

# Online File Sharing and Collaboration: The SMB Market Opportunity

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## Contents

<b>Section 1: Market Definition and Drivers</b> .....	3
<b>Section 2: 2014–2020 U.S. Market Opportunity, Size and Forecast</b> .....	6
<b>Section 3: SMB Current and Future Adoption Trends</b> .....	7
<b>Section 4: SMB Industry Adoption Trends</b> .....	9
<b>Section 5: The Online File Sharing and Collaboration Vendor Landscape</b> .....	10
<b>Section 6: SMB Challenges with OFSC Solutions</b> .....	13
<b>Section 7: Recommendations for OFSC Vendors</b> .....	14
<b>Section 8: Recommendations for SMBs</b> .....	15
<b>Section 9: Summary and SMB Group Perspective</b> .....	16
<b>Section 10: Vendors Included in This Study</b> .....	16
<b>Key Vendor Differentiators</b> .....	17

### *Detailed Vendor Profiles:*

[\*AirWatch Secure Content Locker\*](#)

[\*Box\*](#)

[\*Citrix ShareFile\*](#)

[\*Dropbox\*](#)

[\*Egnyte\*](#)

[\*Google Drive\*](#)

[\*Hightail \(formerly YouSendIt\)\*](#)

[\*IBM Connections\*](#)

[\*Microsoft OneDrive\*](#)

[\*Salesforce Files\*](#)

## *Online File Sharing and Collaboration: The SMB Market Opportunity*

SMB Group recently wrapped up its **2014 Small and Medium Business Routes to Market Study**, which examined U.S. SMB technology adoption and the buying cycle in 10 key solution areas. (Small businesses are defined as those with 1 to 99 employees, and medium businesses are those with 100 to 999 employees.) As part of this study, we gathered SMBs' perspectives on their top business challenges, how technology impacts their business, and their technology spending plans.

One of the study's most dramatic findings is SMBs' growing realization that cloud-based services, especially SaaS applications, offer powerful and capable solutions while decreasing capital outlays, risks and operational costs. Among the 10 solution areas we assessed, online file sharing and collaboration (OFSC) solutions is one in which SMBs seem particularly interested.

This report begins with a brief overview of the key drivers prompting SMBs to adopt cloud-based OFSC solutions. Next, we examine the market opportunity for these solutions, and then we review the key vendors that provide solutions for this market segment. The report concludes with our recommendations for vendors that provide OFSC solutions and SMB customers that are evaluating these solutions.

As part of this study, SMB Group reached out to several vendors that provide these solutions to the SMB segment. Details on each vendor are included at the end of this report.

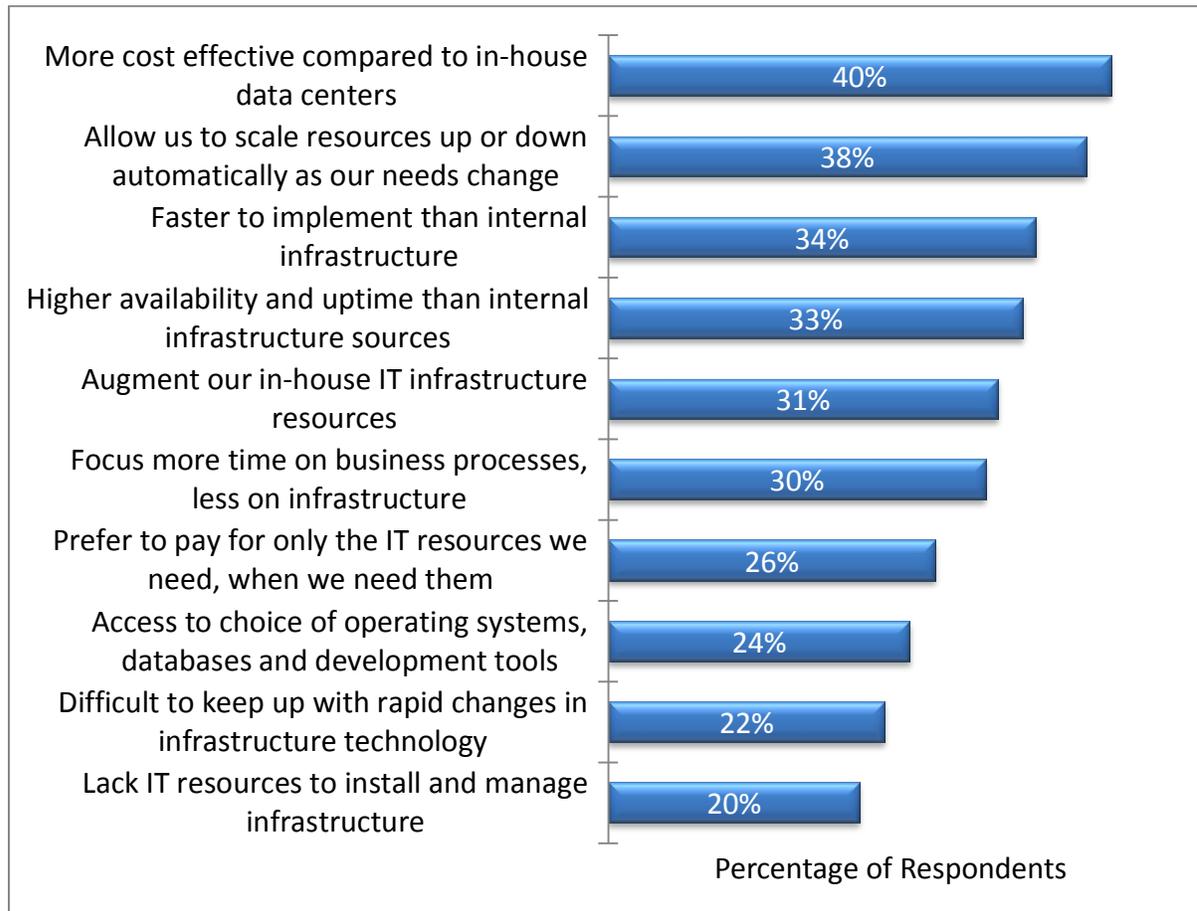
### **SECTION 1: MARKET DEFINITION AND DRIVERS**

The online file sharing and collaboration (OFSC) market includes a cloud-based infrastructure and software application platform with a range of functionalities that enable SMB employees—regardless of file format, device, application environment, operating system or location—to:

- Store and synchronize files from multiple endpoints using a cloud service.
- Upload, manage and distribute content files.
- Share files from multiple endpoints (e.g., desktops, laptops, smartphones, tablets).
- Share files among various applications on a given device.
- Share files and collaborate with colleagues within the company as well as partners and customers outside the company.

Figure 1 lists the top reasons why SMBs are interested in cloud-based IT infrastructure solutions.

**Figure 1: Top Reasons SMBs Are Interested in Cloud-Based IT Infrastructure Solutions**



**Source: SMB Group, 2014**

Several technology trends and market drivers are dramatically changing SMB behavior and prompting SMBs to adopt cloud-based solutions. The primary ones are mobility, social networks, cloud services and an increased focus on information-based decision making.

The consumerization of IT and the increasing acceptance of BYOD programs allow employees to work from multiple devices. Knowledge workers increasingly expect to be able to work and access their business content from any location, at any time and with any internet-enabled device. They also expect to be able to share that content with internal employees and external colleagues/contractors.

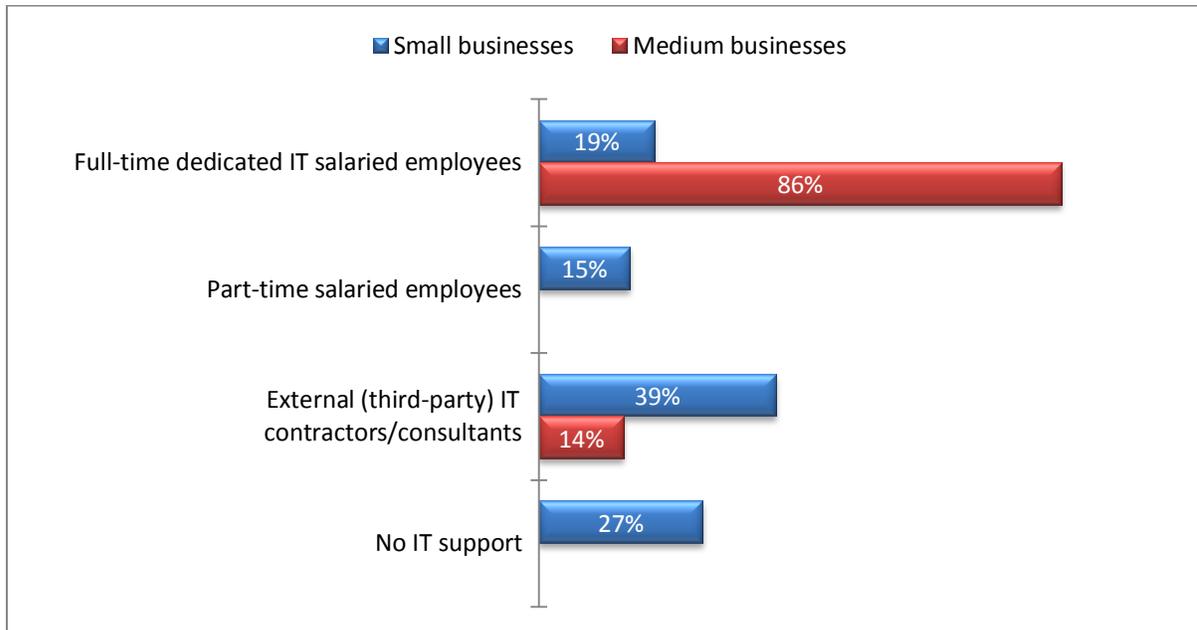
OFSC solutions bring increased expectations and new risks. For example, some employees who use consumer solutions to synchronize and share their personal files expect a similar solution to be available for work files.

Several trends are driving interest in OFSC solutions, including the following:

- **Email-based file sharing:** The use of email for communication and collaboration probably won't cease anytime soon. SMBs currently use email systems for file sharing and collaboration. Sending multiple copies of files consumes the biggest amount of storage space, accounting for 70% to 80% of storage capacity and storage system costs. However, cloud sharing and collaboration solutions are helping SMBs gain control over file proliferation and replication as well as storage costs while increasing employee collaboration and productivity.
- **Accelerating cloud adoption:** SMBs have bought into the cloud promise—a faster, flexible, cost-effective and secure route to obtain the IT solutions they need in order to create and run their businesses. SMB Group research shows SMB use of cloud business and infrastructure applications is poised to grow from 33% to 44% over the coming year.
- **Decreased costs:** Cloud-based solutions deliver applications to users over the internet without requiring the purchase of supporting hardware, software or ongoing maintenance. Because cloud vendors manage all of their customers on a single instance of the software, they can amortize infrastructure-related costs over thousands of customers. This results in substantial economies of scale and skill, reducing the total cost of ownership (TCO) for customers that deploy business solutions, and represents a compelling alternative to traditional on-premises solutions.
- **Rising adoption and functionality of mobile devices:** SMBs have been adopting mobile solutions at a fast and furious pace. SMB Group research indicates 67% of SMBs now view mobile solutions and services as critical to their businesses. 83% have already deployed mobile apps to help improve employee productivity. However, easy-to-use mobile file-sharing and collaboration solutions failed to keep pace with this explosion until solutions such as Dropbox, Box and Google Drive became available. SMBs will be looking for easy-to-deploy, cost-effective file-sharing and collaboration solutions to get more value from their mobile investments.
- **Explosion of content and data:** The volume of data continues to grow at a very rapid rate as SMBs increase their use of data-rich applications and access these applications and content from multiple connected devices. According to a [McKinsey & Company report](#), the amount of global data generated per year is projected to grow 40% versus 5% growth in global IT spending; 30 billion pieces of content are shared on Facebook every month; and 5 billion mobile phones were in use in 2010. This is creating increasing demand for cost-efficient and scalable online storage and content management solutions because SMBs don't have resources to implement and manage this magnitude of growth with their meager internal IT resources.
- **Increase in information-driven decision making:** Data use increasingly will become a key basis of competition and growth for individual SMB companies. SMBs will leverage data-driven strategies to innovate, compete and capture value from information, creating increasing numbers of “knowledge workers” who need to create and access information on a regular basis both from the office and remotely.

- Limited or no IT resources:** SMBs lack the dedicated IT resources of larger enterprises (Figure 2). Most SMBs have limited IT resources, and the resources they do have are fully deployed to keep the IT infrastructure and endpoints up and running. Consequently, they do not have bandwidth to adequately implement and provide ongoing support for on-premises solutions—prompting SMBs to adopt high-quality and high-availability cloud-based solutions.

**Figure 2: IT Resource Availability Among SMBs**



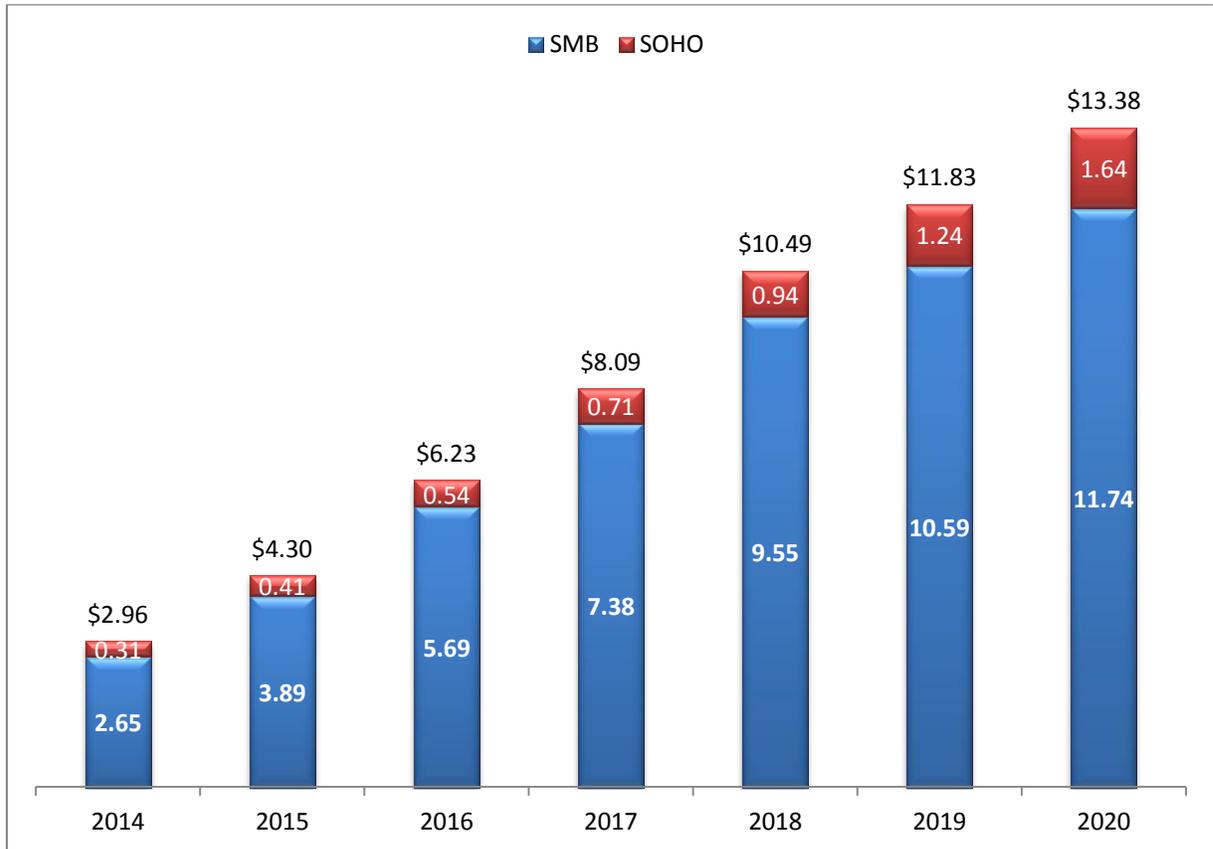
Source: SMB Group, 2014

## SECTION 2: 2014–2020 U.S. MARKET OPPORTUNITY, SIZE AND FORECAST

SMB Group forecasts that the U.S. market for OFSC solutions in the SMB segment will grow from \$2.96 billion in 2014 to \$13.38 billion in 2020 at a CAGR of 29% (Figure 3). This forecast is based on current and projected adoption of these solutions from the recent SMB Group 2014 Small and Medium Business Routes to Market Study, which was completed in February 2014.

In 2014, the SMB segment (companies with 1 to 1,000 employees) accounted for 90% of SMB spending, and small office/home office (SOHO) home-based businesses (companies with no commercial location and with 1 to 4 employees) accounted for 10%.

**Figure 3: Online File Sharing and Collaboration Revenue Forecast**



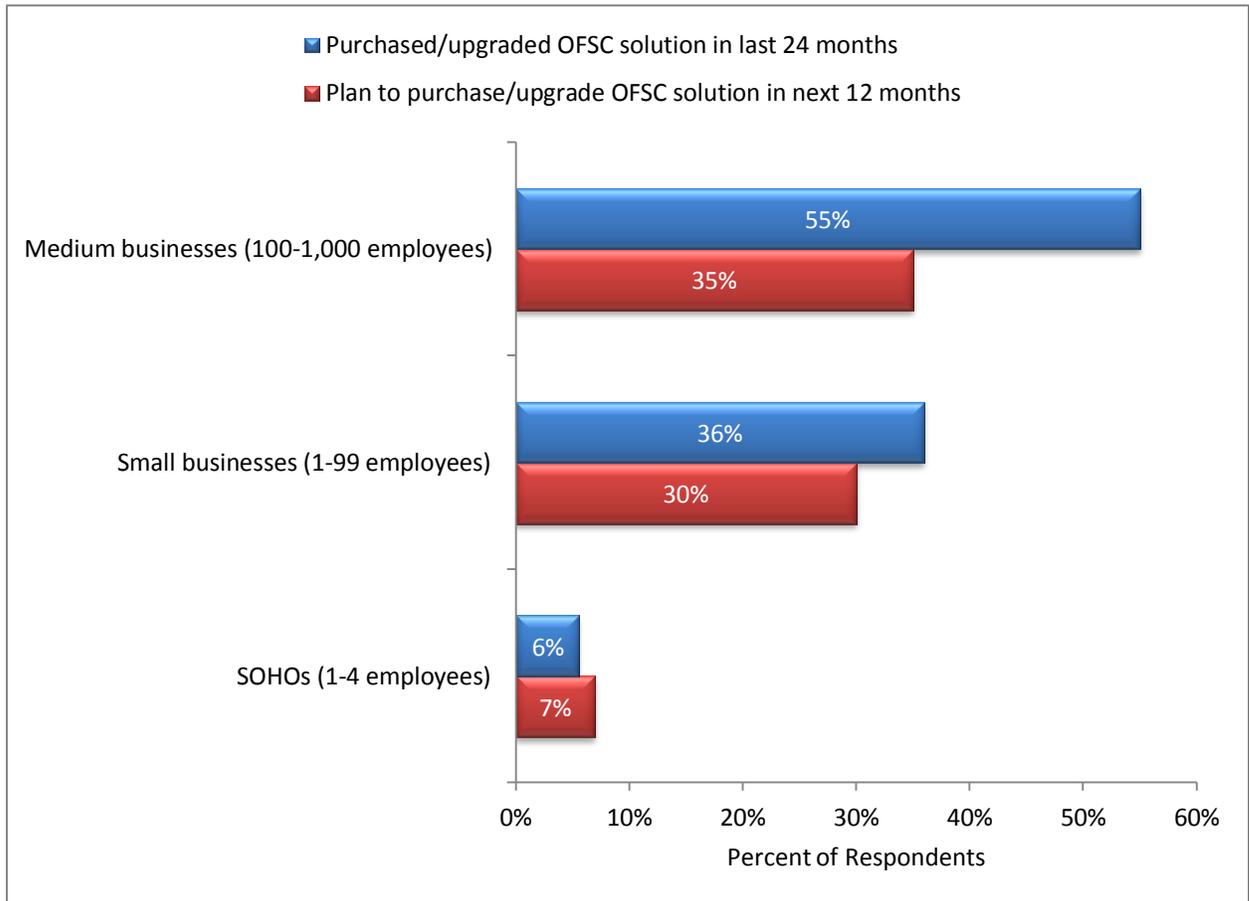
Source: SMB Group, 2014

### SECTION 3: SMB CURRENT AND FUTURE ADOPTION TRENDS

The SMB Group 2014 Small and Medium Business Routes to Market Study looked at OFSC solutions purchased or upgraded in the last 24 months and purchase/upgrade plans for these solutions in the next 12 months in three segments of the SMB market (Figure 4):

- **Small offices/home offices (1 to 4 employees):** Approximately 21 million home office–based firms in the U.S. with around 21 million employees
- **Small businesses (1 to 99 employees):** Approximately 6.5 million firms (not home office–based) in the U.S. with around 55 million employees
- **Medium businesses (100 to 1,000 employees):** Approximately 99,600 firms in the U.S. with around 24 million employees

**Figure 4: Current and Planned Adoption of Online File Sharing and Collaboration**



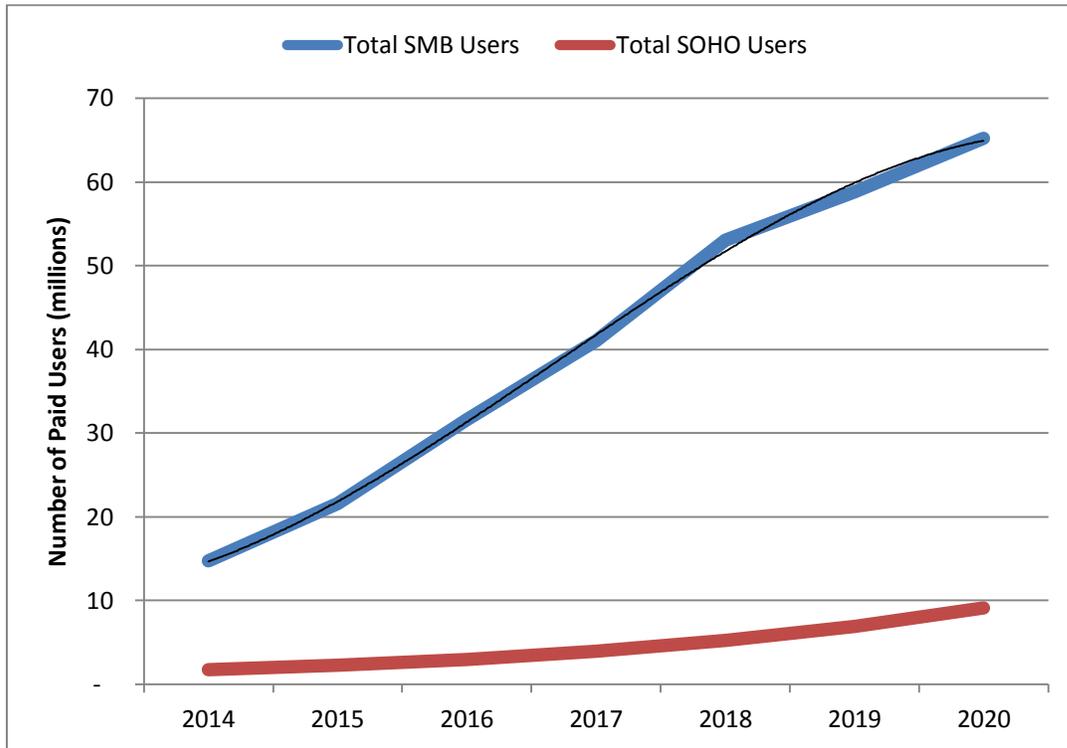
**Source: SMB Group, 2014**

Based on these current and planned adoption trends, we developed a penetration model of OFSC solutions for the SMB segment and a market growth model through 2020.

The total employee base of approximately 100 million in the U.S. SMB segment represents about 16% of the employees using an OFSC solution as paid users. This percentage is based on the adoption rates in Figure 4 and the average number of users per company in the SMB Group’s employee-size segmentation model. Adoption will continue to rise as overall SMB cloud adoption rises and more users experience the ease of use and anytime, anywhere access benefits of OFSC.

The bulk of the paid users currently come from the SMB segment as opposed to the SOHO segment (Figure 5). We hypothesize that the SOHO segment tends to use more free tools because their needs are a lot more basic compared to SMBs’ needs.

Figure 5: SMB Adoption Forecast for Paid Online File Sharing and Collaboration Solutions



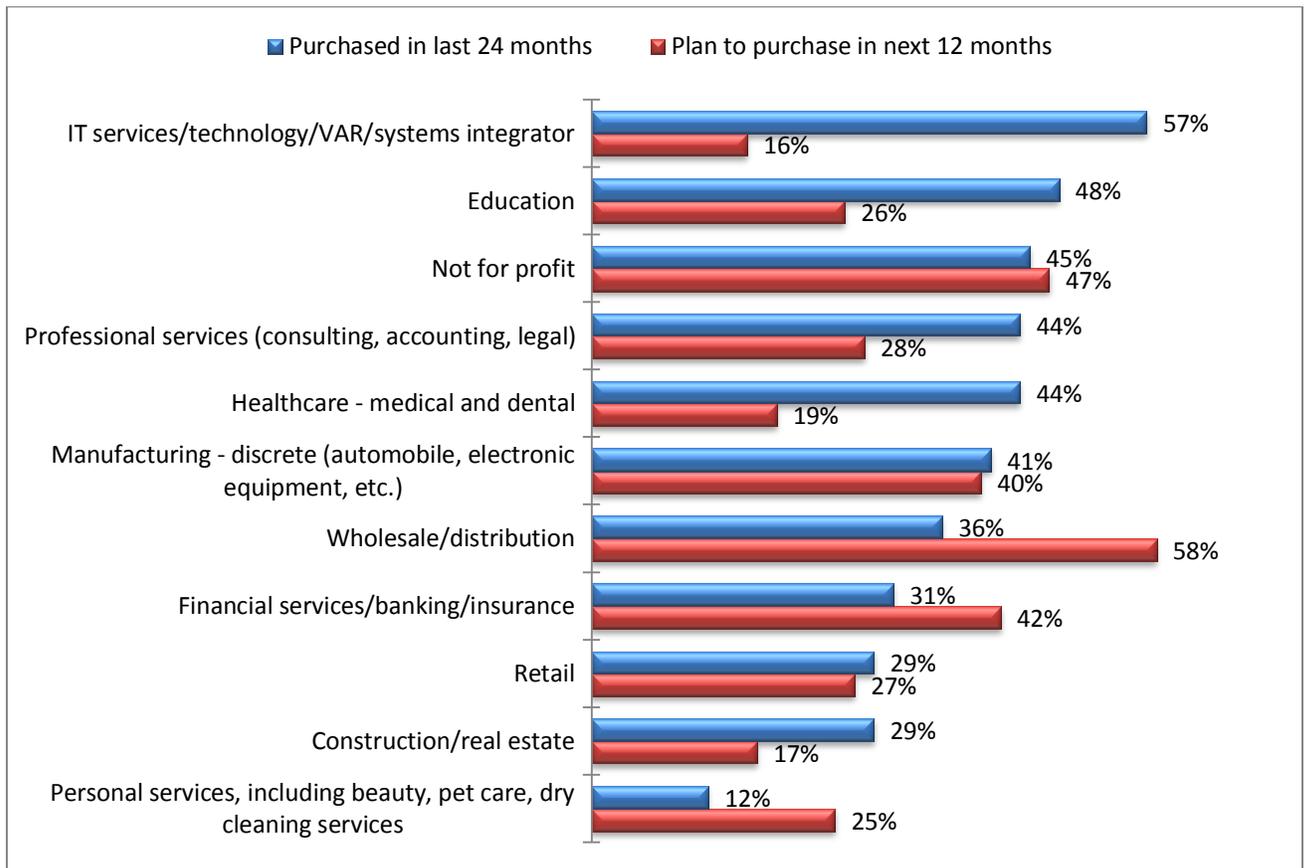
Source: SMB Group, 2014

## SECTION 4: SMB INDUSTRY ADOPTION TRENDS

Every SMB represents a potential user of OFSC technologies. However, the adoption of these solutions will vary based on the industry segment, the proportion of knowledge workers in a given organization, and industry compliance and regulatory requirements.

In our study, we looked at U.S. SMB adoption of OFSC solutions for various industry segments (Figure 6).

**Figure 6: Current and Planned OFSC Adoption by Industry**



Source: SMB Group, 2014

Industries that typically have a high percentage of knowledge workers tend to adopt OFSC solutions at a higher rate than those with a low percentage of knowledge workers. Services-driven industries such as IT services, education, not for profit and professional services are leading the adoption curve.

## SECTION 5: THE ONLINE FILE SHARING AND COLLABORATION VENDOR LANDSCAPE

A large number of vendors provide OFSC solutions to the SMB market. Each vendor approaches this market from different perspectives, and has different strategies and strengths (Figure 7).

Because features and functionalities vary significantly, SMBs must carefully evaluate what they need from an OFSC solution both today and in the near future to determine which solution is the best fit. This is time well spent; the costs and hassles involved in switching OFSC vendors are significant because much time and effort is spent on creating content repositories, training and management.

**Figure 7: Online File Sharing and Collaboration Vendor Segments**

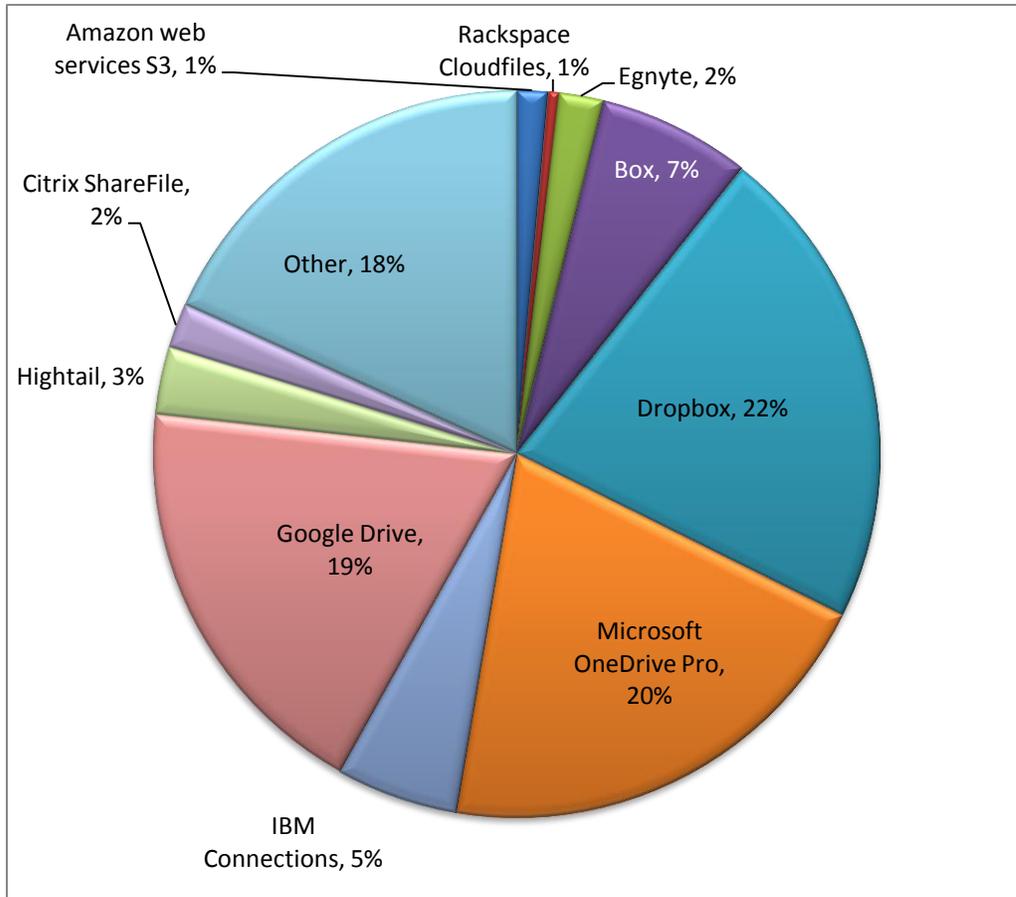


**Source: SMB Group, 2014**

For instance, a manufacturing company that creates large design files and has design and manufacturing centers in other regions of the world may require a solution such as Egnyte, which offers a hybrid cloud-based and on-premises solution to handle the latency associated with transferring very large files over the cloud. Meanwhile, a small accounting firm may want to create a cloud-based file-sharing portal for clients using a solution such as Citrix ShareFile, and a consulting firm may need guest capabilities for client collaboration projects such as those facilitated by IBM's Connect. SMBs that use solutions such as Salesforce.com can use the Salesforce Files cloud solution to share files and collaborate.

SMB Group’s 2014 Small and Medium Business Routes to Market Study reveals that Dropbox, Box, Google Drive, Microsoft OneDrive, IBM Connections, Hightail (formerly YouSendIT), Egnyte and Citrix ShareFile are the leading vendors in the SMB OFSC space (Figure 8). Notable mentions in the Other category were AirWatch, Syncplicity, AT&T, Salesforce, IT Infrastructure vendors (Dell and HP), Mobile solution vendors and VARs that sell rebranded versions of some of the above vendors.

**Figure 8: 2013 Penetration of OFSC Solutions Based on SMB Purchases and Upgrades in the Last 24 Months**



Source: SMB Group, 2014

Dropbox has benefited from an early-mover advantage, its initial focus on the consumer segment that paved a path into SOHOs, and the increasing adoption of BYOD. Meanwhile, vendors such as Microsoft and Google have gained good traction with customers already using their respective cloud email solutions. A large portion of the Other segment comes from private-label solutions provided by some of the above vendors or proprietary solutions developed by the channel (VARs and MSPs).

## SECTION 6: SMB CHALLENGES WITH OFSC SOLUTIONS

OFSC solutions introduce new challenges because they allow users to store and access data via many different devices: desktops, laptops, tablets, smartphones and any other device with Internet connectivity. These challenges include the following:

- **Disparate cloud and on-premises solutions:** Most SMBs store some percentage of their files on desktops/laptops, servers and network attached file servers (NAS devices). Although they are moving a larger percentage of their files to the cloud, the need for on-premises file storage solutions will exist for the foreseeable future. This may be due to security and privacy issues, compliance issues, latency issues related to the transfer of very large files, etc. Managing these two solutions is challenging for SMBs. Vendors that can provide a single file-sharing, management and collaboration solution stand to gain acceptance, especially among larger SMBs. Solutions from vendors such as IBM, Citrix and Egnite provide a single solution that addresses both on-premises content and content stored in the cloud.
- **Siloed files:** Existing OFSC solutions place files in silos rather than within the flow of the business processes they're designed to support. As a result, valuable time gets wasted searching for the right content to accelerate work done in the business process workflow. Salesforce Files transforms content sharing by connecting files and data directly to business processes. Employees encounter the files they need in the course of everyday activities—in relevant groups, attached to accounts, in service cases and in campaigns. This makes files more actionable, relevant and accessible.
- **Security:** Security is a big concern and is critical because SMBs are relying on a third-party vendor to host the content. In a BYOD world, devices that access cloud content are often owned by employees and may not have security software installed. Vendor security support needs to include five categories: encryption, authentication, policy, compliance and management. Solutions from vendors such as Box and IBM address these in a very comprehensive manner.

## SECTION 7: RECOMMENDATIONS FOR OFSC VENDORS

The OFSC segment is becoming crowded with vendors from varied backgrounds, including those focused on consumers, enterprises, mobile management and business applications. Consequently, their service offerings and features differ. This differentiation will become narrower over time.

In addition to providing OFSC technology, the key to success in the SMB segment is to gain a good understanding of SMBs, their business drivers and how to reach them:

- **Differentiation:** Because several vendors offer solutions that sound similar, vendors need to clearly articulate key strengths, differentiation and use case scenarios (see Section 9).
- **Platform:** In addition to a cloud-based file system, OFSC solutions need to include the functionality of a central management platform, with multi-tenancy, metering and self-service. The platform should provide APIs to enable third-party applications to access cloud content. Box has done an excellent job on this front.
- **Collaboration:** What type of collaboration does your solution support? Provide examples to spark new ideas for SMBs. How easy is it to use the solution to collaborate with customers, partners and vendors? Showcase how successful SMBs are achieving ROI by using OFSC solutions in different industries.
- **Management:** This will be an important feature as the number of files and file versions increases and the number of people accessing these files increases. What aspects does your solution address, and does it provide any unique features such as managing both cloud and on-premises files? This is an important consideration for IT managers.
- **Integration:** Vendor solutions need to support integration with LDAP or Active Directory, as well as the provision of APIs that will enable integration with various on-premises and cloud-based applications in use. The APIs will enable third-party developers to rapidly build, update and provision new industry-specific applications that leverage and extend the platform's core functionality.
- **Flexibility:** OFSC solutions and pricing should support a land-and-expand strategy. SMB business users often purchase a few seats to test ease of use, performance and functionality, and later expand the deployment to larger groups of employees. Models such as those provided by IBM, Box and IBM Connections do a good job of facilitating this type of adoption. However, the vendor to watch is Dropbox, with its large installed base in the SOHO market and the lower end of the small business market. If Dropbox lowers its five-license team requirement to three and clearly articulates the benefits and ROI case for business users, it can convert its large installed base of Dropbox Basic to the business version.
- **Security:** Vendors must clearly articulate how OFSC solutions address SMBs' data security and privacy concerns. Employees have access to all types of confidential information including employee data, financial information and customer information. Most vendors have been slowly beefing up their security and compliance support. The vendor that has set the security benchmark is Box.

## SECTION 8: RECOMMENDATIONS FOR SMBs

SMBs rely on OFSC solutions to improve their productivity, their ability to collaborate and their overall work/life balance. Business OFSC solutions are intended to deliver those benefits and more while also protecting company assets. The following recommendations will help SMBs evaluate the plethora of solutions available today:

- **Evaluate the big picture.** What do you need from an OFSC solution today and in the future? For instance, what functionality is most important? Do you want a comprehensive, integrated platform, such as the solutions offered by IBM, Google and Microsoft, or do you prefer solutions you can more quickly deploy for file sharing and synchronization? What privacy safeguards do you need? As always, budgetary considerations and ease of use are also important. To identify the right vendor for your business OFSC solution, first define your business requirements.
- **Consider on-premises file storage requirements.** Do you need to integrate access and management of cloud and on-premises solutions? The costs and hassles involved in switching OFSC vendors are very significant and time consuming. Vendors such as Egnyte and Citrix offer SMBs a single user interface from which they can integrate and manage hybrid environments.
- **Determine your security, privacy, compliance and management requirements.** SMBs planning BYOD initiatives should include online file sharing, synchronization and sharing requirements in conjunction with mobile device management.
- **Determine your integration requirements.** Which of your applications (accounting, ERP, CRM, etc.) will need to integrate with the OFSC solution? What capabilities do you require, and how will different OFSC solutions facilitate this integration? Box currently offers the most extensive application integration capabilities. Citrix ShareFile and IBM Connections also offer some prebuilt integrations with applications. Almost all vendors offer some level of integration with Salesforce.com. See the vendor profiles in Section 10 for integration details.
- **Compare freemium versus paid solutions.** Most major file-sharing vendors offer business plans and bundles for SMB team collaboration. These plans offer administrative controls beyond those provided in the freemium versions. SMBs should strongly consider purchasing or upgrading to business plans from vendors such as Box and Dropbox.
- **Conduct a “proof of concept.”** What works as a viable consumer solution may not be adequate for a business deployment. And it is difficult to assess the functions and features of OFSC solutions by just reading details and viewing a demo. Create a short list of two solutions after reviewing their details and viewing their demos. To validate the usage model and overall user experience of the two selected OFSC solutions, conduct a four-week proof of concept with a few selected mobile knowledge workers in the company, including members from IT. Have participants use a mix of mobile (company-approved BYOD) devices and desktops. Finally, make a selection based on experience from this proof of concept.

- **Educate employees on the proper use of these solutions from a collaboration and security perspective.** Employees are accustomed to their consumer-oriented sync-and-share solutions, and they expect business solutions to function in exactly the same way. Provide training on requirements, security and usage models to help them understand and adapt to the selected solution.

## SECTION 9: SUMMARY AND SMB GROUP PERSPECTIVE

The overall size, scope and growth potential of this dynamic market segment are changing rapidly. The U.S. market for OFSC solutions in the SMB segment is forecasted to grow from \$2.96 billion in 2014 to \$13.38 billion in 2020 at a CAGR of 29%. Adoption will continue to rise as SMB cloud adoption rises and more users experience the ease-of-use and anytime, anywhere access benefits of OFSC—especially in a collaborative environment.

The vendor landscape is crowded with vendors approaching this market from different directions and viewpoints. Most vendors are working to extend their existing solutions and fill in holes in solution functions and features. To succeed in the SMB market, vendors must create and articulate a value proposition and differentiate themselves to address the needs of this segment; develop a platform that enables an ecosystem of partners; and reach SMBs through information sources they frequent, such as their trusted advisors and influencers. In addition, the early movers in this segment will reap benefits as well.

## SECTION 10: VENDORS INCLUDED IN THIS STUDY

To conduct research for this report, SMB Group sought briefings and input from the leading vendors in the OFSC space, including the vendors involved in SMB Group's 2014 Small and Medium Business Routes to Market Study. The list of vendors included:

- AirWatch (a VMware company)
- Box
- Citrix ShareFile
- Dropbox
- Egnyte
- Google Drive
- Hightail
- IBM Connections
- Microsoft OneDrive
- Salesforce Files

## KEY VENDOR DIFFERENTIATORS

SMB Group sought input from the leading vendors in the OFSC space on their key differentiators. Included below is a tabulation of what the vendors provided:

### AirWatch Secure Content Locker

AirWatch's key differentiators for Secure Content Locker include:

- **Cross-platform device support** for iOS, Android, Windows Phone 8, Windows Pro/RT, MacBook, Windows 7 and Windows 8
- **Broad OEM support** including smartphones, tablets and desktops
- **High security** including FIPS-140, AES 256-bit encryption (data in transit, at rest and in use) and advanced authentication (username/password, AD/LDAP, token, single sign-on, two-factor authentication, certificate-based authentication)
- **Native DLP settings** such as prevent copy, paste, screenshot, printing, email and watermarking
- **Flexible deployment options** with a Structured Control Language (SCL) integrated with MDM, or within the workspace, third-party container solutions such as Samsung KNOX or standalone; also, the ability to deploy in a hybrid model in the cloud or on premises with files and metadata
- **Native PDF annotation and full Office document editing support** including check-in and check-out

### Box

Box's key differentiators include:

- **Twofold approach to security: Customer Protection and Enterprise Protection.** Customer Protection involves all of the controls available to customers to protect their implementation of Box, and Enterprise Protection enables SMBs to integrate Box with their current security investments and security controls.
- **Mature content collaboration platform** with a developer base and an ecosystem of third-party applications that are integrated with Box
- **Broad set of integration APIs** for developers and partners to integrate with and develop value-added apps to augment the functionality of the Box solution
- **Native content storage** using cloud solutions such as Salesforce and NetSuite
- **Well-developed partner ecosystem**
- **25 million registered users** as of January 31, 2014

- **Supports over 225,000 organizations** that collectively interact with its content more than 2.5 billion times every three months

### Citrix ShareFile

Citrix's key differentiators for ShareFile include:

- **Vertical innovation and partnerships:** To cater to the unique requirements of key verticals, Citrix has introduced many industry-specific features and services through partnerships and organic innovation, including – ShareFile Archiving for Financial Services, ShareFile Cloud for Healthcare, ShareFile Virtual Data Room.
- **Built in content editor:** Users can create and edit Microsoft Office documents and annotate PDF files from within the ShareFile mobile app. By enabling users to leverage a native editor, IT can restrict the use of third-party editors that create an unsecured copy of a file, putting corporate data at risk.
- **Integrated solution** across the Citrix portfolio of apps.
- **Custom branding** with a team that's dedicated to custom branding an account as soon as a customer signs up.

### Dropbox

Dropbox's key differentiators include:

- **Large user base of 275 million users, still growing more than 100% per year:** These users save more than 1 billion files per day to Dropbox.
- **Fast and reliable sync across a large global customer base:** Dropbox's fast and reliable sync is delivered through several methods: LAN sync, delta sync and automatic bandwidth optimization from any location, on any device, in real time.
- **Simple and easy user experience:** Dropbox's user-first approach to development has helped it deliver a product that is simple and easy to use.
- **Platform-agnostic solution:** Dropbox allows users to access their files on any device, platform or operating system.
- **Robust platform ecosystem and integration with workflow:** With more than 300,000 apps built on the Dropbox platform, businesses can access apps such as document editing, e-signatures, communication, collaboration, project management, content management and security.

## Egnyte

Egnyte's key differentiators include:

- **100% focused on businesses, from SMBs to enterprises:** Egnyte's investments and roadmap items are focused on making enterprise and IT users productive, efficient and secure.
- **Single platform to address many use cases:** Egnyte provides all primary enterprise file service functionality including secure sync and share (EFSS), collaboration, cloud gateway, mobility, cross-site replication and archive/DR.
- **Flexible deployment models:** Egnyte offers a unified platform that supports multiple deployment models—cloud only, on-premises only or hybrid—which provides customers with a choice.
- **Secure access to on-premises data:** Storage Connect allows secure VPN-less access to sensitive/regulated data behind the firewall without moving any data through the cloud. Customers can also use it to avoid cloud storage and migration costs.
- **Storage agnostic:** Egnyte integrates with the wide range of on-premises storage solutions including NetApp, EMC, Netgear, Synology and Seagate for integrated file access with the cloud. Customers also have an option to choose back-end storage on any cloud object store (S3, Google, Azure, Egnyte, etc.).

## Google Drive

Google's key differentiators for Google Drive include:

- **Automatic synchronization:** Any time a device has Internet access, it checks in with Google Drive and ensures files and folders are always up to date. If you change something in Google Drive on one device, it changes everywhere.
- **Social collaboration:** Social collaboration is a large focus for Google Drive, with built-in sharing and discussions, deeply integrated native editors (Google Docs/Sheets/Slides), and integration with Google+ and other leading social solutions.
- **Integration with Google apps:** Google Drive offers highly functional integration with Google apps for business users.
- **Document viewing.** Native viewing of over 30 common file types is possible through the web interface with server-side rendering.
- **Mobile Management.** Google Drive includes comprehensive Google MDM solution.

## Hightail

Hightail's key differentiators include:

- **Easy IT deployment** without the need to "rip and replace" existing repositories or training requirements.
- **Integrations with key applications** including, Outlook, Salesforce, SharePoint, NetSuite, IBM Connections, etc.
- **Rapid adoption** due to ease-of-use but with enterprise-grade security, integration with enterprise applications.
- **Enterprise grade controls** that include user security (password protection, file tracking, verify recipient identity, return receipt, manage sharing permissions), IT controls, content rich admin console/dashboards and usage reports.
- **Seamless experience across all platforms** – Tablets, smart phones, desktop and web.
- **Custom branding** is available to customers to create brand identity and make SMB look bigger, especially when sharing and collaborating with outside partners and agencies.
- **Land and Expand strategy** with the one-funnel freemium approach has generated well over 45 million registered users and more than 150,000 businesses that use Hightail.

## IBM Connections

IBM's key differentiators for IBM Connections include:

- **Cloud security and privacy model** with enterprise-grade auditing and governance capabilities
- **Unique and unlimited guest model** that allows customers to share files and collaborate securely with external users at no extra charge
- **Extensibility to incorporate file sharing and sync** within other applications and business processes via the Social Business Toolkit APIs
- **Flexible deployment options** to meet the needs of customers' environments
- **Broad mobile support** across platforms and devices
- **Tightly integrated** with IBM's social, productivity and collaboration environment

## Microsoft OneDrive

Microsoft's key differentiators for OneDrive include:

- **Real-time collaboration** from within Office
- **Document editing from virtually anywhere** via a web browser using Office Online with increased OneDrive for Business storage from 25 GB to 1 TB per user
- **Easy file access from multiple devices** (including Windows Phone, Windows 8, iOS and Android devices), with native OneDrive for Business and Office Mobile apps
- **Solution supported by a trusted service** that provides enterprise-grade content management, compliance and administrative controls
- **Native integration with Office**, both desktop apps and Office Online, which enables rich collaboration and coauthoring experiences
- **New standalone offer for One Drive for Business** that allows customers to store, sync and share their work files across multiple devices—even without an Office 365 subscription

## Salesforce Files

Salesforce's key differentiators for Salesforce Files include:

- **Salesforce Files transforms content sharing by connecting files and data directly to business processes.** Files are connected where they are most relevant—to projects, campaigns, service cases, opportunities, accounts or groups.
- **Business process integration.** Salesforce Files seamlessly connects any file with sales, service, marketing and other business processes—from any device.
- **Files stored in Salesforce Files adhere to strict security standards** allowing access only to authorized users. Files stored in external repositories retain all of their native repository security settings.
- **Salesforce Files is included with all products of Salesforce.**
- **Salesforce is a 100% multi-tenant SaaS solution.** The solution is geo-distributed and highly available



## SMB GROUP, INC.

SMB Group focuses exclusively on researching and analyzing the highly fragmented SMB market—which is composed of many smaller, more discrete markets. Within the SMB market, SMB Group’s areas of focus include emerging technologies, cloud computing, managed services, business and marketing applications, collaboration and social media solutions, IT infrastructure management and services, and green IT. Read [SMB Group Top 10 SMB Technology Trends For 2014!](#) for our views on game changers in these and other areas of the SMB market.