

The Aragon Research Globe™ for Sales Enablement Platforms, 2023

Intelligence Comes to Sales Enablement

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Issue: Who are the providers of sales enablement and how will they evolve?



SUMMARY

Aragon's fifth Aragon Research Globe™ for sales enablement platforms examines 15 major providers in a market category that has become the de facto digital work hub for sales professionals. While the market is still split between sales content automation and sales communications, conversational intelligence and intelligence more generally are poised to reshape the sales enablement market.

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Introduction

The SEP market continues to grow and expand. In 2022, more providers added sales coaching and learning features to their offering. While there is still both a sales content management and a sales communication line of demarcation between vendors, Aragon feels that there will be consolidation to get to the single uber-SEP suite. This fifth Aragon Globe report evaluates 15 major providers in a market that continues to see growth, investment, and a compelling utility that many enterprises have still not discovered.

The Aragon Research Globe™ for Sales Enablement Platforms evaluates the technology providers that allow an enterprise to manage all aspects and touchpoints of the sales process. SEPs, which work in conjunction with CRM platforms, are essentially a digital work hub for sales professionals. There's enough differentiation between a horizontal work hub and a sales enablement platform that there's no longer debate that a sales team must have an SEP.

The Growing Enablement Platform—Learning as Part of the Stack

The sales enablement market has been evolving over the last several years. While we did discuss the growing features of sales coaching and learning in the past, in 2022, there is no doubt that it has become a core capability that a majority of providers offer.

Conversational Intelligence as Part of Sales Enablement

Voice analytics, also known as conversational intelligence, has been a best-of-breed capability, and now it is becoming a feature set inside of sales enablement. A majority of SEP providers now offer conversational intelligence which allows reps and managers to understand things such as talk time and key words discussed by competitors—all in the effort to learn from those conversations and have better ones in the future.

Aragon feels that these capabilities, along with guided selling, are leading towards a shift towards the intelligent sales enablement platform.

SEP, CRM, and the Growing Sales Tech Stack

In 2022, it became very clear in a remote selling environment that more technology was needed to deliver the productivity and results that sales teams need and expect. In a majority of the cases, you have sales content management, sales communications, and learning as an integrated stack tied very tightly to the CRM system of record.

The missing link in all of this is having the right content to share with prospects and the right scripts that contain the talk tracks. Because of the need for content, sales and marketing are still tied together at the hip. There is a growing need for intelligence in SEP, and that has led to more providers making moves.

Sales Enablement Platform Market and Capabilities Overview

The proliferation of disconnected sales enablement apps and the existence of too many app categories were two catalysts that led to the emergence of the sales enablement platform market. Today, the market exists with two different types of sales work hubs. A number of SEP providers focus on sales communications as their lead set of capabilities.

Because sales enablement platforms streamline and condense the digital tools needed in the sales process, they act as the new digital sales suite for sales professionals, akin to an 'office for sales.' It is important to know that pricing for sales enablement tools can be more than traditional collaboration. Street prices can range from \$15-125 per user per month. This is less than what is being spent on CRM, but it shows that when a business application makes an impact, buyers will pay for it.

Sales Communications and Engagement

Sales communications providers focus on customer engagement via multiple channels, including phone calls, emails, and text and SMS messaging. Sales communications is often needed for sales teams that are doing prospecting in the early stages of a sale.

Sales content-focused SEP providers focus on the creation and sharing of content and leveraging analytics to understand what is being viewed and what content is working. The new change this year is that document generation has become a standard capability for many providers.

Sales Content Automation

Many of the providers in this report focus on sales content and what Aragon is now calling sales content automation. Content is often shared to close a deal. The analytics of what is happening with that content are often key to making a deal happen faster.

Market Growth Attracts Larger Enterprises

SEPs have become a de facto part of the sales enablement stack and have a defined set of capabilities (see Note 1). Small and large enterprises have realized that generic office tools do not provide the levels of productivity that sales teams need, nor do they interface with CRM platforms, which is critical.

As we discuss in this Research Note, the SEP market is now intelligent, and this will allow sales teams to analyze what is happening in deals by leveraging sophisticated analytics that can understand content engagement, communications intelligence, and take us to the next level, which is about guided selling (see the Shift to Intelligence section below).

Nearly all providers have seen growth in this category, and Aragon has forecasted continued growth over the next six years. This is due primarily to the fact that enterprises realized the value of SEPs, and many new users have begun procurements.

Aragon still expects that there will be market consolidation, and signs of that are already happening as providers such as Bigtincan and Seismic continue to innovate through acquisition.

What enterprises need is a robust set of sophisticated tools in an all-in-one platform in order to engage with savvy customers, and to enable sharing of content and better communications. Marketing is increasingly playing an active role in selecting and funding sales enablement platforms.

Note 1: The Summary of the Key Capabilities of SEP offerings

Sales Content Creation

- Create content on the fly or by mixing and matching existing content.
- Ability to create and add rich media such as video into content.
- Native content editing or integration with Google G Suite or Microsoft Office 365.

Sales Content Automation

- Manage and recommend content.
- Store content natively or on a CRM or ECM.
- Have advanced analytics on what is occurring.
- Mobile access to content and presentations.
- Analytics on content that is working to engage.

Workflow and Content Automation

- The ability to generate new customized documents based on rules.

Communications and Cadences

- Ability to communicate with prospects via phone calls, email, or SMS communications, all via mobile.
- Advanced analytics.
- Analytics on what recipients do with the message and the content.
- Ability to do sales campaigns and sequence them.

Advanced Content Analytics

- Understand who opens a document and what they look at.
- Be able to segment users on opens and viewing time.

Partner Applications (Apps)

- Partner applications are key components of a sales enablement platform.
- SEP providers that enable partner apps will provide more value to buyers and enable innovation.

Guided Selling: Customer Revenue Optimization

- Guided selling is beginning to emerge as basic recommendations based on other behaviors.
- More advanced offerings incorporate a sales methodology.

Sales Coaching and Learning

- Sales Training and Onboarding
- Video Role Plays
- Coaching for Reps and Managers

The SEP Playbook: Content, Communications, and Learning

Today, many enterprises can get both sales content management and sales coaching and learning from one provider. However, given the playbooks that sales content management providers now offer, it starts to encroach on some of the sales cadences that sales communications providers offer. This is one of the reasons why we think there really is one SEP market, and that sales communications providers will be acquired.

Prediction: By YE 2025, 60% of sales communications providers will merge or be acquired (80% probability).

One of the key things to consider when buying an SEP is not just the ability to share content, but how well the offering works for sales learning. This puts more pressure on buyers to do critical evaluations of vendors. Aragon feels that microlearning is a critical capability for sales learning.



Figure 1: Sales enablement platforms are becoming more intelligent to help teams with productivity and overall engagement.

Some of the capabilities that make SEPs unique include:

- *Advanced content analytics.* Most providers can tell a sales representative what content is working well. In a specific deal, content analytics provides real-time analysis of what content (and what pages/slides) are being viewed. Additionally, some

providers offer analytics on voice conversations that can reveal patterns in talk time and engagement.

- *Automatic logging of calls, emails, and engagement.* While many SEP providers can automatically update the CRM regarding emails and activities, some do it better than others. Many also do not update contacts.
- *Multi-channel communications.* Engage with prospects using the right communication channel at the right time. Some providers focus on communications, including Outreach, ringDNA, Salesloft, and VanillaSoft.
- *Task automation.* This can include sending emails, automating calls, and scheduling future appointments. Automating engagement represents one of the biggest areas of opportunity.
- *Buyer Engagement.* Deal rooms allow for more personal engagement by prospective buyers. This allows the buyer to add more people from their firm into the room to explore the provider's solution and proposal.

The Need for Sales Communications and Cadences

Sales development reps and account executives need to communicate with prospects and what they do is not dissimilar from what marketers do with marketing automation platforms.

For sales communications, it is more of a personalized automated approach. Communications is critical to sales success and that means using email, chat/SMS, and phone calls in the right combination for the right account. Chat and SMS is becoming more accepted way of engaging with prospects that opt in. However, the proven way of using a dialer is still viewed as one of the hardcore approaches along with email.

In many ways, sales communications has evolved to become similar to the functionality that contact centers offer in customer support departments. It's more than just buying a dialer or omni-channel communications, it is about sales cadences and engaging people at the right time with a compelling message and, in most cases, compelling content.

Sales communications helps with automating many of the manual tasks involved in the sales process, including emails and phone calls. It is one of the things that SEP providers do well. The intersection with sales content management providers happens when it comes to playbooks and sales intelligence, which is why Aragon feels that the architecture for sales

enablement still involves sales content management and sales communications, which are on a collision course.

The Future of Sales Communications—On a Collision Course with SCM

While many vendors want to be looked at as separate and distinct in sales communications, Aragon has felt that for true enablement, communications have always been part of the formula. This Globe features providers that do content or communications, and both offer playbooks and intelligence, so there is no doubt that these providers are on a collision course for consolidation.

Proposal and Content Automation—The New Normal

It isn't just about sales content management anymore; it is all about automating the process of creating and sharing content with prospects. Speeding up the productivity of sales teams is a game changer, and more and more providers are offering these kinds of capabilities. Salespeople who can use their SEP to auto-generate proposals can save 1-2 hours of time a day.

Giving sales professionals the ability to create a proposal or a presentation that is customized for a prospect is key. Not all providers offer the ability to customize content based on the CRM data—Aragon suggests that enterprises should evaluate this capability carefully.

The Shift to Micro-Video—A TikTok-Like Experience

While prospects continue to open video content over 80% of the time, video has not caught on as well as one would expect in sales. Micro-video could change this.

Micro-video is a short-form video of a predetermined length of 30-60 seconds that allows people or an enterprise to share information. The idea is to allow information to be shared in rapid sequence on a topic or subject. For prospects, short videos would be ideal to share and then reshare with other buyers in the enterprise. Aragon feels that micro-video will be one of the biggest shifts in how people share rich content. Of the providers in this report, Allego, Bigtincan, Pitcher, and vablet offer strong video capabilities that others should look to emulate.

The Consolidation of Sales Coaching into SEPs

With all of the mergers and acquisitions that have occurred over the last four years, Aragon is declaring that sales coaching and learning is part of the SEP suite. That does not mean that there are not great standalone sales coaching and learning providers; it just means that the SEP stack of features has gotten larger. Aragon's perspective is that sales training is still an independent function from sales enablement, but it does tie to the overall need for onboarding and training.

A majority of the providers in this report offer both an SEP and a sales coaching and learning offering. Enterprises should still evaluate their sales coaching and learning needs and in many cases providers in this report will meet these needs.

Conversational Intelligence Enables Deal Coaching and Guided Selling

The ability to listen to what is said provides the ability to provide feedback to sales reps on both their skills, talk time, and how they sell. The shift to guided selling is here and it is still early days. Some providers can adapt a methodology into their platform, so that real guided selling can be deployed. Others still focus on the feedback to help improve by giving them coaching tips.

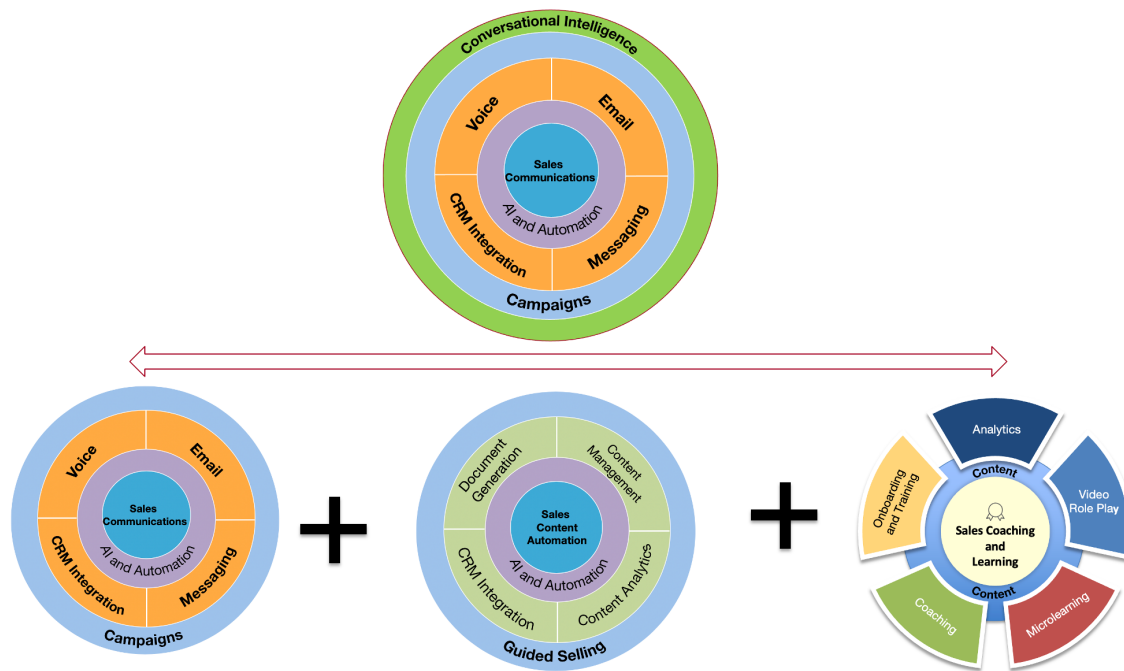
We would note that some providers offer very basic suggestions in their platform, but we don't think that it is enough. An example of lightweight recommendations is from Salesforce, which tries to tell users what to do, but in many cases, actually misses the mark.

Intelligent Sales Enablement Is Here

In 2023, while many SEP providers have added conversational intelligence to be able to analyze what is said during a sales call, there is still the need to add content AI to be able to analyze more about the how content is created and consumed (see Figure 2 below).

In the future, Aragon envisions an intelligent platform that recognizes what is happening and provides input and guidance to sales reps and managers about the right content to share, the fixed and dynamic sales playbooks, as well as guidance for reps and managers on what to do at each stage of a deal. While many providers offer basic guided selling, we see this area continuing to expand over time.

Prediction: by YE 2024, 70% of the SEP providers will add real-time AI-based intelligence to their platforms (75% probability).



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Figure 2: Sales enablement platform providers tend to focus on sales communications or sales content automation.

SEP providers have continued to innovate, particularly when it comes to adding conversational intelligence and sales coaching and learning. Even in 2023, an enterprise may buy from two providers due to the need to have both sales communications and sales content automation. Aragon feels that enterprises need to have an architecture for their overall approach to sales enablement (see Table 1).

Table 1 below summarizes the capabilities by provider.

Vendor	Sales Communications	Conversational Intelligence	Playbooks	Sales Content Mgmt. & Automation	Advanced Content Analytics	Guided Selling	Coaching and Learning
Allego		✓	✓	✓	✓	✓	✓
Bigtincan	✓	✓	✓	✓	✓	✓	✓
Conquer	✓		✓		✓	✓	
Highspot			✓	✓	✓	✓	✓
Mindtickle		✓	✓	✓	✓	✓	✓
Pitcher	✓	✓	✓	✓	✓	✓	✓
Outreach	✓	✓	✓	✓		✓	✓
Revenue Grid	✓	✓	✓	✓	✓	✓	✓
Revenue.io	✓	✓	✓			✓	
SalesHood			✓	✓	✓	✓	✓
Salesloft	✓	✓	✓			✓	✓
Seismic	✓		✓	✓	✓	✓	✓
Showpad		✓	✓	✓	✓	✓	✓
vablet			✓	✓	✓	✓	✓
VanillaSoft	✓	✓	✓				

Table 1: The summary of key capabilities by provider.

The Aragon Research Globe™ for Sales Enablement Platforms, 2023 (As of 1/12/23)

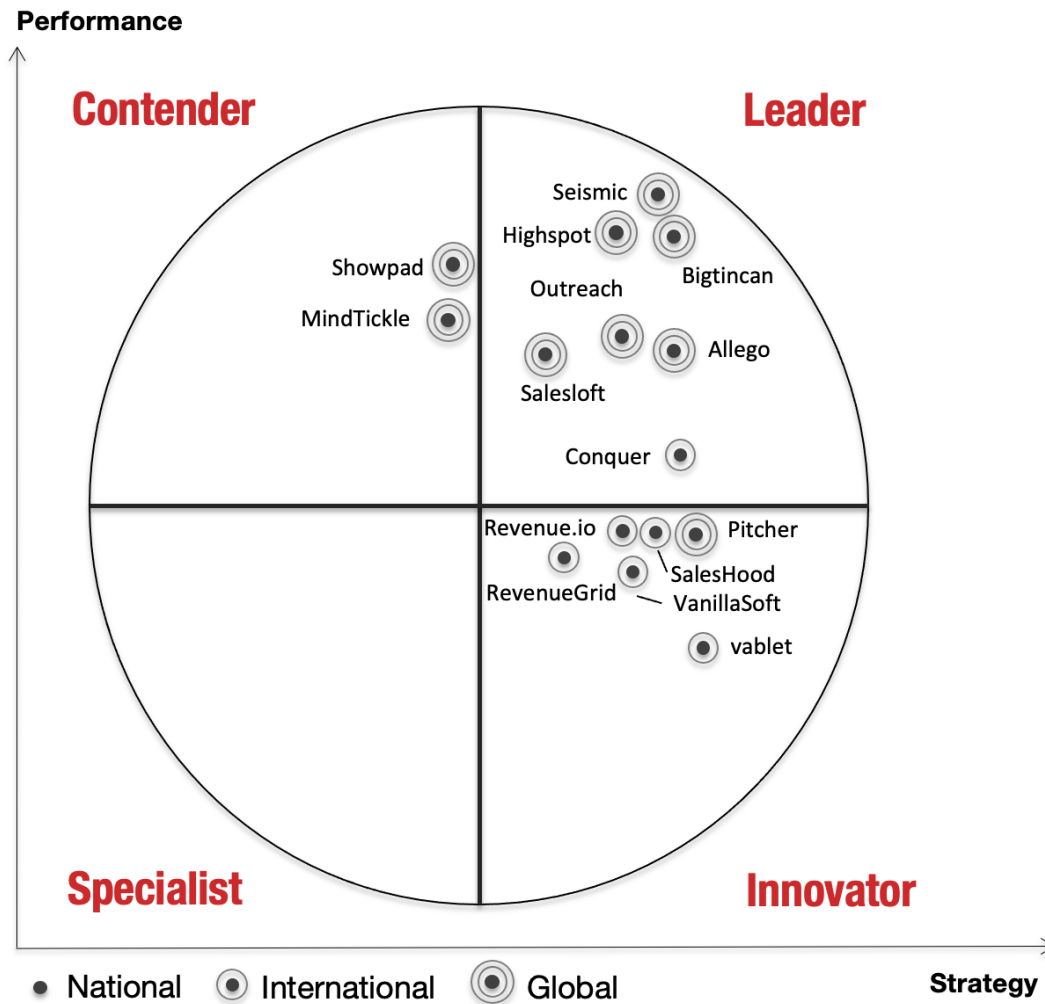


Figure 3: The Aragon Research Globe for Sales Enablement Platforms, 2023.

Leaders

Allego

Allego, based in Boston and led by CEO Yuchun Lee, offers a full sales enablement platform that has content management, video-based sales coaching, onboarding, learning, and virtual selling capabilities. In 2022, Allego also added roleplay enhancements that include AI-generated virtual actors that simulate real-world sales interactions. To drive retention and reinforcement, Allego's Flash Drills deliver personalized questions to reps' smartphones based on their learning needs.

In addition, Allego offers sales content management and Digital Sales Rooms (DSRs) with a strong set of analytics. Allego DSRs offer functionality, including personal video and live messaging, templates that can easily be customized, content engagement analytics, and a flexible security model that can open or restrict access based on email domain verification.

Allego also offers full conversation intelligence capabilities that enable reps to learn and get coaching feedback on their performance on calls. Allego Conversation Intelligence can transcribe calls across multiple languages, automate coaching alerts, and curate bite-sized call highlight reels to help managers quickly understand and improve sales behaviors and recommend content and next best actions.

Allego focuses on multiple markets, including financial services, life sciences, manufacturing, and high tech. With Allego's expanded platform that includes Conversation Intelligence, Content Management, and expanded Coaching and Learning, they are one to watch.

Strengths

- Sales content management
- Video learning
- Conversational intelligence
- Salesforce and Outlook integrations
- Content creation and sharing
- Video coaching and practice

Challenges

- Focus outside of North America

Bigtincan

Bigtincan continues to grow both organically and via acquisition. Under the leadership of Co-founder and CEO David Keane, it executed one of the largest deals in sales enablement in August 2021 when it acquired Brainshark. With that deal, Bigtincan has one of the largest install bases. Bigtincan now offers sales communications, sales content, coaching and learning, and conversational intelligence. It has three brands—Bigtincan, Brainshark, and ClearSlide, each of which has solid install bases.

Based on the May 2022 investment in relationship intelligence technology from TrustSphere, Bigtincan now provides deeper insights into accounts, including relationship maps. This will form the basis of account-based selling that few offer today.

Bigtincan offers conversational intelligence due to its acquisition of VoiceVibes, which, with relationship intelligence, positions Bigtincan well for the shift to intelligent sales enablement. The Bigtincan Hub functions seamlessly on iOS, Android, and Windows devices online or offline. Bigtincan offers even more advanced user engagement analytics from the ClearSlide acquisition. Given all the acquisitions, Bigtincan is now at 11 to date.

Bigtincan focuses on a number of vertical markets, including life sciences, financial services, manufacturing, technology/telecom, and energy, as well as B2C retail providers, including big box stores and large franchises.

Strengths

- Mobile-first sales and service content management
- Conversational intelligence
- Video sales coaching and microlearning
- Smart automation for scaling for both B2B and B2C SEP programs
- Deep content analytics and integrations
- SDK for third-party developers of “mini-apps”

Challenges

- Balancing the growing number of product lines

Conquer

Conquer, based in Reno, Nevada, and led by CEO Joshua Tillman focuses on sales communications, cadences, and guided selling. Conquer offers voice, video, email, and text communications capabilities, and it is one of the few providers that is native to Salesforce. Conquer offers a visual cadence builder that connects the following channels: inbound and outbound voice, email (Gmail and Outlook), social (LinkedIn and Facebook Messenger), and SMS texting capabilities.

In March 2021, Conquer introduced Conquer Cadence, the native Salesforce offering that includes Cadences, Workflow, Guided Selling, and support for Salesforce campaigns. Because Cadence is native in Salesforce, all activities are captured automatically. This saves significant time and also means that enterprises don't have to acquire separate activity update offerings.

One of the strengths of Conquer is its scalability, which is why large enterprises often select it. Conquer also supports inbound sales center capabilities, including advanced skill-based call routing. Conquer is winning in part due to its native application architecture and robust voice network, which is also why it can offer expanded voice capabilities such as stereo call recordings and its drag and drop integrated voice response (IVR) builder to enable more seamless inbound call flows and reduce IT dependency.

Conquer also offers guided selling capabilities, which is a key capability for enterprises to evaluate. Conquer Cadence allows reps to focus on the prospects, deals, and customers that need attention first. Reps are prompted with next best steps, open touchpoints, call scripts, and field updates specific to the sales process defined inside CRM. Conquer also can make sure that a rep does not over-communicate or spam a prospect, via its configurable compliance tools.

Strengths

- Sales communications
- Native Salesforce application
- Predictive analytics
- Native dashboards and reports
- Auto updating of accounts and opportunities

Challenges

- Market awareness outside of the U.S.

Highspot

Highspot, based in Seattle and led by Founder and CEO Robert Wahbe, raised a \$248 Million F round in January 2022. Highspot offers a complete SEP offering that includes sales content management, playbooks, guided selling, and sales coaching and learning. It features an intuitive user interface and seamless integrations, including Office 365 and G-Suite, which enable native and on-the-fly editing of documents.

Highspot focuses on its SmartPage technology, which is about making content more contextual. It also offers suggestions to sales reps about their content. Highspot makes it easy to tailor its user interface for different teams and allows the right news to be surfaced to keep those teams up to date. In January 2022, Highspot announced a series of updates to provide enhanced engagement analytics, updated content scorecards, and bulk actions.

In June 2022, Highspot announced its new content governance policy capabilities that help keep content fresh and relevant. This makes it ideal in a number of industries and also can ensure that sales reps are following sales playbooks.

Strengths

- Analytics
- Content management
- Salesforce integration
- Office 365 and G-Suite integration
- Automated document generation
- Sales coaching and learning partners
- Customer success and services

Challenges

- Awareness outside of U.S.

Outreach

Outreach, based in Seattle and led by CEO Manny Medina, has continued to focus on growth with some large deals. Outreach focuses on sales communications and offers Outreach Engage, Outreach Guide, and Outreach Commit, along with its intelligence capabilities.

Outreach Sequence leverages a series of touch points to help reps connect with buyers. Outreach Guide helps generate sales plans, offers AI-generated insights, and helps to track deal progress. In August 2022, Outreach announced a series of enhancements including enhancements to Kaia Conversational Intelligence, deal health scores, forecasts, and enhanced reporting capabilities.

Outreach has also been expanding its European presence. In June 2022, Outreach announced new data center options in Dublin, Ireland, powered by Amazon Web services.

Strengths

- Sales communications
- Digital assistant
- Conversational Intelligence
- Voice, email, and SMS capabilities
- Predictive analytics including intent
- Automation and sequencing of sales activities
- Sales coaching

Challenges

- Content management capabilities

Salesloft

Salesloft continues its growth trajectory under CEO Kyle Porter, who also added a new CMO Lauren Vaccarello, in 2022. Salesloft received an undisclosed investment by Vista Equity in December 2021. The deal makes Vista the largest investor in Salesloft today.

The firm focuses primarily on sales engagement and intelligence. The Salesloft Platform includes sales communications, conversational intelligence, analytics, guided selling, deal management, pipeline management, and sales coaching. In 2022, Salesloft announced its new Forecast offering, which overlaps with Forecasting Modules in existing CRM offerings.

Salesloft helped to pioneer sales cadence capabilities with its cadence frameworks. It also integrates with industry-leading CRMs (Salesforce, MS Dynamics, and HubSpot), eliminating the need for revenue team members to manually enter data. In 2022, Salesloft also announced native CRM Integrations with Hubspot and Microsoft Dynamics, as well as real-time reporting on rep activities—embedded into Salesloft team and cadence performance. These tools are also integrated into CRM or APIs to export into data intelligence platforms and can connect activities with revenue outcomes.

Due to its growing partner Integrations, Salesloft now has a marketplace with over 200 third-party integrations, including Slack, LinkedIn, G-suite, Microsoft Outlook, CRM (Salesforce, MS Dynamics, HubSpot), and video providers (Vidyard, VidGrid, Videolicious.) Salesloft has a growing presence in North America and EMEA. In June 2022 it announced new offices in Singapore to continue expansion into the Asia Pacific region.

Strengths

- Ease of use
- Sales communications
- Conversational Intelligence
- Partner ecosystem
- Sales cadences

Challenges

- Market awareness outside of North America, EMEA, and APAC

Seismic

Seismic, led by Founder and CEO Doug Winter, has continued its strong growth and now touts an annual revenue run rate of \$300M. Seismic offers a full sales enablement platform that includes sales content management, sales coaching and learning, and intelligence.

On April 2022, it announced the Enablement Cloud. This update provides strategy planning, content management, coaching and learning, engagement, content automation, intelligence, social selling, and integrations. The Seismic Platform also offers rich content experiences that include Smart Plays, dynamic email templates, and new global privacy management. Seismic also offers immersive, choose-your-own-adventure style presentations that allow the audience to drive the conversation.

Seismic is fully integrated into Salesforce and also works seamlessly with Slack and email clients. In October 2022, Seismic announced that it is partnering with Cisco and integrating Seismic with Cisco Webex Meetings.

Seismic continues to offer native content automation with its LiveDocs functionality that enables documents to be customized for prospects and clients on-the-fly. This eliminates the need for a separate CA or Configure Price Quote (CPQ) offering. Given its run rate, we expect Seismic to IPO in late 2023.

Strengths

- Automated content assembly
- Install base
- Analytics
- Content management
- Content automation
- Content discoverability
- Customer success initiatives

Challenges

- Awareness in APAC

Contenders

Mindtickle

Mindtickle, based in San Francisco and led by CEO Krishna Depura raised its second major \$100M funding round in August 2021, putting its total funding at \$281M. With a strong heritage in sales coaching and learning, Mindtickle expanded into sales content management in 2021. Its sales content management offering is called Asset Hub. The Mindtickle platform now includes sales content management, onboarding, training, microlearning, and role plays. It also provides conversational intelligence with its Call AI offering. In the area of coaching, Mindtickle continues to offer its coaching framework, which includes role-specific competency maps to enable personalization of learning paths and coaching.

Mindtickle Asset Hub allows access to both training content and customer-facing content. Sales content can be organized into Hubs for easy access. Mindtickle also allows for the ability to create an Ideal Rep Profile to set the benchmarks for ideal rep behaviors and revenue performance and then track gaps against those benchmarks.

Mindtickle also enables teams to compete via leaderboards and other gamification techniques. Mindtickle offers advanced analytics so that sales leaders know which teams and individuals they need to focus on. Mindtickle integrates with sales enablement, HR, content management, and CRM platforms.

Strengths

- Platform approach and single data model
- Competency-driven coaching framework for reps and managers
- Robust integrations to CRM, SE, LMS, and HR platforms
- AI-based analytics
- Smart role-plays with AI feedback
- Micro-learning with native content creation capabilities, social gamification, and spaced reinforcement

Challenges

- Awareness outside of the U.S.

Showpad

Showpad announced Hendrik Isebaert as its new CEO in 2022. It continues to lead with three core offerings: Showpad Content, Showpad Coach, and Showpad video. Showpad Coach supports learning. Showpad also integrates with Salesforce CRM, Adobe Marketo, and Email.

In November 2022, Showpad announced its Showpad Enablement Operating System (eOS). Showpad eOS offers content management, seller effectiveness, buyer engagement, and analytics and insight. Showpad also offers its conversational intelligence offering that allows reps and managers to gain insights on conversations during calls.

Showpad Content also includes Showpad Shared Spaces, which allows for buyers to visit a secure, branded micro-site for viewing all the content associated with that account. Showpad Content has built-in AI-based content recommendations so the right content can be shared at the right time.

Showpad also allows for the creation of custom home pages, accelerated course creation, enabled shareable video meeting 'snippets,' added greater augmented reality and VR support, and added enhancements to customize search options. Showpad is also optimized for web or mobile device access and historically has offered a strong mobile-first experience for salespeople on the go. Along with its strengths in content creation and the ability to update content for everyone, Showpad integrates CRM systems such as Salesforce and Microsoft Dynamics, which can increase sales rep productivity.

Strengths

- Mobile experience
- Content analytics
- Content sharing
- Salesforce integration
- User interface
- Interactive buyer experiences

Challenges

- Balancing focus on sales enablement and training

Innovators

Pitcher

Pitcher based in Zurich, and led by CEO Mert Yentur, continues to focus on sales enablement. In May 2022, it took an undisclosed round of funding from Crest Rock Partners. The Pitcher Super App offers sales content management and automation, multi-channel engagement, guided selling order and sample management, as well as coaching and analytics.

Pitcher markets is offered as a Super App for sales enablement. Pitcher has a history of mobile first capabilities, driven in part to the need for sales reps on the go to be able to access Pitcher on mobile devices, including support for Apple iOS, Google Android, SAP and Microsoft Windows. One of the popular features of Pitcher for Sales Reps is the ability to do route planning, as well as the ability to work offline with content, which is important for reps in the field.

Pitcher has System Integrator (SI) relationships with Accenture and Deloitte. Some of the SI deals probably are related to its ongoing campaign to try to replace Veeva Systems in Life Sciences Accounts.

Via its Super App, Pitcher is providing a complete work hub for sales reps—ranging from offline CRM access to dynamically adapted presentations, from order capture to coaching, and remote presentations. Pitcher continues to grow based on industries, which includes consumer goods, manufacturing, and financial services.

Strengths

- Ease of use
- Mobile-first application
- Off-line functionality
- Life sciences expertise
- Sales coaching and learning
- eDetailing
- Task and activity management

Challenges

- Market awareness in U.S.

Revenue Grid

Revenue Grid is a full-stack sales execution platform which offers data capturing, sales enablement, revenue intelligence, and forecasting, covering the entire sales cycle, from prospecting to deal management to forecasting to helping to fix revenue leakage.

The Revenue Grid sales enablement solution includes Sales cadences, sales communications, content management, and analytics. Guided selling from Revenue Grid starts from pipeline health check with AI scoring that includes intuitive dashboards that provide real-time visibility of the progress and status of each deal.

The Revenue Grid platform then guides reps through each deal with automated AI and ML insights, reminders, and alerts called “Signals” that automate playbooks, suggest next steps, deliver coaching from sales managers, and alert sellers to any problems that need immediate attention. As sellers close deals, analytics for team performance and engagement help sales leaders identify and scale the most effective sales activities.

Revenue Grid offers integrations with Microsoft Teams, Dynamics, Outlook, and Teams. They also work with Google Gmail and Salesforce. Its growing number of integrations and automatic data collection mean that it uses far more reliable data to drive its intelligence and can respond to the sales process in real time.

In March 2022, Revenue Grid announced new features, including the ability to create and assign signals from the Microsoft Teams Bot and a daily digest of active and inactive sales sequences. New revenue reports also became available in the Summer 2022 release.

Strengths

- Real-time guided selling
- AI-based revenue intelligence
- Contextual coaching
- Dashboards and reports
- Sales communications
- Install base with OEM partners
- CRM Integrations

Challenges

- Market awareness

Revenue.io

Revenue.io (formerly RingDNA) empowers sellers with real-time conversation guidance across voice, video, and web meetings to help sales reps do and say the right things to engage buyers and move existing deals forward. Revenue.io leverages not only what is said, but also what is not said during a conversation to prescribe live guidance and next best actions before, during and after every engagement.

Revenue.io arrives with out-of-the-box sales objection handling, behavioral etiquette guidance, and content type recommendations based on the most effective usage across its platform.

The platform's built-in sales cadence solution, Guided Selling, makes it ideal for sales teams to know who to reach out to and what they should be discussing. Part of the success of Guided Selling is also due to the auto activity logging. Revenue.io offers a number of pre-packaged offerings that include Professional, Pro Plus, and Elite offerings.

Sales CRM and Collaboration Integrations include Dun & Bradstreet, Google Gmail, Microsoft Teams and Outlook, Salesforce, Zoominfo, Twilio, Zoom and others

Strengths

- Intelligent dialer
- Sales playbooks and sequences
- AI /conversation intelligence
- Task management
- Sales coaching
- Automatic content conversion engine

Challenges

- Market awareness outside of the U.S.

SalesHood

SalesHood, based in San Francisco, and led by CEO Elay Cohen and CTO Arthur Do expanded its management team in 2022, adding Josh Cruickshank as CSO, Brett McBee-Wise as VP of Product, and Michele Dotterer at VP Strategic Accounts. SalesHood offers all-in-one sales enablement platform, with strong capabilities in sales coaching and learning. The SalesHood platform offers branded document and video content delivery, just-in-time learning, prescriptive coaching, guided selling, and performance correlations. In addition to modern learning, SalesHood also offers Buyer Sites to allow enterprises to engage their customers and prospects at their own pace.

In November 2022, SalesHood enhanced its platform with new features that includes Customized Pages, Guided Selling, Sales Play activation, Buyer Insights, and enhanced Buyer Sites. SalesHood is also leveraging an approach called Peer2Peer that focuses on best practices among sales teams. The focus is on use case storytelling, pitch practice, and skills coaching. Customers have seen success using this Peer2Peer approach.

SalesHood offers turn-key sales training in its library including MEDDPICC, Selling Through Curiosity, and Winning By Design. SalesHood also focuses on front-line manager enablement with coaching templates and Pitch AI to streamline remote sales coaching. SalesHood also offers guided selling in Salesforce and Microsoft.

Strengths

- All-in-one sales enablement platform
- Modern training and onboarding
- Front-line manager workflow and data for coaching
- Integrations with Salesforce
- Fast and easy deployments

Challenges

- Market awareness

vablet

vablet focuses on sales enablement with a particular expertise around content management and mobile delivery. In 2021 vablet added sales coaching and learning to its portfolio. vablet provides advanced content management features, including the ability to push new content to devices with full tracking capabilities and full offline access. A major plus is the native integrations with cloud content management providers, such as Box, Dropbox, Google Drive, Microsoft SharePoint, Hyland OnBase, and Oracle PLM. vablet is also natively integrated with Salesforce.

vablet is winning in industries where mobility is important for salespeople on the go. Part of this is because vablet can be deployed on any device, including Apple iOS devices, Microsoft Windows, Windows PC, and Surface tablets, and browsers. vablet excels at content sharing, particularly media such as video or interactive presentations. vablet also includes strong forms capabilities, making it ideal for kiosks and other self-serve applications.

vablet's form building tool also makes it ideal for data capture for reps on-the-go. Its fillable forms can be used in the field, offline, in kiosks, or in other self-service applications. vablet's extensive content capabilities, including rich media and video, along with offline access to that content, are one of the reasons it is winning new customers. Because of its strong mobility and content management capabilities, vablet is winning customers in life sciences, financial services, and medical devices.

Strengths

- Content management
- Video support and expertise in handling video
- Document and video analytics
- Extensive Salesforce integration
- Optimized for mobile devices
- Sales coaching and learning
- Integrations

Challenges

- Market awareness

VanillaSoft

VanillaSoft, led by CEO David Hood, offers a sales enablement platform with a specific focus on sales communications. Its platform has been expanding and now includes autodialing, scripting, appointment setting, lead routing, and omnichannel communications (voice, email, and SMS messaging). The growth of team collaboration and comfort level with messaging positions VanillaSoft well, as it has been offering mobile messaging for several years.

Its Autoklose offering includes email campaign management, email sequences, and sales intelligence data. Additionally, VanillaSoft's scripting tool allows a sales rep or agent to adapt the conversation on the fly, which will help both new and experienced sales reps.

VanillaSoft's appointment setting capability, which includes proximity booking, can help to maximize the appointment setting and scheduling process. VanillaSoft focuses on inside sales, higher education fundraising, hospitality, insurance, banking, and finance. For SMBs, VanillaSoft's built-in CRM can save time and money. That said it now offers integrations with Salesforce CRM.

Strengths

- High-volume outbound calling
- Email and text messaging
- CRM capabilities
- Salesforce integration
- Activity and voice analytics
- Mobile support

Challenges

- Market awareness

Getting Started with Sales Enablement

Sales enablement platforms have evolved to become the go to work hub for sales reps and their managers. The content sharing, cadences, conversational intelligence, and guided selling insights that SEPs deliver to sales teams and managers help them to make decisions on the deals that they want to spend time on. Product offers are all different, and careful due diligence is needed to ensure that the right platform is selected based on needs.

SEPs are basically part of the sales tech stack that has emerged. Enterprises that do not leverage an SEP face significant disadvantages over those that do.

Aragon Advisory

- Enterprises should look at sales enablement platforms and now should look at their coaching and learning functionality. This market has also become a replacement market so switching vendors is not that hard to do.
- Sales intelligence is here. Roadmaps are vital to understanding where a vendor is taking their platform relative to intelligence.
- Mobile sales enablement is not going away. A growing number of providers in this report operate very well on a tablet device. Enterprises should test the mobile functionality that a provider offers.

Bottom Line

Sales enablement platforms have expanded their footprint, and now learning and conversational intelligence are a core part of most offerings. With SEPs becoming intelligent, sales teams can be more productive and more adaptive, based on the feedback derived from client interactions. With the world still working in a hybrid mode, SEPs are a vital part of the sales tech stack.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer experience:** Feedback on the product, installs, upgrades and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?
- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international* or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

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- **Americas** (North America and Latin America)
 - **EMEA** (Europe, Middle East and Africa)
 - **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators* or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives, but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well, but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

Sales enablement platforms are poised to become the digital selling toolset for the sales organization.

- A minimum of \$3 million in primary revenue for sales enablement (sales content management, analytics, communications, and other features for digital selling)
- Or a minimum of \$10 million in revenue in a related market (collaboration, content management, or portal/UX software).
- Shipping product. Product must be announced and available.

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process. This

determination was applied to Journey Sales, who declined to participate in the Aragon Research Globe process.

Noteworthy Vendors Not Included In this Report:

The following vendors were not included in the report but are notable:

- *DealHub*
- *Journey Sales*
- *OneMob*
- *Regalix*
- *Zoomifier*