has extended its records management to social media so that users can declare social media (e.g., blogs, wikis) within SharePoint 2010 as records, manage their retention, and place legal holds on content if required. This is Microsoft's answer to enterprise concerns around governance and compliance of social media content – an important step toward increasing enterprise acceptance of social software.

SharePoint is evolving to be more flexible and useful as a partner to other Microsoft collaboration products. For example, users can now employ SharePoint as data repository, accepting email messages into SharePoint document libraries, discussion groups, and lists. This will be a popular alternative to Exchange public folders and for firms that want to use SharePoint as a records management system for email. Recent IDC interviews with SharePoint customers underscore that they look to SharePoint to help them change user behavior around locally-stored data sprawl, user file-shares, and using email as a repository for large files. Larger firms that have multiple content repositories frequently struggle to provide good integration across these disparate content silos, which increasingly include SharePoint workspaces. SharePoint 2010 also showcases a redesigned Groove, now called Workspace 2010, as a richer, fully integrated client that supports offline experience, including access and editing capabilities in InfoPath forms and custom composite applications. Finally, this release of SharePoint will improve workflow by providing full read/write access and editing capabilities for editing documents from Outlook 2010, an improvement over the former read-only functionality.

The significance of these announcements goes beyond the set of features Microsoft has announced to a vision of information work that is profoundly different from what we see today. This could liberate organizations that have tied jobs to their IT infrastructures. If we accept the potential for these changes, then we can envision that in the next five years forward-looking organizations will restructure themselves to make the most of these possibilities, freeing top level strategic thinkers to think broadly, while creating a new hierarchy of jobs

that support decision making. IDC believes that this release of SharePoint will help to drive the movement from transaction-based to broad information-based computing. This trend will initiate a new wave of IT investment and a profound re-thinking of how people work in the future. In fact, discussions at the conference served to underline that solving the technology problems will force us to confront bigger questions of privacy, appropriate social media and technology use, better and more streamlined business process design, and organizational structure.