



# **VENDOR SELECTION MATRIX™ SALES ENGAGEMENT MANAGEMENT**

## **THE TOP GLOBAL VENDORS 2022 /2023**

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**Research In Action**

**October 2022**

# FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research In Action Vendor Selection Matrix™ reports so unique. This approach is one of our key differentiators in market research. For this report we interviewed 1,500 marketing and business managers with budget responsibility in enterprises globally. We are profiling those vendors which achieved the best evaluations scores from the buyers after disregarding those with fewer than 15 evaluations.

The need to automate elements of **sales engagement management (SEM)** was proposed many years ago (I would claim to be that analyst in question) but not readily adopted in all companies, especially those dominated by a Chief Sales Officer. But the COVID-19 pandemic has set off a period of head-spinning change in many companies, even industries. Digital transformations are being realized faster than ever thought possible. Firms go digital in a matter of days, not years, and offer new services almost overnight. And one of the most drastic consequences of the move to digital marketing, selling and buying, is on the role of that traditional salesperson (again, let me note that I co-wrote the Forrester report "Death of the B2B Salesman" back in 2015).

Our method of describing a business process and asking business managers to name software vendor(s) they associate with it collates a list of those vendors most relevant for other potential buyers. The vendor landscape discovered in this survey includes the leading SEM vendors, most of whom cover just part of the SEM process family, not all. Many of the respondents work with more than SEM one vendor and this was reflected in their survey replies.

This report provides you with a useful guide to important SEM market trends, names the top vendors as selected by 1,500 users based upon product, company and service quality, and will help you make an informed decision regarding which vendors could best fit your needs. This study can be used as a starting point before a more detailed evaluation of vendors which fits your exact requirements and market evolution.

Always keeping you informed!

Peter O'Neill

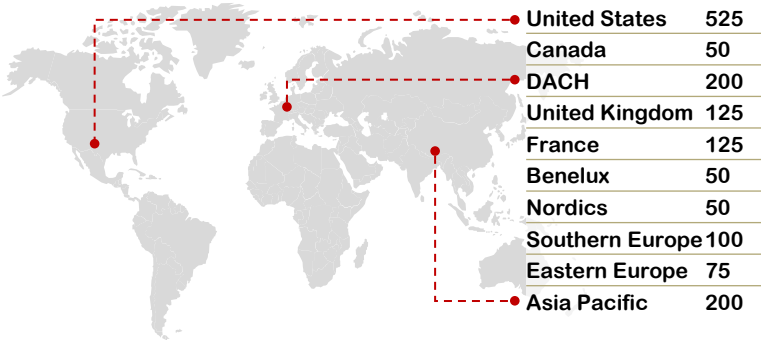
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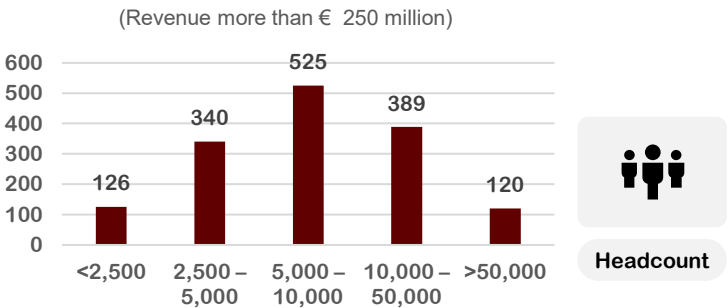


# OUR SURVEY DEMOGRAPHICS: MARKETING AUTOMATION

## Country Breakdown



## Company Size Breakdown



## Industry Breakdown

Energy	97
Financial Services	256
Government & Non-Profit	92
Life Sciences	200
Manufacturing	350
Technology, Media & Telecoms	200
Consumer Packaged Goods & Retail	105
Professional Services	100
Travel & Transportation	100
Total	1,500

## Job Title Breakdown

Business Unit Marketing Executive	179	Chief Digital Office	62
Corporate Marketing Executive	167	Sourcing/Vendor Management	87
VP /Director Marketing Operations	146	COO	52
VP/Director Demand Generation	135	VP IT	39
Business Executive	129	Chief Sales Officer	31
VP/Director Sales	121	CFO	25
VP/Director Marketing Analytics	112	Chief Sales Officer	15
CIO	85	Total	1,500
VP/Director Marketing Technology	66		
CTO	64		

All Research in Action surveys are gender neutral and 100% confidential.



100,000+  
Data Points



1,500  
Marketing and Business Managers



37%  
Analyst's Opinion



63%  
Survey Results

## The Vendor Selection Matrix™ Evaluation Methodology:

The basis of our competitive vendor evaluation reports is always an extensive buyer survey. We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations. The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.



# OUR MARKET IMPACT OVER 12 MONTHS



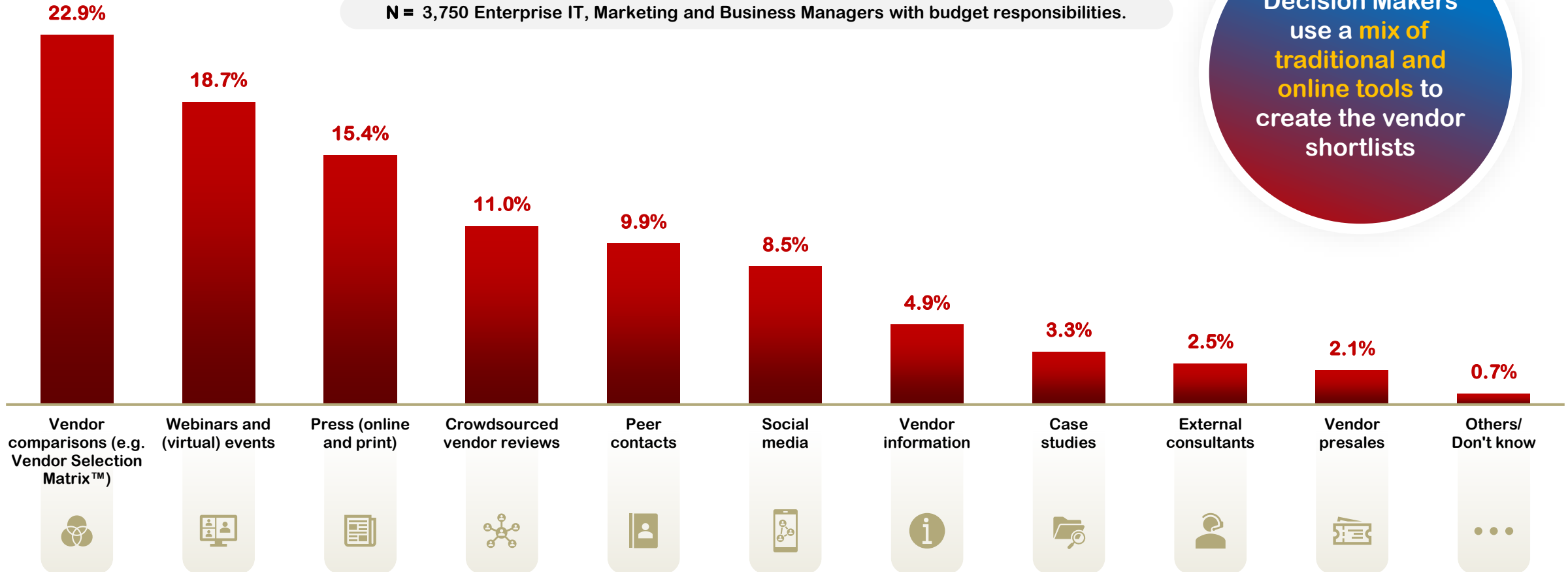
**Vendor Selection Matrix™: The right mix makes all the difference**  
**63% customer evaluations + 37% analyst's judgement = 100% success**



# WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?

N = 3,750 Enterprise IT, Marketing and Business Managers with budget responsibilities.

Decision Makers use a **mix of traditional and online tools** to create the vendor shortlists



# WHAT IS SALES ENGAGEMENT MANAGEMENT?

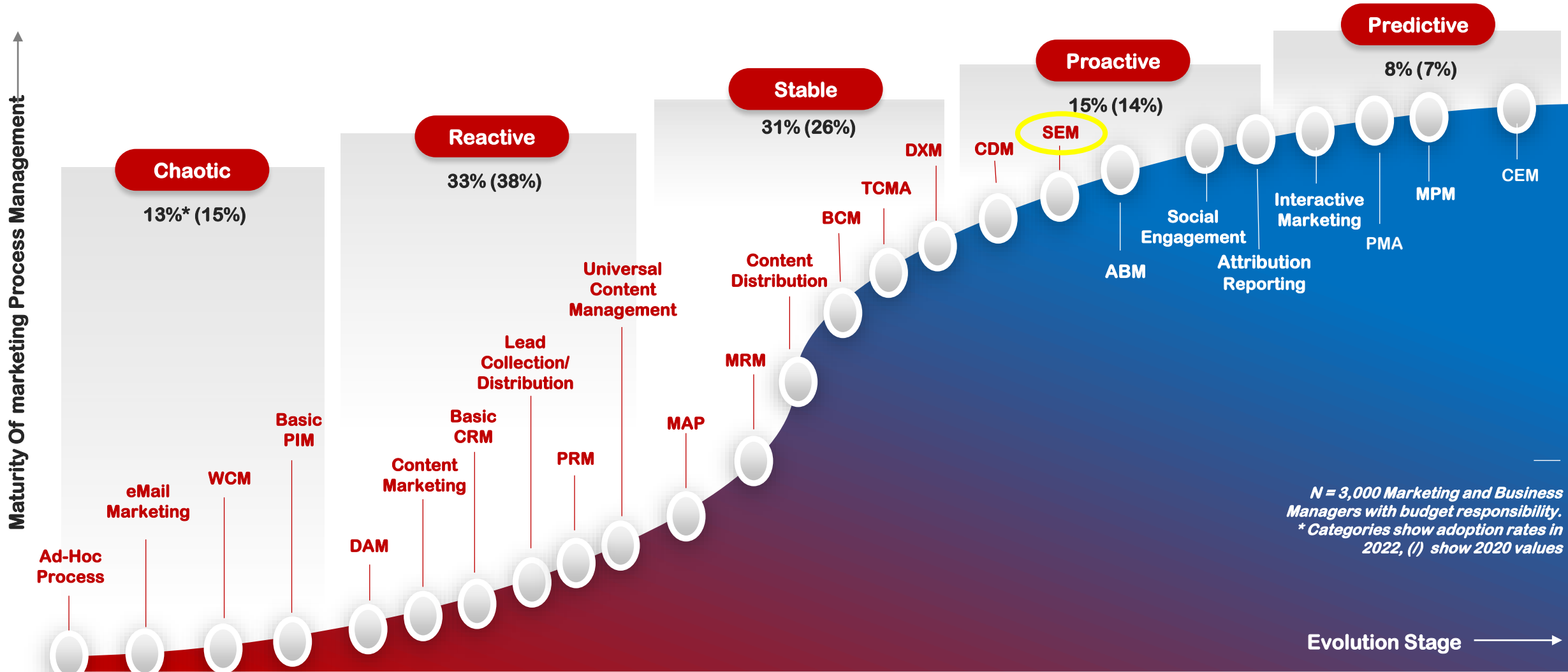
- The Sales Engagement Management (SEM) covers all processes making sellers successful. In the last years, it's matured from
  - An initial project of marketers providing relevant digital assets to a salesperson to support their customer interactions;
  - Adding content personalization, distribution and external sharing in the interests of a superior buying experience;
  - To the integration with sales training modules delivered on-demand plus sales operational functions so that a sales professional has a fully-functioning integrated "office" system.
- Whether in the field or in inside-sales, the modern seller needs to manage and share content in many forms; communicate with customers via email, phone, messaging, and video; and understand engagement via advanced content analytics.
- SEM is transforming. In 2022, buyer behavior has evolved to become primarily digital, so traditional in-person selling is no longer the norm. According to research conducted by McKinsey, 70 percent of business decision-makers are open to fully self-serve or remote purchases in excess of \$ 50,000, and 27 percent would spend more than \$ 500,000\*. This increasing impact of digital marketing and sales means that automated sales strategies and analytics will join the SEM process family. Already in many companies, the sales organization includes a new generation of customer success managers, with different informational needs to the traditional salesperson.
- The SEM process is further expanding to cater for many other customer-facing (at least digitally) employees outside of sales. Customer loyalty is increasingly brittle if needs are not met. McKinsey also report that eight in ten B2B decision makers say they will actively look for a new supplier if performance guarantees (e.g., a full refund if a certain level of performance is not met) are not offered. So, the customer interaction extends through the company and is no longer dominated by sales.
- Some analysts and vendors are starting to propose the broader descriptor Revenue Enablement or Revenue Management, where Revenue is an aggregation of sales and retention rate,.

\* [See this McKinsey report](#)



# MARKETING PROCESS MANAGEMENT MATURITY S-CURVE 2022

Our surveys and consulting work enable us to continually assess the maturity of marketing organizations (combination of organization, process and technology) and we observe these five phases –SEM projects are mostly executed by more mature companies, and we estimate that 40-45% of companies have automated, or will be automating, this process in 2022-23.



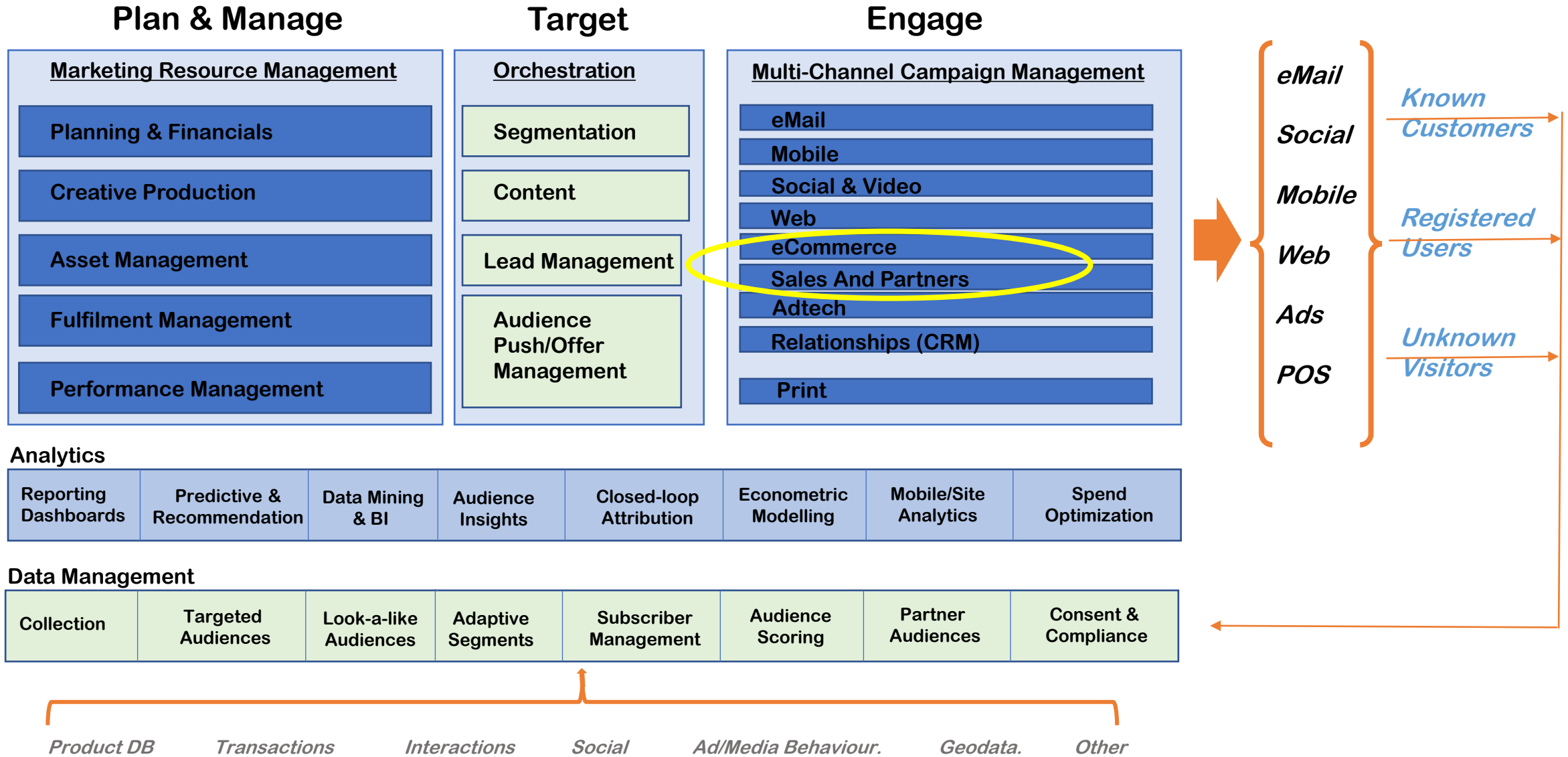
N = 3,000 Marketing and Business Managers with budget responsibility.  
\* Categories show adoption rates in 2022, (I) show 2020 values

All acronyms are defined in the report Appendix



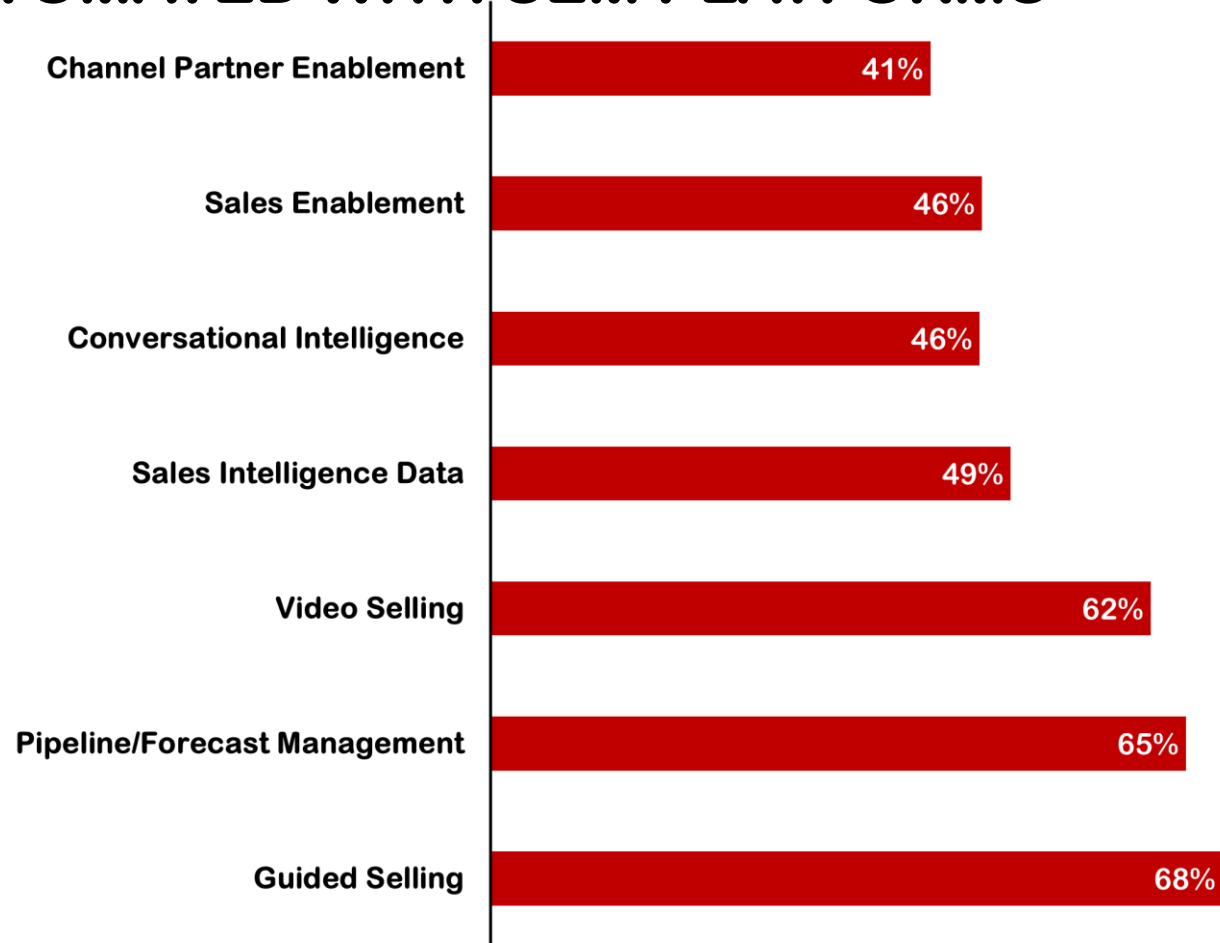
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# OVERALL MARKETING AUTOMATION MARKETECHTURE



# RESEARCH:

## THE MOST IMPORTANT PROCESSES TO BE AUTOMATED WITH SEM PLATFORMS



N = 1,309 Marketing and Business Managers with budget responsibilities for SEM.

We asked, “Which of the following processes do you plan to automate with your SEM system?” and collected this list of top priorities from the respondents. They could select as many as they wanted from a list of 17 processes.

The highest NEW interest is in improving Guided Selling and Pipeline Management, followed by support for Video Selling.

The next two priorities are being able to provide data and analytics (including alerts and recommendations) to salespeople.

Other priorities named were Account-Based Selling and Proposal Generation, all others were below 20%.

Vendors take note: you should reflect these customer priorities in your marketing messaging – if you have a solution for it.



# RESEARCH:

## MANY PROCESSES ARE ALREADY AUTOMATED



N = 1,309 Marketing and Business Managers with budget responsibilities for SEM.

For completeness, this is the full list of processes, along with the number of respondents reporting it as “already automated”.

Several of the processes are already adequately automated in most companies: calendaring, sales enablement, and onboarding/training.

The high Sales Intelligence number is an anomaly and cannot be explained.

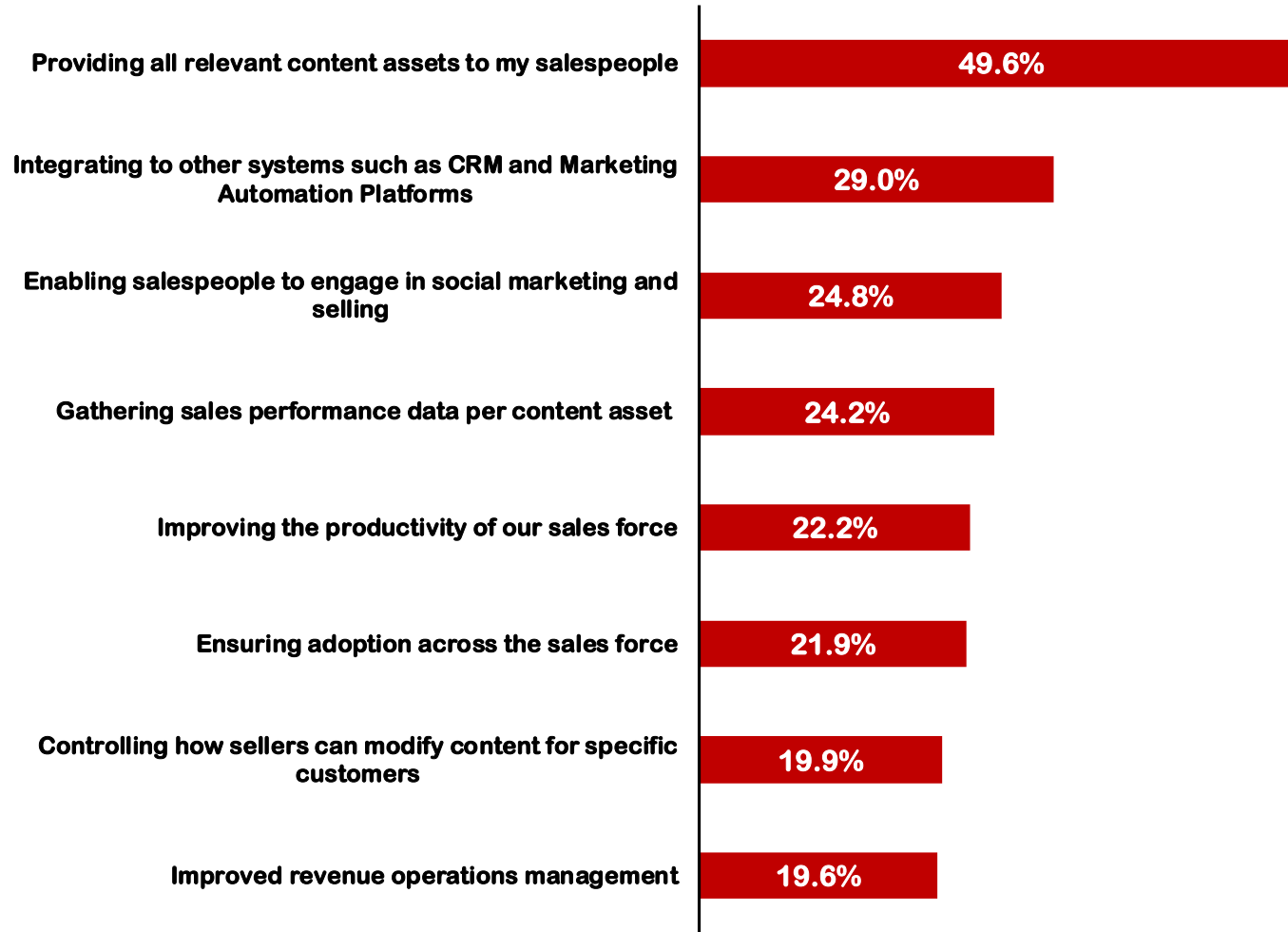
Note: the respondents could also select “Not Needed” to a process. Over 80% of respondents stated these processes were not needed:

Immersive Experiences  
Workflow Management  
Sales Gamification.



# RESEARCH:

## THE MAJOR DRIVERS FOR USING SEM



N = 1,309 Marketing and Business Managers with budget responsibilities (Respondents could select up to three drivers).

We asked, “Which anticipated top 3 benefits are driving your investment in sales engagement management automation in 2022? (select up to three)”

Overall, nearly **one half** of companies are focused on sales content management. 29% say that integrating to other marketing asset systems is important. One quarter value the opportunity to support social selling.

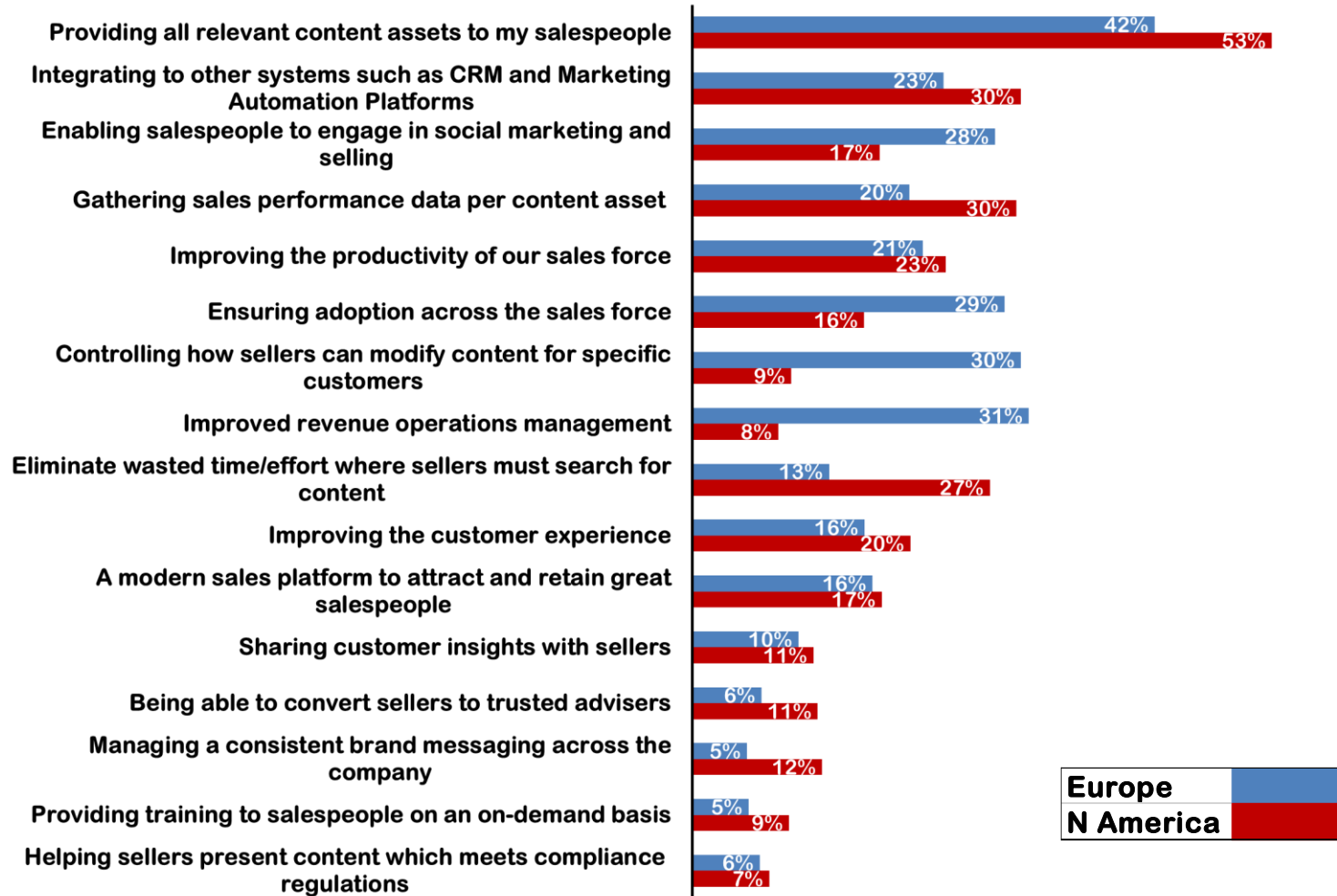
However, these priorities vary across the regions, as shown on the next page.

Vendors take note: you should reflect these customer priorities in your marketing messaging – if you have a solution for it.



# RESEARCH:

## SEM DRIVERS DIFFER ACROSS THE REGIONS



N = 1,309 Marketing and Business Managers with budget responsibilities (Respondents could select up to three drivers).

When we compare answers in North America to those in Europe, we find many differences in emphasis.

Social selling seems to be more important in Europe. Content control is more considered in Europe, as is ensuring adoption. The benefit of improving revenue operations is recognized by four times as many European executives compared to North American.

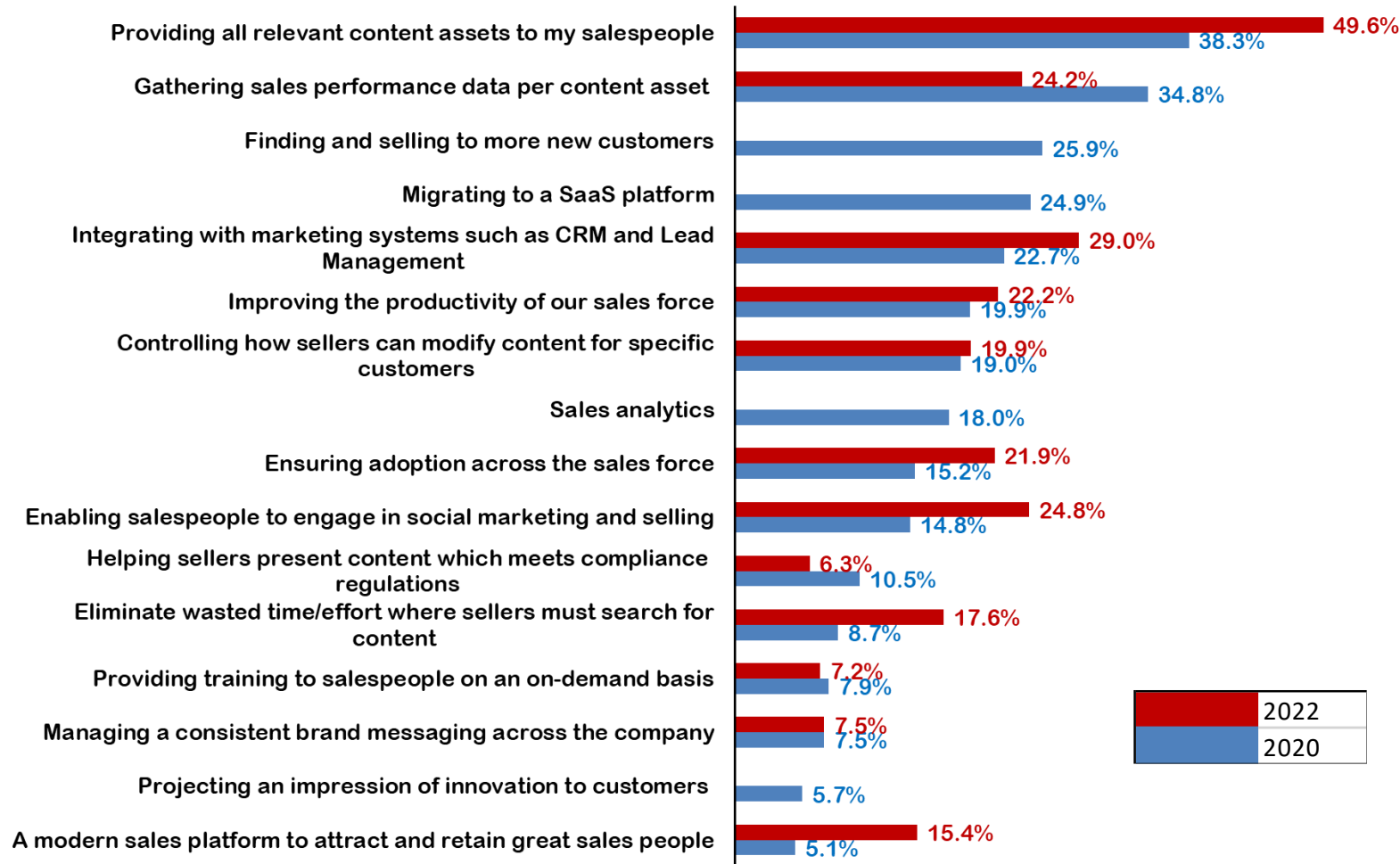
More American companies want to provide relevant content assets to salespeople and to integrate to other systems.

Vendors take note: you should reflect these customer priorities in your international marketing messaging – if you have a solution for it.



# RESEARCH:

## COMPARING SEM DRIVERS 2020 TO 2022



N = 1,309 (2022) and 1,377 (2020) Marketing and Business Managers with budget responsibilities for SEM.

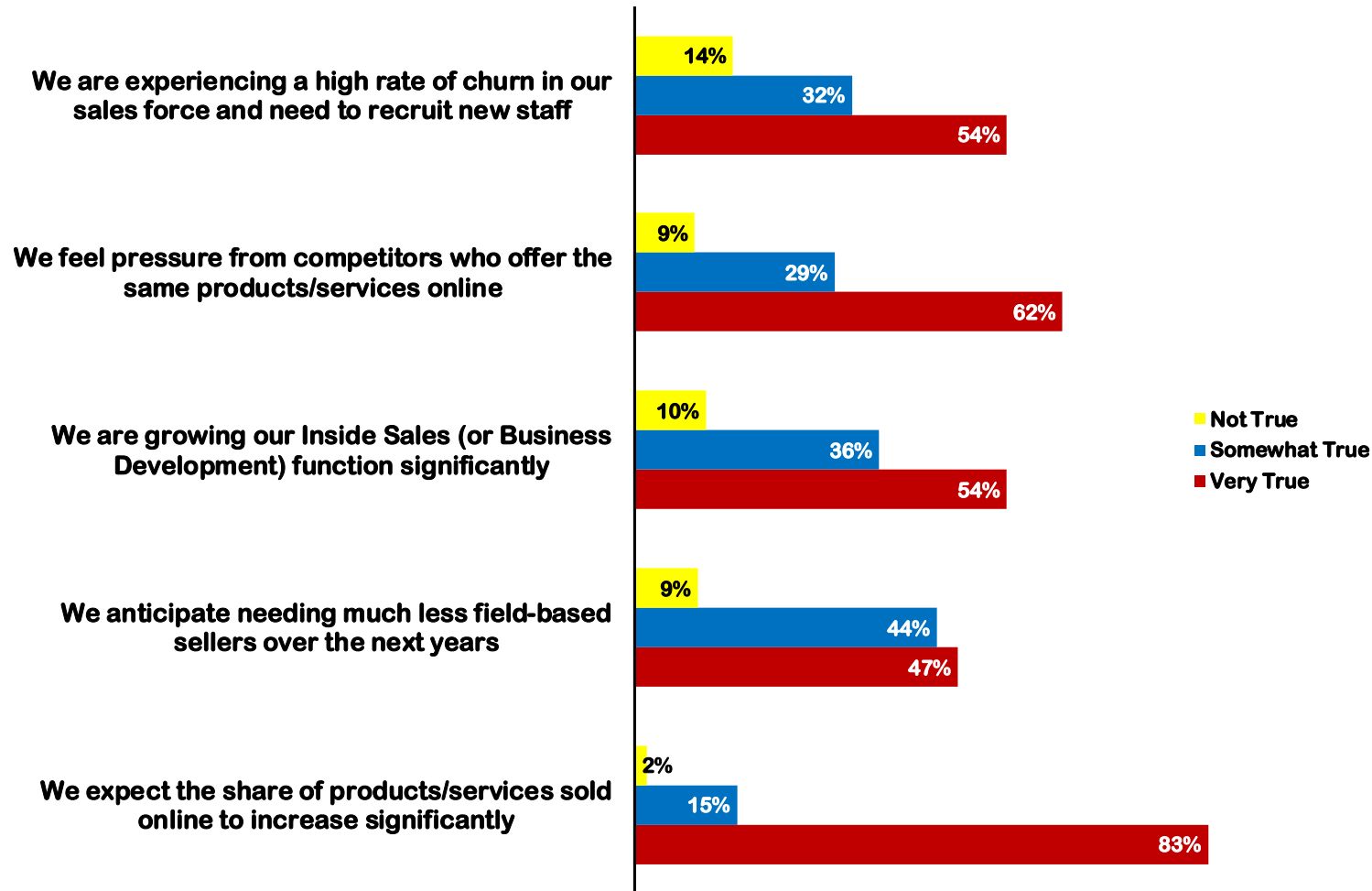
We asked the same question in our 2020 survey and there has been significant change in the prioritization. Some of the 2020 options were not listed in 2022, and vice versa.

Overall, there is now much more clarity about why SEM solutions are required. This reflects the rising maturity in companies around their sales enablement programs but also the impact (and resulting urgency) of digital marketing and selling.



# RESEARCH:

## CHANGES WILL AFFECT SALES ENGAGEMENT



N = 1,309 Marketing and Business Managers with budget responsibilities.

We asked: “Do you expect changes in your sales channel mix in the next years, due to eCommerce, customer preferences and competitive pressures?”.

The top change is the rise of eCommerce which reduces the dependency on a field sales force.

The Inside Sales (BusDev) function requires more, but also different, SEM functions.

The phenomena of high rate of churn is happening in most business disciplines now (due to changes caused by COVID-19), but it is probably more of a longer-term issue in sales.

Vendors should reflect these pain points in their marketing messaging – if they have solution for it.



# INSIGHTS: TOP SEM MARKET TRENDS 2022/2023

- **SEM investments are needed because customer experience starts with the buying experience.** There is a clear drive in most sectors to optimize the customer experience. This includes the buying phase: whether planning a complex purchase or just routinely ordering replenishment supplies. The introduction of SEM tools can transform the buying process.
- **Changes in business behavior accelerates demand for SEM.** Both buyers and sellers have now learned to rely on digital platforms to share content and communicate. For security and compliance reasons, a company-wide SEM platform is preferable to each seller doing their own thing. The concept of a "digital sales room", where information is shared is now well established.
- **SEM projects are often consolidation projects.** SEM investments focus on rationalizing the current myriad of centrally-installed and self-loaded applications found on a seller's device; providing one platform of robust tools for sellers to use in their engagement with increasingly informed buyers. It will support sellers in their internal collaboration, as well as optimizing and supporting them for all communications with external parties.
- **SEM analytics and guidance will become mission-critical.** A bad customer experience is when sellers call on the wrong contacts at a bad time with unhelpful information. Companies will not only expect SEM system to avoid that scenario, but they will also prefer solutions that proactively generate an optimal experience for both parties. Modern SEM systems should prompt sellers that their account is "in market" in a timely manner, and provide relevant recommendations, content and coaching.



# INSIGHTS: TOP SEM VENDOR CHALLENGES 2022/2023

- **SEM winners will provide the best user experience.** The greatest barrier to success for SEM is adoption. Successful SEM solution vendors will focus on providing the optimal relationship-management experience through superior integrations, an empathetic user interface, adaptability and device-flexibility.
- **SEM vendors need to address new user audiences.** Engagement with customers has extended to new roles such as customer success, pre-sales consulting, post-sales service and even marketing. Their needs are similar to those in sales but toned and weighted differently. SEM vendors must learn this new language to communicate effectively.
- **SEM in practice requires considered change management.** Marketing and sales professionals are extremely sensitive to new IT systems after adopting digital marketing CRM platforms in a (too) rapid manner in the last years. If SEM, which improves (but also disrupts) established working practices, is perceived as a time and motion reporting system, there will be resistance. Vendors need experienced implementation consultants/partners.
- **SEM success depends most on the integration sub-projects (not a vendor strength).** A new SEM solution must feed off existing systems in Marketing and other departments and provide reporting and insights compatible to other business systems. Each company has a different environment, so good project managers are evaluating the specific integration capabilities of potential SEM vendors with diligence.
- **SEM may become lost within a larger RevTech solution.** As part of an overall trend towards adopting more capable revenue management technology, SEM vendors will be challenged by Account-Based Marketing and Customer Data Management vendors. Many of these vendors will already have a strategic supplier relationship and can provide “just-enough” SEM capabilities to lock out a pure-play SEM vendor.



# VENDOR SELECTION MATRIX™

## SALES ENGAGEMENT MANAGEMENT



These are the top vendors as selected by 1,500 buyer companies based upon product, company and service quality.

VENDOR NAME	PRODUCT(S)
ACCENT TECHNOLOGIES	Accent Sales Enablement Platform
APPAROUND	Apparound
BIGTINCAN	Bigtincan Sales Enablement Platform (Learning Hub, Content Hub, Engagement Hub)
BRAINSHARK (BIGTINCAN)	Bigtincan Learning
CLEARSLIDE (BIGTINCAN)	Bigtincan Engagement Hub
CLIENTPOINT	Clientpoint Experience
HIGHSPOT	Highspot
MEDIAFLY	Mediafly Revenue360
PITCHER	Pitcher Super App
PROLIFIQ	Prolifiq Sales Enablement Suite
SALESLOFT	Salesloft Platform
SALESPHERE	SaleSphere
SAP	SAP Sales Cloud, SAP Litmos for Customer Experience Edition
SEISMIC	Seismic Enablement Cloud
SHOWPAD	Showpad

**NOTE:** If a vendor does not respond, Research in Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a vendor scorecard will not be written.

This list is alphabetical and includes the top vendors and solutions named in the Sales Engagement Management survey and scored by the survey respondents.

The resulting vendor landscape is a mix of

- sales enablement (content and/or training) providers
- sales acceleration platforms
- Digital Sales Room solutions

Most respondents work with two or more of these vendors.

Additional vendors that were cited but did not list in the Top 15, or had less than 15 ratings:

- CUSTOMERSHOW
- GROOVE
- OUTREACH
- ZOOMIFIER

The respondents named the BRANDS they knew the best.

- Brainshark and Clearslide have been acquired by Bigtincan.
- In addition to their own solution at SAP, Mediafly is the only sales enablement "SAP Endorsed App".



# VENDOR SELECTION MATRIX™

## SALES ENGAGEMENT MANAGEMENT



### Vendor Quick Facts

VENDOR NAME	Market Presence	Growth Rate	Customer Traction	GOOD TO KNOW
ACCENT TECHNOLOGIES	Medium	Medium	Good	Helping revenue teams increase sales revenue with data science and AI.
APPAROUND	Medium	Medium	Medium	An “all-in-one sales tool” for sharing content, building quotes, and managing contracts.
BIGTINCAN	Very Big	Very High	Strong	Supporting guided sales experiences with patented Artificial Intelligence.
BRAINSHARK	Very Big	Very High	Strong	Now part of the Bigtincan family.
CLEARSLIDE	Very Big	Very High	Strong	Now part of the Bigtincan family.
CLIENTPOINT	Big	Medium	Medium	A simple platform for better sales & stronger relationships.
HIGHSPOT	Very Big	Very High	Strong	Continuing its customer acquisition and expansion strategy success.
MEDIAFLY	Big	Medium	Good	Revenue enablement platform delivering visibility and insights into every interaction.
PITCHER	Medium	Medium	Medium	Uniting the sales enablement functions and customer-facing revenue processes.
PROLIFIQ	Small	Medium	Medium	Making the most out of every sales opportunity.
SALESLOFT	Medium	Medium	Medium	A leading sales acceleration solution, the only one, in this SEM landscape.
SALESPHERE	Medium	Medium	Medium	The sales accelerator in your pocket.
SAP	Medium	Medium	Medium	Sales automation software for enterprises.
SEISMIC	Very Big	Very High	Strong	Seismic ignites sales and revenue growth for its customers.
SHOWPAD	Big	High	Good	Enabling sales engagement success in enterprises globally.

MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION
Very Big	Very High	Strong
Big	High	Good
Medium	Medium	Medium
Small	Low	Low

#### NOTES:

- Market Presence combines the market share and perceived Mindshare (or Share of Mind).
- Growth Rate is the anticipated growth rate for this year where Medium is the average growth for this market.
- Customer Traction combines the vendor’s customer retention rate and the Research In Action Recommendation Index (RI). The RI is collected and calculated by asking the survey participants: “Would you recommend this vendor in this market to your peers - Yes or No?”.



# VENDOR SELECTION MATRIX™:

## EVALUATION CRITERIA

STRATEGY

Vision And Go-To-Market	30%	<ul style="list-style-type: none"><li>› Does the company have a coherent vision in line with the most probable future market scenarios?</li><li>› Does the go-to-market and sales strategy fit the target market and customers?</li></ul>
Innovation And Differentiation	30%	<ul style="list-style-type: none"><li>› How innovative is the company in this market?</li><li>› Does the solution have a unique selling proposition and clear market differentiators?</li></ul>
Viability And Execution Capabilities	15%	<ul style="list-style-type: none"><li>› How likely is the long-term survival of the company in this market?</li><li>› Does the company have the necessary resources to execute the strategy?</li></ul>
Recommendation Index	25%	<ul style="list-style-type: none"><li>› Would customers recommend this vendor in this market to their peers?</li></ul>

## EXECUTION

**Breadth And  
Depth Of Solution  
Offering**

**30%**

- › Does the solution cover all necessary capabilities expected by customers?

**Market Share  
And Growth**

**15%**

- › How big is the company's market share and is it growing above the market rate?

**Customer  
Satisfaction**

**25%**

- › How satisfied are customers with the solution and the vendor today?

**Price Versus  
Value Ratio**

**30%**

- › How do customers rate the relationship between the price and perceived value of the solution?

### NOTES:

- 63% of the evaluation is based on the survey results, 37% is based on the analysts' assessment.
  - 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
  - 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
  - 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.
- The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".



# VENDOR SELECTION MATRIX™

## SALES ENGAGEMENT MANAGEMENT



	STRATEGY	EXECUTION	TOTAL
1. SEISMIC	4.75	4.83	9.58
2. BIGTINCAN	4.68	4.83	9.50
3. HIGHSPOT	4.68	4.79	9.46
4. CLEARSLIDE	4.60	4.73	9.33
5. BRAINSHARK	4.60	4.71	9.31
6. SHOWPAD	4.43	4.60	9.03
7. PITCHER	4.39	4.58	8.96
8. APPAROUND	4.33	4.33	8.65
9. MEDIAFLY	4.15	4.21	8.36
10. SALESLOFT	4.08	4.19	8.26
11. SAP	4.15	3.89	8.04
12. PROLIFIQ	4.00	3.79	7.79
13. CLIENTPOINT	3.83	3.86	7.69
14. SALESPIHERE	3.79	3.83	7.61
15. ACCENT TECHNOLOGIES	3.73	3.69	7.41

### Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



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# VENDOR SELECTION MATRIX™

## SALES ENGAGEMENT MANAGEMENT

**Seismic is the global leader in Sales Engagement Management, igniting sales and revenue growth for its customers.**



STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.75	Breadth And Depth Of Solution Offering	5.00
Innovation And Differentiation	4.75	Market Share And Growth	4.75
Viability And Execution Capabilities	4.75	Customer Satisfaction	4.75
Recommendation Index	4.75	Price Versus Value Ratio	4.75
	<b>4.75</b>		<b>4.83</b>

### GENERAL:

Founded 2010 in San Diego, Seismic has over 1,500 employees in 14 offices worldwide. In the past years, it has grown organically and through acquisitions of vendors like Savo, Percolate and GrapeVine6.

Seismic tripled its customer base this year to a total of 2,200 companies. 66 of the new customers are EMEA-based. It also saw a 100% increase year-over-year in engaged users.

The vendor's headcount has grown 40% year over year, with over 500 employees in product and engineering.

The vendor offers helps teams get enablement right with its Seismic Enablement Cloud, a unified platform providing customer-facing teams with the right skills, content, tools, and insights to effectively engage customers and drive growth.

### STRATEGY:

Seismic provides a solution for both marketing and sales teams to deliver compelling storytelling throughout the buyer journey.

With probably the largest R&D headcount in this market, and ample funding (it is a software unicorn – valuation of over \$1 billion), the product set is expanding further for both marketing and sales clientele.

The solution also covers the emerging customer success function and caters to client needs in channel partner enablement – the most public example is IBM whose partners are cross-licensed.

It received a very high score in the survey for its Vision and Go-to-Market capabilities. As well as being the Global Winner, the vendor also scored a very high Recommendation Index of 98%.

### EXECUTION:

Seismic manages and delivers content for its clients across 13 data centers around the world and supports 15 languages. It markets to the Tech, FSI, Healthcare, Manufacturing, and Life Sciences sectors with solution scenarios for Marketing, Sales, Sales Enablement and even Buyers. With the acquisition of Lessonly, it now has fully integrated learning and coaching capabilities, but continues to integrate with other leading providers based on customer preference.

As well as being the overall global winner in the survey, the respondents also score Seismic highest in the Customer Satisfaction and Price vs Value Ratio categories.

Seismic received a maximum score of 5 for Breadth and Depth of Solution Offering from the respondents.

### BOTTOM LINE:

The vendor is the Global Winner in our SEM survey, as in 2020, and has all the resources to continue that success in a high-growth market.

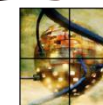
Partnerships with Outreach, GoogleSuite or SalesLoft complete a strong engagement management platform.

Seismic is one of only two SEM vendors listed in the Forbes Cloud 100, produced in partnership with Bessemer Venture Partners and Salesforce Ventures, which recognizes the best private cloud companies in the world.



#### Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



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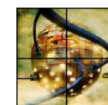
# THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

## Vendor Selection Matrix™ Disclaimer:

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation. Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings. The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable. Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact. The opinions expressed are subject to change without further notice. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. All trademarks are recognized as the property of the respective companies.

## About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.



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