The Aragon Research Globe™ for Sales Enablement Platforms, 2024

The Rise of Intelligent Sales Assistants

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Topic: Sales enablement

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

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SUMMARY

Aragon's fifth Aragon Research Globe™ for sales enablement platforms examines 16 major providers in a market category where Generative AI and LLMs will help to power new Intelligent Sales Assistants that will help Sales teams get their work done faster by automating many of their daily tasks around content and communications with prospects and customers.

Key Finding:

Prediction: by YE 2025, 65% of the SEP providers will intelligent sales assistants to their platform (70% probability).

Prediction: By YE 2024, 70% of Sales Enablement providers will use third party LLMs that they train on their own product and service information (80% probability).

Prediction: BY YE 2025, 75% of the capabilities provided by Sales Communications providers will be offered by Intelligent Sales Assistants (70% probability).

Prediction: By YE 2026, due to the Rise of Intelligent Sales Assistants 60% of sales communications providers will merge or be acquired (70% probability).

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Introduction

The Sales Enablement market continues to evolve and change, as more providers continue to innovate. With Generative AI powering up a new conversational Interface, Intelligent Sales Assistants are arriving on scene. These Assistants will enable more automation including generating content and sending emails. This means that sales content management and sales communication are on a collision course, as Intelligent Assistants will now be able to do more of this work. This sixth Aragon Globe report evaluates 16 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. The big changes over the last 24 months has been the addition of Learning into the stack but now—Intelligent Sales Assistants are poised to change this market more than anything in the last six years. Innovation will drive consolidation of the market.

Intelligent Sales Enablement Gets Stronger

The new race in Sales Enablement is intelligence powered by Generative AI. Writing emails is now one of the battle cry—as is offering better Sales Coaching. So with the rise of GenAI, we see this market on more of a automation path than ever before. The idea of a Sales Assistant that can handle many of the tasks for a sales rep – including cadences and content generation – is not far from being a reality. 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).

Intelligent Sales Enablement is all about custom and dynamic sales playbooks, call summaries, call coaching and adapting content for the right decision maker in a deal. 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 2025, 65% of the SEP providers will intelligent sales assistants to their platform (70% probability).*

Intelligent Sales Assistants Are Here

The race to Sales Intelligent Assistants is here, powered by Generative AI and the Content AI algorithms they power. This race started a few years ago when Cisco added its Webex Assistant. Since the rise of Large Language Models (LLMs) in 2022, a new race has emerged that will change the way that users interact with calls, meetings, and chat. This year a number of SEP providers have added new intelligence capabilities, including Bigtincan, Mediafly, Seismic, Salesloft, Saleshood, and others. (see Table 1)

Intelligent Digital Assistants will do more for users by taking notes, action items, summarizing meetings and calls and even splitting recordings into chapters. Intelligent Assistants can also compose emails Intelligent Assistants are powered by Generative AI and Large Language Models (LLMs).

The things that Intelligent Sales Assistants will be able to do:

- *Compose email and chat messages*

- *Generate Documents*

- *Send emails, including bulk*

- *Offer Coaching during or after a call.*

Generative AI and LLMs Will Power Intelligent Assistants

Generative AI platforms, such as OpenAI's ChatGPT, are a general-purpose interface for the GPT family of large language model AI systems. Copilots are one specific use case where *existing* applications are enhanced through the use of an AI model (e.g., ChatGPT, PaLM2, or others) for a specific domain-driven large language model application. This year saw the launch of CoPilot offerings for both Microsoft Office 365 and Google Workspace Duet. These are focused on writing and summarizing information.

ChatGPT put generative AI on the map, demonstrating to business leaders that AI can support many of the business-critical tasks performed in the enterprise every day. It includes a pre-trained machine learning model, a neural network design running on cloud services, and development interfaces to utilize the model. ChatGPT is also available for custom training for specific use cases. Use cases have exploded, and we expect many AI-enabled products built on this technology to arrive in the near future.

Large Language Models (LLMs) allows users to communicate with generative AI model as if it were a virtual assistant. It is highly effective at a wide variety of business tasks.

Whether it is generating copy for marketing or sales, producing boilerplate code or unit tests for a developer, filtering and interpreting data, summarizing documentation, or chatting directly with users for customer support, Generative AI is a highly competent general agent for the enterprise as a stand-alone product.

It is important to note that Generative AI still needs a set of foundational algorithms that can read and understand documents, voice (live and recordings) images and video (computer vision). These algorithms are what Aragon calls Content AI (see Figure 2 and Note 1).

Prediction: *By YE 2024, 70% of Sales Enablement providers will use third-party LLMs that they train on their own product and service information (80% probability).*

SEP, CRM, and the Growing Sales Tech Stack

In some cases, CRM platforms have become bloated and that has enticed some sales Enablement providers to mimic CRM features, such as opportunities and forecasts. With AI now front and center, it is clear that Sales Enablement is still about helping Reps get work done and now the process of doing that has become easier with the rise of Intelligent Sales Assistants.

While there is overlap, Aragon feels there can only one system of record for Sales Accounts and Sales Deals. It is still the CRM that does this.

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.

Note 1: Content AI as part of Generative AI
Content AI has been around for several years, and refers to the ability to process and understand different types of Content. This includes:

Voice AI: The ability to listen to a voice call and understand key words or phrases or the entire conversation. This has been referred to as Conversational Intelligence.

Document AI: The ability to read and understand documents is foundational. With a generative layer added to Document AI, suggestions can be made to enhance an existing document or even to create a new one

Image and Video (Computer Vision):

Image and Video AI is referred to as Computer Vision. This is the ability to identify Images and Scenes. A fair amount of training is needed to train models.

However, the ability to summarize a meeting by referring to a specific scene or even generating a video summary using specific scenes is now an emerging capability.

With GenAI added to the mix, new images and videos can be created. However, careful consideration to copywrite and IP rights needs to be understood before using such images in a commercial setting.

Sales Enablement Platform Market Overview

The promise of true Sales Assistants is here with the rise of the Intelligent Sales Assistant. This capability will help providers with product feature creep, and it will help sales teams. If there is anything that the rise of Sales Assistants will drive—it is further consolidation. Aragon has always felt that the segmentation of Sales Content Management and Sales Communication was only temporary*)*.

Intelligent Sales Assistants will compete with horizontal tools such as Microsoft CoPilot for Office and Google Duet for Google Workspace, but they will be all about the sales role and be trained more specifically in content in email composition and deal coaching. The question that remains is whether enterprises are willing to pay for an intelligent sales assistant.

However, if an Intelligent Sales Assistant can make Sales Reps and SDRs more productive the cost will be justified. However, Intelligent Sales Assistants will also be offered by CRM Providers. To date, only Unlimited Edition Customers of Salesforce are eligible for their ISA.

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.

Now it is clear that emails and cadences using playbooks—that can all be done with the properly configured and trained Intelligent Sales Assistant. This will take time to be able to fully automate all of the cadences a Sales Rep does but it Is clear that Intelligent Sales Assistants will be able to do many of these repetitive tasks.

Prediction: *BY YE 2025, 75% of the capabilities provided by Sales Communications providers will be offered by Intelligent Sales Assistants (70% probability).*

Sales Content Automation—The New Normal

The new capability that has arrived and is here now is the ability for Sales Assistants to help draft sales emails – and to do it at a high-quality level. This is one of the most challenging areas for sales reps and now highly tailored sales emails can help all salespeople grab attention.

Proposal generation is still going to be more focus on leveraging rules to pre-populate templates. We expect that more organic Generative AI content generation to come online in 2024. But in the meantime, speeding up the productivity of sales teams by using content automation is a call to action for sales teams. Salespeople who can use their SEP to auto-generate proposals can save 1-2 hours of time a day.

The challenge for sales teams is to embrace content automation. It is important to note that not all providers offer the ability to customize content based on the CRM data—Aragon suggests that enterprises should evaluate this capability carefully.

The SEP Playbook: Content, Communications, and Learning and AI

Today, many enterprises can get both sales content management and sales coaching and learning from one provider. With Intelligent Sales Assistants, there is a higher probability that Sales Reps can get the help they need with either the Content to use at a particular sales stage—or the right cadence to use or both.

This means that Sales Content Management and Sales Cadences are on a collision course and as a result—there will be more market consolidation. More providers will merge or be acquired—either due to feature overlap or the failure to invest in AI.

Note 2: 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

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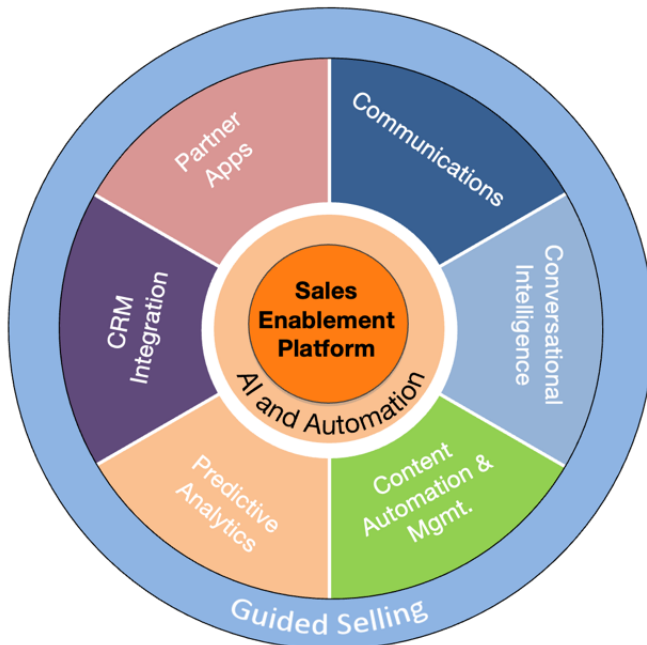
Figure 1: Sales enablement platforms are becoming more intelligent to help teams with productivity and overall engagement.

Sales Communications and Cadences—Automation and AI

For sales communications and cadences, automation has always been the goal and now with AI, intelligent automation is here. 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.

The rise of Intelligent Sales Assistants will enable a new level of automation. It may force some SEP providers to update their offering (note many are in the process of doing this). Overtime,

Intelligent Sales Assistants will be capable of engage many of the cadences that Sales communications tools do now, but with higher levels of intelligent automation.

This makes the idea of one platform for all of Sale's enablement a reality. There will still need to be human involvement, but the challenge is that Sales Content Management providers will be able to launch Intelligent Sales Assistants that do communications and cadences.

Prediction: By YE 2026, due to the Rise of Intelligent Sales Assistants 60% of sales communications providers will merge or be acquired (70% probability).

Intelligent Sales Assistants and Deal Coaching and Guided Selling

Intelligent Sales Assistants, when combined with Real-time Conversational AI—will have the ability to listen and coach in real-time. This is what we refer to as Enterprise Coaching and not all SEP providers are focusing on 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.

On Coaching, some providers offer very basic guidance—that will not be enough in the Intelligent Sales Assistant era. Enterprises should carefully evaluate roadmaps from SEP providers to determine how invested they plan to be with Deal coaching and Guided Selling.
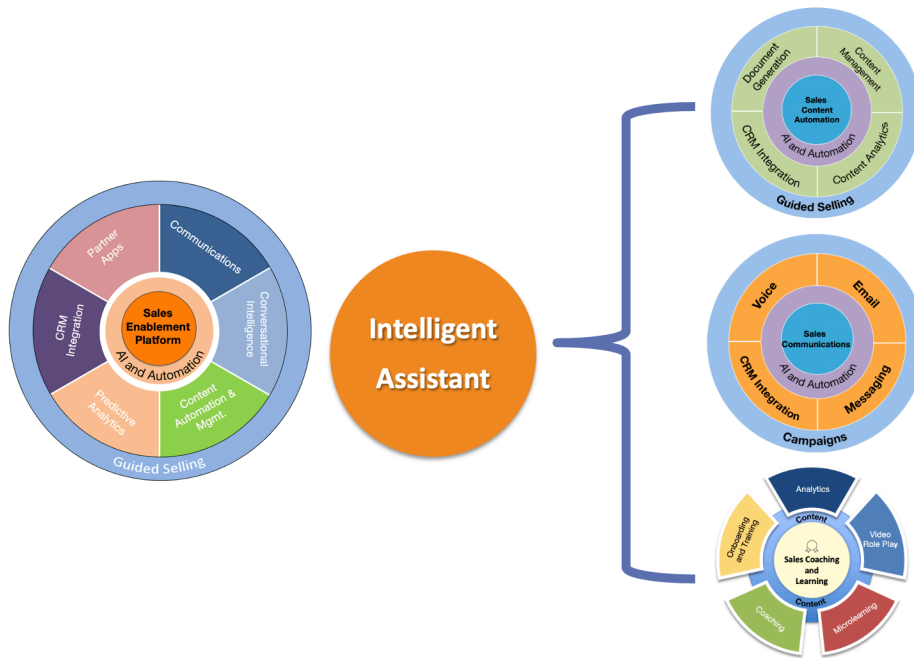
Figure 2: Sales enablement platform providers are investing in Intelligent Sales Assistants.

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	Intelligent Sales Assistant	Playbooks	Sales Content Mgmt. & Automation	Advanced Content Analytics	Guided Selling	Coaching and Learning
Allego			✓	✓	✓	✓	✓
Bigtincan	✓	✓	✓	✓	✓	✓	✓
Conquer	✓		✓		✓	✓	
Highspot		✓	✓	✓	✓	✓	✓
Mediafly		✓	✓	✓	✓	✓	✓
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, 2024
(As of 2/1/24)
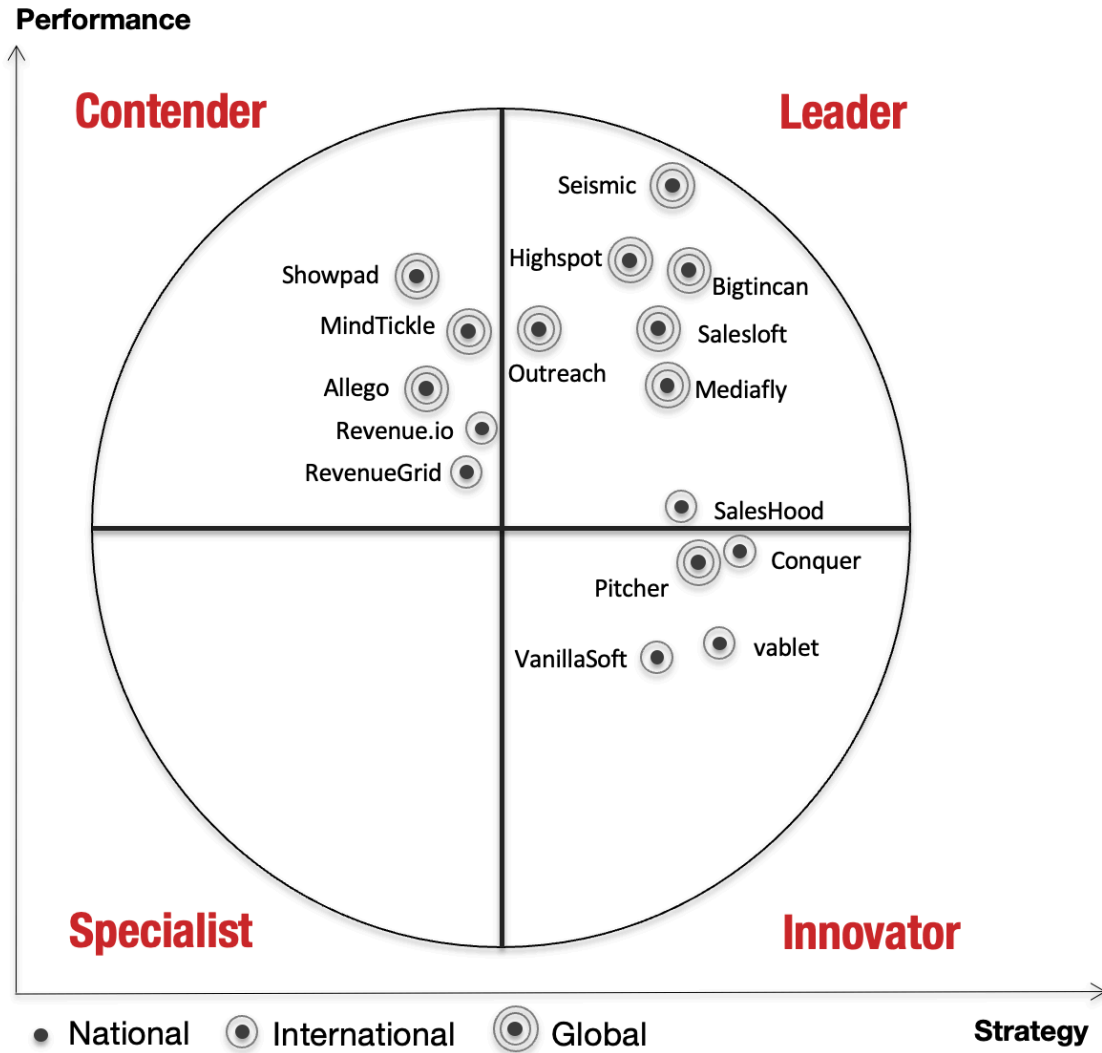
Figure 3: The Aragon Research Globe for Sales Enablement Platforms, 2024.

Leaders

Bigtincan

Bigtincan is based in Boston led by CEO David Keane. Bigtincan focuses on Sales Enablement and Coaching. While Bigtincan has grown via acquisition, it has also grown organically. Bigtincan now offers a full sales enablement platform that includes communications, sales content, coaching and learning, and its GenieAI intelligent assistant.

Bigtincan offers three brands—Bigtincan, Brainshark, and ClearSlide, each of which has solid install bases. In March 2023, Bigtincan introduced Bigtincan GenieAI™, its LLM-powered personal assistant that can help with content generation as well as learning and coaching. The new GenieAI capabilities will also help reps to get summaries of interactions.

Bigtincan offers both Learning and its updated Coaching application, which is powered by its VoiceVibes Conversational Intelligence acquisition. The Coaching solution helps with Sales onboarding including practice sessions, call review sessions, and active coaching. Some of the feedback that can be given to a rep includes tone-of-voice analysis such as enthusiasm, confidence, and clarity. For Managers, Bigtincan allows the creation of Coaching assignments based on the feedback the manager sees from Bigtincan GenieAI. Coaching Assignments include role plays that may involve specific scenarios. Because Bigtincan offers live meetings, it can record the interactions with customers and leverage Zoom, Cisco, and Microsoft Teams.

Bigtincan focuses on several 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. With its early investments in AI, Bigtincan is prepared to take advantage of the growing demand for AI and the automation that comes with it.

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

Highspot

Highspot, led by CEO Robert Wahbe, appointed Graham Younger as President of Field Operations in June 2023. Highspot is still leveraging its $248 Million F round from 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.

In May 2023, Highspot announced its Spring 23 release that includes new Generative AI capabilities for Sales enablement, along with updates to its Coaching and Learning offering. In April 2023, Highspot announced Highspot University to help customers take advantage of its growing product line.

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. For Sales Communication and cadences, Highspot continues to partner with Salesloft.

Highspot has been expanding internationally. In 2022, it expanded into Vancouver Canada and in 2023 they opened their India office.

Highspot continues to offer its content governance policy capabilities that help keep content fresh and relevant. Governance, along with its new Generative AI capabilities, positions Highspot for the growing demand to automate emails and the generation of custom playbooks and customer-focused content.

Strengths	**Challenges**
• Analytics	• Awareness outside of U.S.
• Content management	
• Salesforce integration	
• Office 365 and G-Suite integration	
• Automated document generation	
• Sales coaching and learning partners	
• Customer success and services	

Mediafly

Mediafly, based in Chicago and led by Founder and Co-CEO Carson Conant and Co-CEO Mary Shea, has been growing its presence in the overall Sales Enablement market over the last few years. In August 2023, Mediafly announced that it raised $80 Million in new funding led by BIP Ventures and Boathouse Capital. In November, Mediafly announced its enhanced Value Experience, integrating its value selling, enablement, and analytics tools into a single hub. Additionally, Mediafly is the only Sales Enablement provider to be recognized as an "SAP-Endorsed Application."

The Mediafly portfolio includes its flagship Revenue 360 Platform. The modules that Mediafly offers include Sales Content Management, Revenue Enablement and Intelligence Sales Readiness, Digital Sales Rooms, and Sales Coaching. The Mediafly Enterprise Revenue Intelligence capabilities, introduced in 2022, include features to improve productivity and win rates. They include, Deal Inspection, Call Plans and Coaching Accountability, Sales Rep Performance Management, and Forecasting.

One of the capabilities that is helping Mediafly to win new customers is its ability to personalize the buying experience via its customizable Digital sales rooms and its overall approach to immersive Content. Mediafly focuses its go-to-market efforts in Consumer-Packaged Goods, Financial Services, Life Sciences Manufacturing, Media & Entertainment, and Technology. With $80 Million in new investment, Mediafly is well-positioned for the future.

Strengths	**Challenges**

- Sales Content Management
- Personalized Deal Rooms
- Sales Coaching
- Revenue Intelligence
- SDK for third-party developers of "mini-apps"

- Market awareness outside of North America

Outreach

Outreach, led by CEO Manny Medina, announced Abhijit Mihtra as President of Product and Technology. Outreach offers its Sales AI platform that it has been enhancing over the last year. Outreach has product offerings in Outreach Engage, Outreach Guide, and Outreach Commit.

At its Outreach event in October 2023, Outreach announced AI Assist, its new Intelligent Assistant. AI Assist will include Smart Meeting Assist for summarizing meetings, Smart Deal Assist to identify risk in opportunities, and Smart Sequence Assist for offering custom sequences based on a prospect's persona.

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. Outreach offers deal health scores, forecasts, and enhanced reporting capabilities as part of its AI offering.

In October 2023, Outreach announced that it is now a native integration with Cisco Webex Meetings. It is also now offering its new Marketplace and Developer Portal. The new Marketplace will allow third-party apps such as Cisco, Hubspot, and Demandbase to be enabled with minimal admin involvement. Outreach is now available in the Microsoft Azure marketplace.

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<tr><td align="center"><u>**Strengths**</u></td><td align="center"><u>**Challenges**</u></td></tr>
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- Sales communications
- Cadences
- AI Assistant
- Voice, email, and SMS capabilities
- Predictive analytics including intent
- Automation and sequencing of sales activities
- Sales coaching

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- Content management capabilities

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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 SVP of Product. SalesHood is a purpose-built sales enablement solution using AI to replicate top performers by achieving breakthroughs in sales effectiveness, execution, and readiness. SalesHood has 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 digital Client Sites to allow enterprises to engage their customers and prospects at their own pace. Their customers are realizing dramatic lifts in pipeline conversions, win rates, and deal sizes with Client Sites.

SalesHood released AI Coach in 2022 providing Customer-facing teams with real-time and AI generated feedback on tone, duration, speed, key phrases mentioned and restricted phrases avoided. AI Coach also offers summary recommendations that are presented in real-time with graphical and text-based qualitative and quantitative feedback. AI coach provides front-line managers with valuable messaging and sales process insights on their team's performance, guiding them to have data-driven coaching conversations.

SalesHood offers turn-key sales skills training and sales coaching templates in its library including SalesHoodIQ, MEDDICC, Revenue Academy by Winning By Design and Selling Through Curiosity. SalesHood focuses on front-line manager enablement with coaching templates and AI Coach to streamline remote and real-time sales coaching. SalesHood also offers guided selling in Salesforce and Microsoft.

Over the past 12 months, SalesHood enhanced its platform with new features that include major updates to its sales content solution, Integration marketplace, Salesforce CRM Insights, buyer engagement insights, AI Coach, custom generative AI prompts for coaching anything, and customized Pages. SalesHood is also leveraging an approach called Peer2Peer that focuses on best practice sharing among revenue teams. The focus is on use case storytelling, pitch practice, skills coaching and team selling with Client Sites. Customers have seen success using this Peer2Peer approach.

Strengths	**Challenges**
• Sales content management	• Market awareness outside of North America
• Sales coaching and learning	• Larger heavily funded competitors
• Front-line manager workflow and data for coaching	
• Digital Client Sites	
• Social learning	
• Front-line manager enablement	
• Ease of use and administration	
• Deep enablement domain expertise	
• Cash flow positive business	

Salesloft

Salesloft, based in Atlanta, announced that industry veteran David Obrand was named as CEO in February 2023. Following that news, other executives were announced, including Sam Loveland as Chief Customer Officer and Randy Littleson as CMO. Vista Equity remains as the largest investor in Salesloft.

Salesloft helped to pioneer sales cadence capabilities with its cadence frameworks The Salesloft Platform includes sales communications, conversational intelligence, analytics, guided selling, deal management, forecasting and pipeline management, and sales coaching. In June 2023, Salesloft launched Rhythm, its new AI offering powered by its Conductor AI platform. Rhythm leverages data signals form Salesloft and other partners to guide sellers on the best next action in a particular deal. Other capabilities include AI Generated Summaries and action items.

In February 2023, Salesloft announced new bundles that include Essentials, Advanced, and Premier editions. Salesloft continues to integrate 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.

Due to its growing partner Integrations, Salesloft now has a marketplace with over 130 third-party integrations, including Slack, LinkedIn, G-suite, Microsoft Outlook, CRM (Salesforce, MS Dynamics, HubSpot), and GTM providers like 6Sense, Vidyard, Seismic, Drift. Salesloft has a growing presence in North America and EMEA. Salesloft has a Mobile Sales app for iOS and Android to help sales reps on the go with the latest signal and deal guidance.

<table>
<tr><td align="center"><u>Strengths</u></td><td align="center"><u>Challenges</u></td></tr>
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- Ease of use
- Sales communications
- Conversational Intelligence
- Partner ecosystem
- Sales cadences

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

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Seismic

Seismic, led by Founder and CEO Doug Winter, has continued its strong growth and now touts an annual revenue run rate of over $300M. Seismic offers its Enablement Cloud, which it announced in April 2022. The Seismic Enablement Cloud platform includes sales content management, sales coaching and learning, strategy and planning, content automation, buyer engagement, and enablement intelligence.

The Seismic Platform also offers rich content experiences that include Smart Plays, dynamic email templates, digital sales rooms and new global privacy management. Seismic also offers immersive, choose-your-own-adventure style presentations that allow the audience to drive the conversation. 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.

Seismic's coaching capabilities include components from its Lessonly acquisition (now "Seismic Learning" product) combined with Seismic Skills, Knowledge, Practice, and Meetings modules. This set of capabilities provides JIT learning, role plays, targeted recommendations for role performance, and opportunity-specific recommendations. They also offer Skills coaching as well as targeted recommendations for role performance and opportunity recommendations. Finally, for managers, the platform provides specific recommendations for individuals who need targeted coaching. In October 2022, Seismic announced that it is partnering with Cisco and integrating Seismic Meetings with Cisco Webex and it has since added Zoom as a partner. Microsoft Copilot is also a tightly integrated which enhances rep productivity and elevates the buyer experiences at scale for selling teams with complex buying cycles.

Strengths	**Challenges**
• Automated content assembly	• Awareness in APAC
• Install base	
• Analytics	
• Content management	
• Content automation	
• Content discoverability	
• Customer success initiatives	

Contenders

Allego

Allego, led by CEO Yuchun Lee, repositioned its offering in June 2023 as GO: The Modern Revenue Enablement Platform.

GO's revenue enablement suite includes sales content management, sales readiness and learning, Conversation Intelligence, and Digital Sales Rooms (DSRs). Allego's DSRs enable revenue teams to provide personalized buying experiences that today's buyers expect. Functions include personal video and live messaging, templates that can easily be customized, content engagement analytics, and a flexible security model. New capabilities in 2023 included the ability to manage sales content natively with Google Workspace, deeper integration with Salesforce, mobile access to and management of DSRs, and learning across multiple languages.

Allego's Sales Coaching includes role-plays with AI-generated virtual actors that simulate real-world sales interactions. And a key feature in its Sales Learning solution is the ability to create Flash Drills, personalized questions delivered to a rep's mobile device or desktop to reinforce learning.

Allego's EnablementAI, powered by generative AI, enables revenue teams to scale sales coaching, optimize content usage, and provide continuous learning. Its Conversation Intelligence tool taps into the company's EnablementAI to deliver tailored learning and actionable coaching in real time. Key features of Allego's Conversation Intelligence include call transcription across multiple languages, automated coaching alerts, and the ability to curate bite-sized call highlight reels.

Allego focuses on multiple markets, including financial services, life sciences, manufacturing, and high tech. Allego offers a complete revenue enablement platform, and their heritage with video content positions them well for the future.

Strengths	Challenges
• Sales content management • Video learning • Conversational intelligence • Salesforce and Outlook integrations • Content creation and sharing • Video coaching and practice	• Focus outside of North America

Mindtickle

Mindtickle, based in San Francisco and led by CEO Krishna Gopal Depura, focuses on overall Sales Enablement and Coaching and raised its second major $100M funding round in August 2021. Mindtickle is privately held and has total funding of $281M. The Mindtickle sales enablement platform features sales content management, sales coaching, and learning, which includes onboarding, training, microlearning, and role plays. In 2021, Mindtickle enhanced its platform with the announcement of Call AI, its conversational intelligence offering.

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. In addition to Asset Hub, Mindtickle acquired Enable.Us in Q2 of 2023 to enhance its digital sales room (DSR) offering and provide a more buyer-centric experience.

In August 2023 Mindtickle announced Mindtickle Copilot, which will work with Coaching, Deal analysis, and training analysis. In October 2023 Mindtickle announced new AI Search and role-based home pages. They also announced CHAMP and MEDDPICC scores for sales calls. Integrations with Microsoft 365 were also enhanced.

Mindtickle 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	**Challenges**
• Platform approach and single data model	• Awareness outside of the U.S.
• 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	

Showpad

Showpad, based in dual Chicago and Ghent HQs and led by CEO Hendrik Isebaert, continues to offer its sales enablement platform, Showpad eOS. The Showpad product portfolio has grown, and today it includes Showpad Content, Showpad Coach, Showpad MeetingIQ, and Showpad Video. Showpad Coach is its coaching and sales learning solution.

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 and asset recommendations so the right content can be shared at the right time.

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

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. Along with its strengths in content creation and the ability to update content for everyone, Showpad integrates with CRM systems such as Salesforce and Microsoft Dynamics, so sales professionals don't waste time looking for files or updating their CRM with the latest activities and can even share content from Showpad directly from their CRM.

Strengths	**Challenges**
• Mobile experience	• Balancing focus on sales enablement and training
• Content analytics	
• Content sharing	
• Salesforce integration	
• User interface	
• Interactive buyer experiences	

Revenue Grid

Revenue Grid's pioneering revenue intelligence platform helps organizations scale revenue growth and profitability through 360-degree pipeline visibility and AI-driven insights that improve workflow processes and employee productivity. Revenue Grid continues to innovate its AI-based revenue intelligence engine. Its product offerings include email cadences, sales communications, content management, Activity Capture 360 and analytics. Guided selling from Revenue Grid starts from pipeline health check with AI scoring: intuitive dashboards that provide real-time visibility of the progress and status of each deal.

In September 2023, Revenue Grid announced its new Sales Intelligence Engine that includes AI-powered guided sales coaching, next best action recommendations, and real-time updates on the status of opportunities.

The Revenue Grid revenue intelligence 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. Summer 23 updates included new Revenue Signals reports that can show how a sales team is leveraging the signals.

Revenue Grid offers out-of-the-box integrations with Salesforce, SAP, Oracle, and Microsoft Teams, Dynamics, Outlook, and Google Mail. Its growing number of integrations and automatic activity data capture mean that it uses far more reliable data to drive its intelligence and can respond to the sales process in real time.

In its Spring 23 release, Revenue Grid also announced new Revenue Leaks reporting, improved Book Me confirmation page, as well as forecast evolution reports. With a growing focus on AI, Revenue Grid is well-positioned for the future.

Strengths	**Challenges**
• Automated activity capture	• Market awareness
• Real-time guided selling	
• AI-based revenue intelligence	
• Contextual coaching	
• Dashboards and reports	
• Sales communications	
• Install base with OEM partners	
• CRM integrations	
• Flexible deployment	
• Stringent data security and privacy for highly regulated industries	

Revenue.io

Revenue.io, led by founder and CEO Howard Brown, added a new CMO, Brandee Sanders, in 2023. Revenue.io continues offering its RevOps platform, its RingDNA dialer, conversation intelligence, coaching, and guided selling. In May 2023, Revenue.io announced that it was adding Generative AI to its offering. The new capability includes the ability to automate meeting follow-up from Meetings such as Microsoft Teams.

Revenue,io offers its RingDNA dialer and the rest of its platform in the Salesforce AppExchange. It also is available via the Microsoft and Zoom marketplaces. RingDNA helped to pioneer the shift to conversational AI. Via its conversational AI offering, teams to organize calls into libraries to help to improve coaching.

Revenue.io can now offer full real-time integration into its built-in sales cadence solution, Guided Selling. This makes it ideal for sales teams to know who to reach out to and what they should discuss. Guided Selling also includes auto activity logging and generative follow-up. The industries that Revenue.io focuses on Energy, Financial Services, Retail, Technology, and Telecommunications.

Strengths	**Challenges**
• Intelligent dialer	• Market awareness outside of the U.S.
• Sales playbooks and sequences	
• AI /conversation intelligence	
• Task management	
• Sales coaching	
• Automatic content conversion engine	

Innovators

Conquer

Conquer, based in Reno, Nevada and led by Founder and CEO Joshua Tilman, focuses on sales communications, cadences, and guided selling. Conquer offers voice, video, email, and text communications capabilities, and it continues to be one of the few providers that is native to Salesforce. Its two flagship products are Conquer Cadence and Conquer Voice.

Conquer Cadence is 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 enterprises can look at this method of CRM update vs. the cost of Salesforce upgrades.

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.

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 supports inbound sales capabilities, that include advanced skill-based call routing. Conquer offers expanded voice capabilities such as stereo call recordings and its drag and drag-and-drop drop integrated voice response (IVR) builder to enable more seamless inbound call flows and reduce IT dependency.

Conquer also can make sure that a rep does not over-communicate or spam a prospect, via its configurable compliance tools. Conquer's scalable voice communications and dialer is one of the reasons it is winning in Sales environments.

Strengths

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

Challenges

- Market awareness outside of the U.S.

Pitcher

Pitcher based in Zurich, announced in August 2023 that Greg Schottland was taking over as CO. This follows its May 2022, round of funding from Crest Rock Partners, where Schottland was an Operating Partner. Founder Mert Yentur will now serve as Chief Strategy Officer. Pitcher focuses on Sales Enablement. The Pitcher SEP provides the full capabilities Sellers need for the full range of their efforts, from pre-call planning to automatic, amendable reporting in the CRM. In many ways, Pitcher provides much of the functionality of a Sales Assistant. An increasing portion of this capability is supported or driven by AI:

- Pre-call planning: next best action derived from CRM notes and data, plus automatic custom content recommendations and creation from marketing repositories based on metrics captured as part of closed-loop marketing.
- Customer engagement with real-time listening and sales feedback, plus sentiment analysis
- Automatic, detailed meeting critique and coaching.
- Automatic, multichannel and omnichannel communication.
- Full access to CRM data, online or offline, with instant synchronization if the meeting capture takes place without internet access.
- A recent capability is "Repless Selling," where customers can submit natural language questions via multichannel and receive an instantaneous response.
- It also offers CatalogIQ™, a module that automatically builds detailed product catalogs, presentations, or DSRs from product databases, external reviews, ERP systems, etc., that can be customized on the fly by Sellers.

Pitcher focuses on key industries, including Life Sciences/Pharmaceuticals, MedTech, Consumer Goods, Manufacturing, and Financial Services. Pitcher has System Integrator (SI) relationships with Accenture and Deloitte. Some of the SI deals may be related to its ongoing campaign partnering with Salesforce to augment or replace Veeva Systems in Pharmaceutical Accounts following Veeva's announcement terminating their partnership with Salesforce in favor of migrating the Veeva base to Vault as its CRM. Pitcher's platform provides a fully integrated eDetailing and MSL solution as an alternative to Veeva Systems iRep.

Strengths	**Challenges**
• Ease of use	• Market awareness in U.S.
• Mobile-first application	
• Off-line functionality	
• Life sciences expertise	
• Sales coaching and learning	
• eDetailing	
• Task and activity management	

vablet

vablet led by CEO Paul Pacun, continues to offer its Sales Enablement platform. Vablet is popular with life sciences firms due to its content management and its mobile content management capabilities. The vablet platform offers sales content management, coaching and learning, and forms.

One of the leading capabilities of vablet is the ability to push new content to devices with full tracking capabilities and full offline access. Vablet also includes strong forms capabilities, making it ideal for kiosk 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 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.

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. Because of its strong mobility and content management capabilities, vablet is winning in life sciences, financial services, and medical devices.

Strengths	Challenges
• Content management	• Market awareness
• Video support and expertise in handling video	
• Document and video analytics	
• Extensive Salesforce integration	
• Optimized for mobile devices	
• Sales coaching and learning	
• Integrations	

VanillaSoft

VanillaSoft, led by CEO David Hood, announced a significant growth investment from Tritium Partners in September 2023. They also announced that Louis Summe, former CEO of LiveVox, will join as Executive Chairman.

VanillaSoft 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.

In November 2023, VanillaSoft announced Autoklose Komposer, an AI-powered offering that allows for the generation of sales content with an emphasis on personalization. Autoklose also includes email campaign management, email sequences, and sales intelligence data.

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

Getting Started with Sales Enablement

Sales enablement platforms just got smarter with the rise of Intelligent Sales Assistants. The content sharing, cadences, communications and coaching, and guided selling are capabilities that sales teams need. With Intelligent Sales Assistants, automation will improve and become more automated that ever before.

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 the investment in Intelligent Sales Assistants.

- Regarding AI and the automation it delivers, enterprises should look at product roadmaps carefully before selecting a provider.

- Sales is still a relationship business and sales reps on the go need mobile sales capabilities. Enterprises should test the mobile functionality that a provider offers if that is a requirement for your sellers.

Bottom Line

The Sales Enablement market is poised for change. Generative AI has made it possible to provide an interface that will help sales teams automate their content and their cadences. With this new intelligence sales teams can be more productive and more adaptive. Not all providers will offer the same capabilities and this will drive further market consolidation.

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:

- **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*