IDC

SPOTLIGHT

Sponsored by: Slack

The age of AI and agents needs human interaction, collaboration and integrations.

Time to Rethink Collaboration

March 2025

Written by: Wayne Kurtzman, Research Vice President, Social, Communities and Collaboration

Introduction

Collaborative technology is a misnomer. Collaboration consists of actions that people take together to reach shared outcomes. Adding the right technologies to collaborate helps people to scale their efforts to create a robust team and a continuous flow of corporate benefits. Yet IDC's research shows that 85% of all organisations surveyed are literally leaving money on the table when it comes to business collaboration practices (see *IDC's Annual Collaboration Survey, 2024: Measuring the Collaborative Evolution — North America and Western Europe,* IDC #US51376624, August 2024). This makes it harder to hire and retain talent, which makes growing a business more challenging. However, the survey also found that the remaining 15% of respondents are taking their use of collaboration beyond significant time savings and productivity gains. They are creating a new class of metrics and looking at new revenue streams.

It is time to rethink collaboration. Instead of an array of solo applications, the opportunity exists to orchestrate a highly integrated stack of applications that better inform the workforce. This type of orchestration effectively grounds artificial intelligence (AI) with communications, content and context within the flow of work to create a work operating system (Work OS) and the opportunity for additional gains.

AT A GLANCE

WHAT'S IMPORTANT

- 83% of global companies are currently evaluating agents.
- Companies use 6.7 collaborative applications on average in the new AI era.
- AI quality is improved when grounded in real-time collaboration content, context and integrated applications.
- It is time to rethink collaboration's role in an AI economy world.

KEY POINTS

- More than 75% of business leaders say that a collaborative stack helps them to hire and retain talent.
- Collaboration integrations save 33+ hours per week per person.
- New AI outcome-based metrics grounded in collaboration are emerging.

The IDC survey found that mature collaboration companies – that top 15% – often utilised several conferencing applications, a team collaboration platform, and collaborative work management and visual collaboration platforms to bring their workforce together. This approach was so effective at streamlining work that these companies integrated other applications from CRM, HRIS and marketing into the collaboration stack. Having all or almost all of an enterprise's applications connected to a single Work OS is a trait found in companies with a more mature collaboration practice.

Enterprises that have advanced their collaborative culture and stack of collaborative applications are creating a new class of metrics. While time-to-result metrics remain popular and easy to measure, companies are getting closer to tying collaboration, creativity and critical thinking to customer outcomes – the metric that matters most. This outcome is only possible with integrated applications based on collaboration that also meet privacy, governance and compliance requirements.

Collaboration is a people thing; it is what people do. Collaboration is the interpersonal interaction that individuals use to accomplish shared goals. The right collaborative technologies empower people to reach those goals together, regardless of where they work. The right integrated applications help them to measurably amplify their results. Enter AI, which looks at all of the data, engagement and content and takes work to another level. By 2027, 60% of the Global 1000 companies will use AI to create new metrics from collaboration, integrated applications and behaviours, linking them to business outcomes not currently measured, according to *IDC FutureScape: Worldwide Future of Work 2025 Predictions* (IDC #US51665624, October 2024).

The continued rise of AI

Organisations are in the AI experimentation stage now. They are still learning what they can do and how to measure it. Transcription, summarisation, live translations, research and personal insights are just the start. The most mature companies are also using AI and collaboration to tap into lower costs and new revenue streams. All of these use cases will use content to inform context within the AI ecosystem. At IDC, we are seeing agents automate work to act as a multimodal collaborator to accelerate the AI adoption stage (2025–2027). Around 83% of global companies are currently evaluating the use of agents at some level, while 19% of companies worldwide are already using agents to some degree (source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 11,* November 2024). Agentic adoption and activities are key to the next step. In 2027 and beyond, AI-fuelled business will increase. Multimodal foundation models and performance-intensive computing as a service will open new ways of working. Analytics will be more outcome based, knowledge management solutions will be more integrated and impactful, and sales opportunity identification will be more automated. Enterprises will be more connected to their internal teams and their partners and customers, creating dynamic new data sets. And that is only part of the future.

Effective collaboration will be the AI backbone, providing real-time content, context and insights that better align with and measure decision-making. In short, people will make this work. People will be able to automate workflows and reduce mundane work. They will need and use greater critical thinking skills to validate AI and can be more creative at every level, requiring companies to be more open to a sense of community and collaborative activities. Leading companies are already thinking about what they need to create a collaborative ecosystem that goes beyond the workforce and includes their partners and customers.

Customers also expect more ways to communicate and collaborate with companies, regardless of which sales channels are used. Both customers and employees are becoming well acquainted with AI and new communication and collaboration technologies. Evolving the way in which people work is critical to adopting and deploying digital agents (digital labour) successfully.

The future of work is collaborative and integrated

IDC recognises the rise of trust as being central to digital work and acting as the gatekeeper of the employee experience (EX) and customer experience (CX). Trust will drive many of the coming trends, such as having trusted platforms between systems, workforce, partners and customers.

The collaborative stack of applications is critical to success. It is not just a single application for messaging, video conferencing or visual collaboration, but an orchestration of the applications necessary for work. Companies are finding their collaboration optimisation, a stack of applications supporting work at lines of business, business units and core systems such as marketing technology, HRIS and other IT stacks. Collaboration optimisation is a journey, as technologies and interfaces change. Its benefits include providing a single pane of collaborative glass for people to work in while

connecting them to the resources that they need without switching between applications. This approach grounds AI across all disciplines and starts turning work into an online multiplayer event, ensuring more informed decision-making by individuals and the AI ecosystem.

A challenge for IT leaders has been the management of many integrated applications. Today, some companies have over 1,000 application integrations centralised in a single collaboration environment that provides intelligent, seamless and secure collaboration. These organisations tend to see the greatest impact from collaboration and AI. IDC sees improvements that facilitate secure application integrations that support easier management, security, governance and privacy. The expansion of security-centric agents is helping companies to expand integrations while monitoring systems and adapting to many different concerns.

Multimodalities

The world is more visual, interesting and engaging. The workforce lives in a multimodal communication world and increasingly expect their work environment to look and feel like the one that they experience as consumers.

The way in which people communicate and consume information is significantly more advanced than just a decade ago. New tools are democratising the language of storytelling at work. As technology becomes easier and content evolves, so does the way in which companies report on business functions.

AI supports a variety of communication and collaborative modalities, such as text, video, images, and tactile (touch) and kinaesthetic (hands-on movement engagement) modalities. As companies introduce AI at the content and data levels, they enable richer collaboration that will yield new insights and types of reporting.

Taking advantage of these trends requires an openness to reconsidering enterprise collaboration and how it can stay flexible as technologies rapidly evolve. This is especially true concerning CX and EX.

Collaboration – the multiplayer interface to business

Online teamwork is developing features that appear in multiplayer role-play games. This includes promoting collaboration to achieve common goals using different work roles, including people's personalities and resourcefulness as well as their adaptability, situational management and decision-making skills. Empathy and negotiation are part of this new, more connected world. The integrated collaborative stack of applications helps to drive this work community to be more engaged, aligned and connected.

This requires not just technology but also behavioural changes that must be fostered, modelled and mentored at every level of a company. An organisation's choice of technologies and integrations can help – or hinder – the development of teamwork and collaboration.

Rethink everything

When more people are connected, new types of relationships form. Relationships are key to sales and the hiring and retaining of employees. New areas of trust, collaborations, and (soon with AI) insights and metrics are emerging that connect internal actions, engagements and the outcomes – as well as the income – of the business.

Definitions

The following terms are defined by IDC as follows:

- **Agents** move organisations towards integrated and/or autonomous workforces. They help organisations to optimise such workforces by proactively and autonomously performing actions to achieve predefined goals, working independently or in conjunction with other AI systems. In turn, this provides greater agency to human employees to focus on more innovative, complex and higher-value work.
- **Collaboration** is built on the interpersonal activities that people perform to accomplish shared goals. The right applications help those activities to scale in order to drive efficiencies and productivity. Integrations to collaboration application(s) enable greater productivity through alignment. A culture that supports these interpersonal activities drives adoption and a sense of community.
- **Collaboration optimisation** is the addition and/or integration of collaboration applications, integrated with the applications and systems that people need to do their work. Optimisation does not mean enterprise standardisation, as some applications meet strong line-of-business needs, but rather the balance between needs and results to enable work in the applications that people use most.

Benefits

The benefits of collaboration continue to evolve as companies rethink what collaboration means. Future changes in data compression, bandwidth and how people use applications outside of work will drive this evolution. IDC sees acceleration in this pattern, which directly affects EX and CX.

While the addition of agents will take some getting used to, it will enable people to focus on more creative, innovative, complex and higher-value work.

For some, collaboration applications mean chat or messaging. The maturity of an enterprise's collaboration practice, including its culture and technology stack, makes a difference in defining collaboration. When companies ranked the top five benefits of collaboration in IDC's 2024 *Annual Collaboration Survey,* 46% pointed to better communications and 43% to better problem-solving abilities.

Companies that foster and reward collaboration are realising accelerated individual and team productivity (38% of IDC survey respondents), and a similar number report effective knowledge sharing. However, one-third of companies that have integrated more than ten applications and are working from a single pane of glass are creating new metrics.

While most metrics are based in the industrial era, today more value comes from people rather than just factory output. The new metrics still measure time, but they are starting to tie creativity and critical thinking within teams to what matters most: customer outcomes, customer lifetime value and advocacy scores. The metrics report an increase in the infusion of creativity into work, even when using AI.

By focusing on time and productivity, companies with a well-integrated stack of applications save, on average, 33 hours per person per week (source: IDC's *Annual Collaboration Survey,* 2024).

IDC finds that over 75% of business leaders say a collaborative stack of applications helps them to hire and retain talent – up 10%+ over 2023. Workforce members already know that a good collaboration implementation helps people to work

in a smarter and more efficient way. 'What are you using to collaborate?' is becoming a more prevalent question in the interview process. Simply put, a company's integrated collaboration applications can make or break its ability to recruit young or talented candidates.

Trends

It was thought that after the COVID-19 pandemic ended, organisations would consolidate on one or two collaboration applications, and some tried. Companies have found that communication quality and overall productivity suffer when they remove applications that work for specific teams or the enterprise. IDC research shows that companies now use an average of 6.7 collaborative applications – a number that continues to rise slowly (source: IDC's *Annual Collaboration Survey,* 2024). Integrations and a core collaborative stack of applications enable the workers to use what they need while being productive across the enterprise.

The world continues to evolve rapidly, and there is no going back to decades-old ways of doing things. We are on the verge of significant technological advancements that require businesses to be agile and flexible to meet evolving needs and economies. Companies must rethink the collaboration experience with changing needs and economies in mind and note the following trends:

- **The world is more visual, and so is collaboration.** The average person can create high-end visual content from their mobile device – and does. Pairing AI with better data compression, microprocessors and data speed will change the look of business communications. What will be consistent is human collaboration, which will develop trends in role-based multiplayer activities.
- **The rise of AI is rooted in collaboration.** As we move through the stages of AI, conversations across different modalities will root corporate data in recency and frequency of conversational content. Recency and frequency are popular search engine signals and will be important in determining AI responses and agentic actions. This alone makes collaboration vitally important in the evolution of any enterprise.
- **Integrations are a superpower.** While application integrations are one of the more challenging solutions for security and governance leaders, agents and other developments will make integrations easier and more secure to deploy. More importantly, integrations bring all the required information to the people who need it and open the door for new analytics.
- **Agentic powers scale people, processes and outcomes in new ways.** Leveraging people, collaboration, integrations and data will create an array of new metrics, new products and new ideas that will start to reshape markets.
- **Using voice is easier than typing.** Increasingly, people search with voice, avoiding the need to correct their typing. This also liberates workers from looking for and using special syntax to drive automation. The organisation's collaboration platform needs to support this, as will the Internet-of-Things devices making their way into the workplace (wherever it is).
- **Rethinking analytics is easier with multiple integrations to the collaboration stack.** There will be new revenue drivers and benchmarks in the near future. Companies are already developing new metrics that tie critical thinking and creativity more closely to actual customer outcomes, advocacy scores and lifetime value, using a data-mapping

resource that defines the elements of the metrics being measured. As the company brings these metrics together, its analytics can evolve as its market and enterprise grow into an AI-fuelled business model.

- **Communication platforms are more engaging.** Everyone can now produce high-quality videos and other evolving content. As people use these different modalities to communicate outside of work, multimodal communications will continue to rapidly move to the enterprise. Companies already have concerns about their ability to keep up with the applications that people are using.
- **Welcome to the rise of the multiplayer, role-player workspace.** Just as multiplayer games utilise roles for goals, enterprise collaboration can have that same feel. Companies build this type of collaboration workspace from a collaborative culture, workflow and integrations with various systems that reduce barriers to successful work.
- **In an AI world, collaboration puts the spotlight on humanity.** Even when people receive assistance from agents and other AI elements, they still enable the new AI-fuelled business era.
- **The fear of missing out by not embracing collaboration** will lead competitors to create a strategic advantage using current and historical knowledge that becomes their growth annuity, built on collaborative teams.

Considering Slack

Slack aims to reshape collaboration by bringing AI and agents to where people are already engaged in everyday conversations and workflows.

Today, 82 of the Fortune 100 collaborate using Slack's enterprise collaboration apps with global teams, partners and customers. Companies such as Ford, IBM, Target, Capital One, Accenture and Rocket Companies run mission-critical business processes using Slack app integrations and workflows.

Slack originally gained adoption by connecting people across time zones (or just in the same building) in a more immediate, engaging and less formal way than standard-issue email and video conferencing apps. Now Slack offers a conversational framework that supports not just human-to-human interactions but also human-to-agent and agent-to-agent. With generative AI, Slack has become a collaborative work OS that's ready for humans and agents to work together.

Salesforce's announcement of Agentforce 2.0 makes clear the vision behind its acquisition of Slack. Agents need direct access to the data in CRM to perform customer-facing tasks, and they get smarter with the addition of unstructured data in everyday employee conversations in Slack. Agentforce makes possible a new category of employee-facing agents that can take on specialised roles within the organisation and scale the capacity of teams. These employee agents need a place to work, where they can tap into collective knowledge, access and take action in connected apps and data in a trusted environment. For Agentforce, that place is Slack.

Custom agents built in Agentforce's Agent Builder can be deployed in Slack, where employees can find the right agent for the job in the Agentforce Hub, chat with agents in messages and channels, and direct agents to do common tasks such as sending a message or creating a channel. In Slack, agents work like members of the team, and they become more useful over time as they learn from the context of everyday conversations and act according to an organisation's business practices. With agents, every organisation now has the ability to scale its workforce without limits.

Challenges

Collaboration is what people do together around common goals, even when augmented with artificial intelligence. Slack is partly responsible for this category existing in the first place. The company has accelerated its development to cross modalities and use cases to better reflect how people collaborate externally, including with corporate protections. While there is a risk that others may redefine what to expect from collaborative applications, Slack has responded by augmenting people's abilities through the addition of agents. The company has also refined its focus on its user base and grown a successful global community.

Conclusion

AI agents will create new productivity and better outcomes by leveraging more shared knowledge.

IDC believes that the market for team collaboration applications will continue to outpace the overall growth of the enterprise software application market. New features, including the evolution of AI and new multimodal features, will continue to drive market growth. Effective collaboration opens the door to ideation, innovation and new ways of measuring success. AI agents will create new productivity and better outcomes by leveraging more shared knowledge. There is awareness now that every employee is a potential knowledge worker and contributor. To create more effective AI agents and AI solutions, their knowledge of workers must be included. The most effective way is to empower the whole workforce to use collaborative applications, regardless of where they work. The actions and conversations of people captured in collaboration applications and integrated within the collaboration stack will serve to ground AI with context and content that will help to augment work.

Collaboration will become more integrated, visual and engaging, developing a multiplayer feel. As part of this evolution, AI will change everything, from automation to analytics. Those organisations that fail to embrace the evolution of collaboration and enable it culturally will be at a competitive disadvantage in their markets.

About the analyst



Wayne Kurtzman, *Research Vice President, Social, Communities and Collaboration*

Wayne is a frequent speaker and quoted source on the future of work, enterprise collaboration, communities and social platforms. A former journalist and adjunct instructor, Wayne has led emerging technology programmes for global companies resulting in increased engagements and new revenue streams.

MESSAGE FROM THE SPONSOR

Slack, a leader in the IDC MarketScape: Worldwide Team Collaboration Applications 2024 Vendor Assessment, is reshaping collaboration by bringing AI and agents to where people are already engaged in everyday conversations and workflows.

Slack is the work operating system that brings people, apps, processes and data together with trusted generative and agentic AI, fuelling productivity for every employee in every role.

Businesses use Slack in several key ways that demonstrate the changing nature of collaboration:

- **Connect teams with frontline workers, partners and customers** in secure channels and flexible video tools such as huddles and clips, in a consumer-grade experience on desktop or mobile
- **Automate workflows** with no-code tools and over 2,600 enterprise app integrations
- **Build and deploy custom apps** with the Slack API and AI-ready developer platform
- **Bring data into the flow of work** with Slack lists and canvas, Salesforce channels that surface CRM data, and Tableau and Mulesoft integrations for any data source
- **Customise and deploy Agentforce** to perform specialised work autonomously alongside employees, supporting sales, service, HR, IT and more.

To learn more and get started with Slack, visit slack.com.

IDC Custom Solutions

The content in this paper was adapted from existing IDC research published on www.idc.com.

IDC Research, Inc.
140 Kendrick Street
Building B
Needham, MA 02494, USA
T 508.872.8200
F 508.935.4015
blogs.idc.com
www.idc.com

IDC Custom Solutions produced this publication. The opinion, analysis and research results presented herein are drawn from more detailed research and analysis that IDC independently conducted and published, unless specific vendor sponsorship is noted. IDC Custom Solutions makes IDC content available in a wide range of formats for distribution by various companies. This IDC material is licensed for external use, and in no way does the use or publication of IDC research indicate IDC's endorsement of the sponsor's or licensee's products or strategies.

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services and events for the information technology, telecommunications and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives and the investment community to make fact-based technology decisions and to achieve their key business objectives.

©2025 IDC. Reproduction is forbidden unless authorised. All rights reserved. CCPA