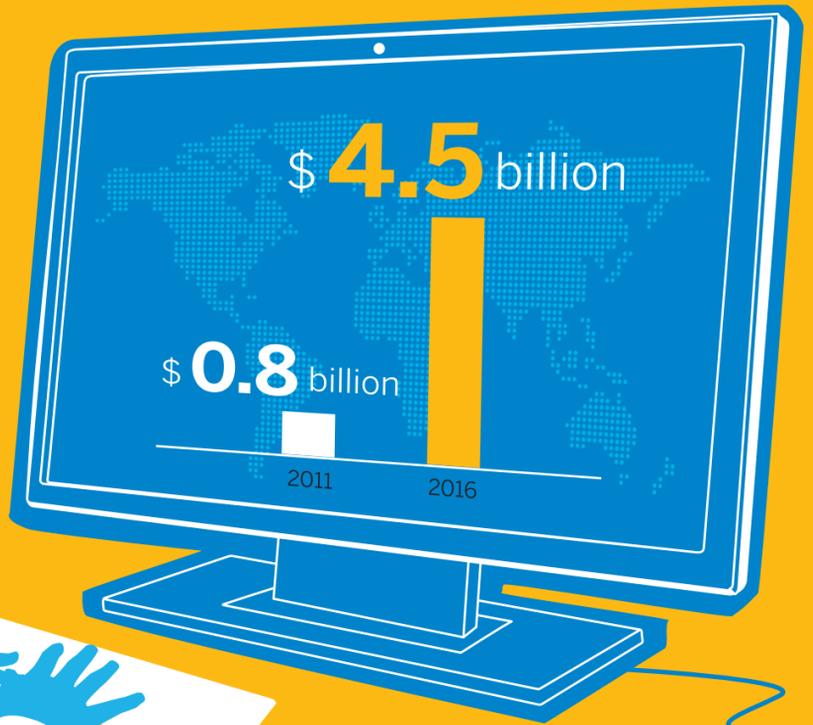
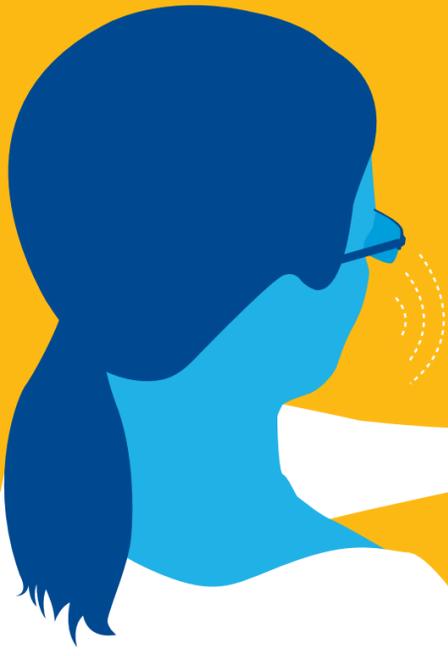


Social Software Drives Results

Social software growth is booming, but there are still challenges to adoption

Huge anticipated growth in enterprise social software market



Social has the greatest impact when used across the entire organization

IDC expects worldwide enterprise social software applications revenue to grow at a CAGR of **42.4%**

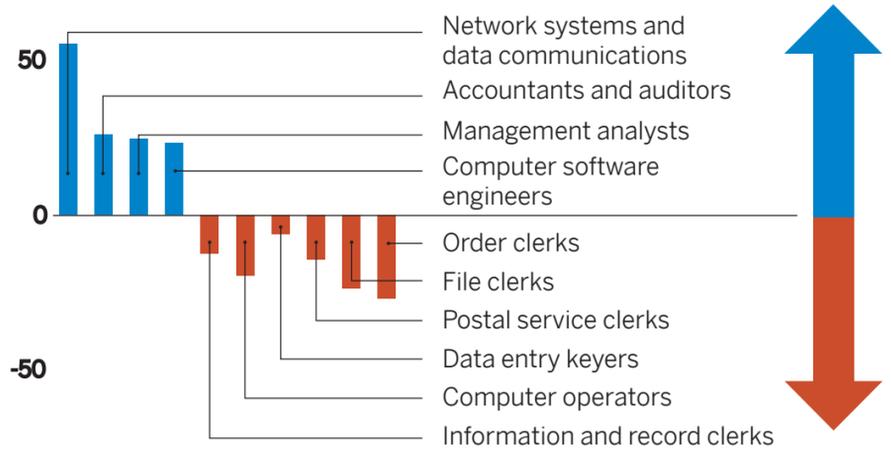
Source: IDC Worldwide Social Software 2012-2016 Forecast

Knowledge jobs are on the rise

Double digit growth estimated in healthcare, accounting, business consulting and IT jobs between 2008-2018



Source: Employment Projections Program, US Department of Labor, US Bureau of Labor Statistics



The cost of inefficiency

Employees spend 30 minutes a day searching for documents



costing businesses **\$ 3,900** per employee each year in productivity losses.

Source: PayScale, The Salary Reporter, 2012

Between 20% and 40% of an employee's salary pays for email administration.

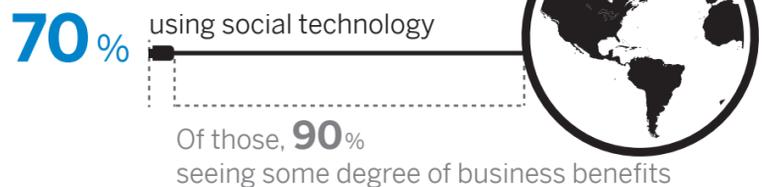


Source: International Journal of Internet and Enterprise Management, 2011

Enterprise social software helps knowledge workers and companies drive results

Using social technology around the globe

Survey of 4,200 companies



Source: McKinsey&Company, The Social Economy

10 ways social technology can add value in organizational functions within and across enterprises

Across Entire Enterprise

Enterprise-wide levers (Social as organizational technology)

- 9 Improve intra- or inter-organizational collaboration and communication
- 10 Match talent to tasks

Organizational Functions

Product development

- 4 Derive customer insights¹
- 1 Co-create products

Operations and distribution

- 2 Leverage social to forecast and monitor
- 3 Distribute businesses processes

Marketing and sales

- 4 Derive customer insights
- 5 Use social technologies for marketing communication/ interaction
- 6 Generate and foster sales leads
- 7 Social commerce

Customer service

- 8 Provide customer care via social technologies
- Business support² Improve collaboration and communication; match talent to tasks³

1. Deriving customer insights for product development is included in customer insights (lever 4) under marketing and sales. 2. Business support functions are corporate or administrative activities such as human resources or finance and accounting. 3. Levers 9 and 10 apply to business support functions as they do across the other functional value areas. Source: McKinsey Global Institute Analysis

However, given the value of enterprise social, people are not adopting at rates you would expect

Source: Source: Forrester Research, Inc., Forrsights Employee Workforce Survey Q4 2011, November 2011



77% of employees who have a social network in their organizations have never used it