The Aragon Research Globe™ for Sales Enablement Platforms, 2025

Assistants and AI Agents Are the New Normal

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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

The Sales Enablement Platform (SEP) market is undergoing a fundamental transformation, moving beyond its roots in content management to become an AI-driven engine for sales productivity. The current landscape is now defined by the rise of Intelligent Sales Assistants, the evolution of AI-powered Sales Coaches, and the dawn of autonomous Agentic AI.

Key Finding:

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

As AI enters the market, sales enablement providers are evolving to meet the need for AI-powered automation of sales processes. With Generative AI now being table stakes, Intelligent Sales Assistants are here, and with them is the arrival of Sales Agents that can perform tasks.

For years, the Sales Enablement market has steadily evolved, driven by the need to equip sales teams with the right content, training, and tools for any buyer interaction. The market has progressed from digital content repositories to comprehensive platforms integrating learning and basic automation. Today, however, the pace of change has accelerated dramatically, with Generative AI and Large Language Models (LLMs) acting as a powerful catalyst.

The conversation has moved beyond simple automation to the deployment of Intelligent Sales Assistants that act as a digital work hub for sales professionals. These assistants are rapidly becoming table stakes, automating daily tasks around content creation and prospect communications. Yet, this is only the beginning. The market is now on the cusp of its next major disruption: the introduction of agentic AI. These autonomous agents, such as AI Sales Development Representatives (SDRs), promise to handle complex, multi-step tasks, fundamentally altering the structure of sales teams and creating new avenues for competitive advantage.

This research note evaluates this rapidly evolving market, examining the key trends reshaping the industry. We will analyze the impact of intelligent assistants, AI coaches, and the new class of agentic AI.

The Intelligent Sales Assistant Becomes the Central Hub

The concept of an Intelligent Sales Assistant is no longer a future prediction but a present-day reality. By the end of 2025, it is expected that 65% of SEP providers will have integrated an intelligent assistant into their platform, powered by generative AI. These assistants are becoming the central nervous system for sales representatives, unifying previously siloed functions into a single, conversational interface.

Instead of navigating multiple applications, a sales rep can now rely on an assistant to handle a variety of tasks. This includes composing personalized emails, generating customized documents from templates, summarizing meeting notes, and identifying key action items. Many SEP providers, including Bigtincan, Seismic, Highspot, and Salesloft, have already released assistant capabilities, demonstrating the market's rapid shift.

These assistants are moving beyond simple task execution. By integrating with both content repositories and communication channels, they can suggest the most effective content for a specific deal stage or recommend the next best action to engage a prospect. This evolution marks a critical shift, transforming the SEP from a passive library of assets into an active, intelligent partner that helps sales teams work more efficiently.

*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.*

The Dawn of Agentic AI and the Rise of the AI SDR

While assistants react to user prompts, the next frontier is agentic AI—autonomous systems that can independently execute complex, multi-step tasks. The most prominent example of this trend is the emergence of the AI Sales Development Representative (AI SDR). This new class of agent is designed to take over the entire top-of-the-funnel prospecting process, which is traditionally handled by human SDRs and supported by sales communications tools.

An AI SDR can autonomously:

- **Prospect:** Identify and research potential leads based on an ideal customer profile.
- **Engage:** Execute multi-touch, omnichannel communication cadences using personalized email, SMS, and other channels.
- **Qualify:** Interact with leads, answer initial questions, and score their intent.
- **Schedule:** Book qualified meetings directly on a sales representative's calendar.

This development represents a direct and existential challenge to the standalone sales communications and engagement market. Aragon predicts that by year-end 2025, 75% of the capabilities offered by traditional Sales Communications providers will be available through Intelligent Sales Assistants and their agentic successors. This will inevitably accelerate market consolidation, leading to the merger or acquisition of 60% of sales communications providers by the end of 2026 as their functionality is absorbed by broader platforms. The AI SDR is not just automating tasks; it is automating a role.

The AI Sales Coach Evolves from Analyst to Mentor

Sales coaching has long been a core component of sales enablement, but it has often been a manual, time-intensive process for managers. The infusion of AI, particularly conversational intelligence, has automated the analysis of sales calls, providing data on talk time, key topics, and sentiment. However, the market is now seeing the emergence of a more sophisticated AI Sales Coach that moves beyond retroactive analysis to become a proactive mentor.

The new generation of AI coaches provides real-time feedback and guidance to reps during live calls. They can prompt a rep with a key talking point if a competitor is mentioned or suggest a relevant customer story to share. This turns every sales call into a live training opportunity. Furthermore, these platforms are increasingly able to create an "Ideal Rep Profile,"

benchmarking the behaviors and performance of top sellers and tracking gaps for the rest of the team.

Rather than simply providing managers with a dashboard, these AI coaches are creating personalized, data-driven learning paths. If the AI detects a rep is struggling with objection handling, it can automatically assign a micro-learning module or a video role-play exercise to address that specific skill gap. This evolution transforms coaching from a subjective, periodic review into an objective, continuous development process, scaled across the entire sales organization.

Sales Enablement Platform Market Overview

While there are different views, Aragon looks at Sales Enablement as one market with different sets of capabilities—delivered by some but still broken down into Content Management, Communication/Cadences, and now Sales Assistants and Sales Agents.

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, 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, CRM providers will also offer Intelligent Sales Assistants. To date, only Salesforce customers with an unlimited edition are eligible for their ISA.
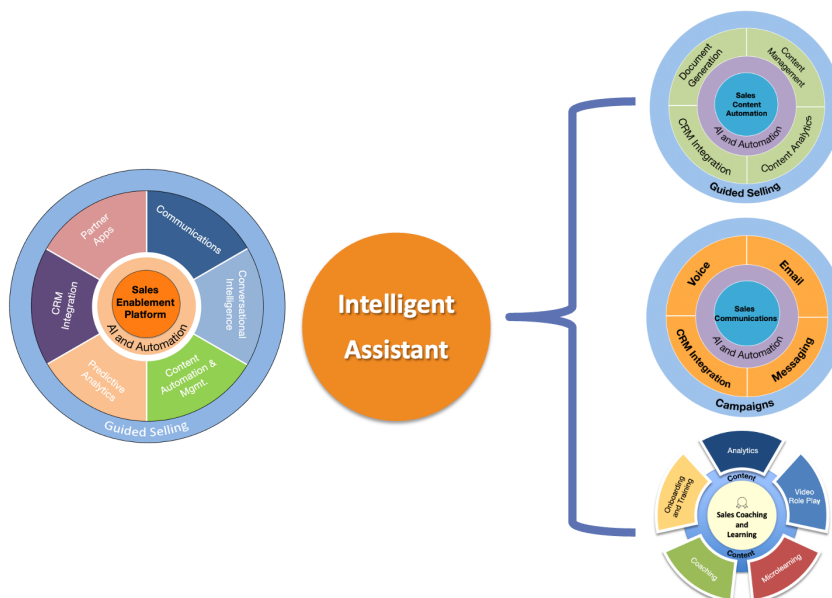

Figure 1: Sales enablement platform providers are investing in Intelligent Sales Assistants.

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. The rise of sales agents will enable a new level of automation, and in some cases, with AI SDR agents, the AI agent may use the SEP to automate the reach out and actually set up calls for their human account executive.

This makes the idea of one platform for all Sales 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).*

Sales Content Automation—Gets Faster

Intelligent Sales Assistants are here to help draft meeting agendas and sales emails and do them 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.

Sales Assistants can be used to write compelling content and to assist in developing more customized proposals than ever before. Salespeople who can use their SEP-based Sales Assistant to auto-generate proposals can save 1-2 hours of time a day.

The challenge for sales teams is to embrace content automation. In an age of AI Assistants, enterprise sales teams need to embrace these capabilities.

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
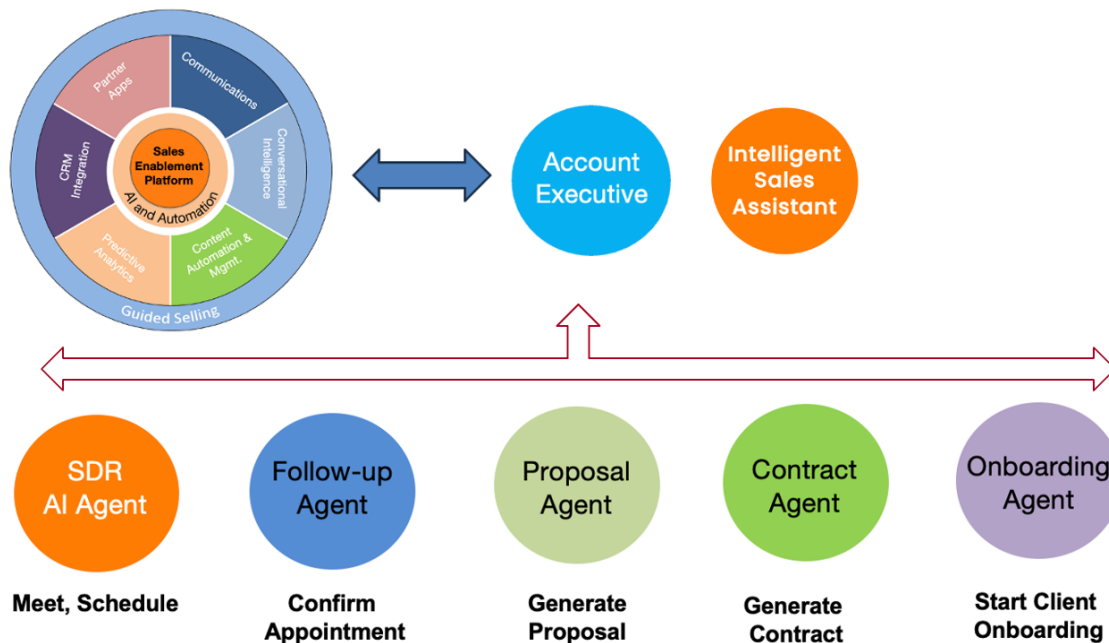
Figure 2: Sales enablement platforms are becoming more intelligent in helping teams with productivity and overall engagement.

How Is the SEP Market Evolving?

The Sales Enablement market is evolving from a feature-driven landscape to an AI-dominated arena. This evolution is characterized by a high-stakes race for platform dominance and the emergence of a new human-agent operational model in sales.

The Race Between SEP and CRM for AI Dominance. A significant battle is underway between specialized SEP providers and incumbent CRM giants. While SEPs have historically focused on the workflows and content needs of sales reps, CRM providers are now aggressively embedding AI assistants and agents into their own platforms. CRM providers hold the advantage of owning the core system of record for customer data, which is essential fuel for AI.

However, SEP vendors have a deep, specialized understanding of sales processes, content intelligence, and coaching methodologies. Their advantage lies in their agility and singular focus on sales productivity. This competition will be a boon for innovation, but it will force enterprises to make a critical architectural decision: will the SEP or the CRM serve as the primary intelligence layer for their sales organization?

The Rise of the Multi-Agent Sales Team

The evolution of agentic AI will lead to a new operational model. Human sales representatives will have more AI Agents to help them with repetitive tasks. This trend is now characterized by the rise of the AI SDR.

Prediction: By year-end 2027, the average enterprise sales representative will be augmented by a team of 3-4 specialized AI agents doing repetitive work for them (60% Probability).

This AI Agent team will include:

- An AI SDR to manage prospecting and appointment setting.
- A Proposal Agent to autonomously generate complex, customized proposals by pulling data from CRM and content repositories.
- A Customer Onboarding Agent to manage initial post-sale communication and resource sharing.

This shift will redefine the role of the human sales rep, elevating them from performing tasks to orchestrating agents and focusing on strategic relationship-building and complex negotiations.

Work Hubs Turn Up the Heat, Forcing a New Breed of Sales Assistants

The competitive landscape for small and medium-sized business (SMB) sales tools is undergoing a significant shift, driven by the integration of powerful generative AI into ubiquitous work hub platforms. As Microsoft 365 and Google Workspace with Gemini embed sophisticated AI assistants for tasks like email composition and document summarization, they are setting a new baseline of expectations for SMB users. This mainstream adoption of AI within foundational business tools is putting immense pressure on specialized Sales Enablement Platform (SEP) vendors. No longer can SEPs compete solely on the novelty of AI; they must now deliver tangible, sales-specific value that transcends the broad productivity enhancements offered by the tech giants.

This evolving market dynamic is forcing the next evolution in sales technology: the rise of the tailored Sales Assistant. To maintain their foothold and demonstrate clear return on investment, SEP providers are compelled to offer highly specialized, in-workflow AI solutions that address the nuanced challenges of the sales cycle. Instead of general-purpose AI, the focus is now on developing sales-native assistants that provide real-time coaching during live sales calls, analyze conversational data to deliver predictive lead scoring, and autonomously manage complex follow-up sequences based on deal progress. For SMBs, this means a move away from disparate tools and toward integrated platforms where AI is not just a feature but a core, revenue-generating team member. The ability to offer these deeply embedded and sales-process-specific AI capabilities is rapidly becoming the key differentiator for SEPs vying for the attention of the competitive SMB market.

How Can Enterprises Take Advantage of and Gain a Competitive Advantage from this Market?

Enterprises that strategically deploy these new capabilities can create a significant competitive advantage. The focus should be on leveraging technology to amplify human potential and scale operations efficiently.

First, deploying Intelligent Sales Assistants across the sales team can unlock immediate productivity gains. Automating administrative tasks like data entry, meeting summaries, and follow-up emails can save representatives hours each week, freeing them to focus on revenue-generating activities. Automating proposal generation alone can save 1-2 hours of time per day for reps involved in complex sales.

Second, enterprises should pilot AI SDRs to scale their top-of-funnel activities without a linear increase in headcount. This allows a company to expand its reach and generate more qualified pipeline at a lower cost per lead, giving its human sales teams more at-bats with qualified buyers.

Finally, leveraging AI Sales Coaches creates a culture of continuous improvement. By providing objective, data-driven, and personalized feedback, enterprises can standardize the winning behaviors of their top performers and accelerate the ramp-up time for new hires, leading to higher quota attainment across the board.

SEP providers have continued to innovate, particularly when it comes to adding conversational intelligence, 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.

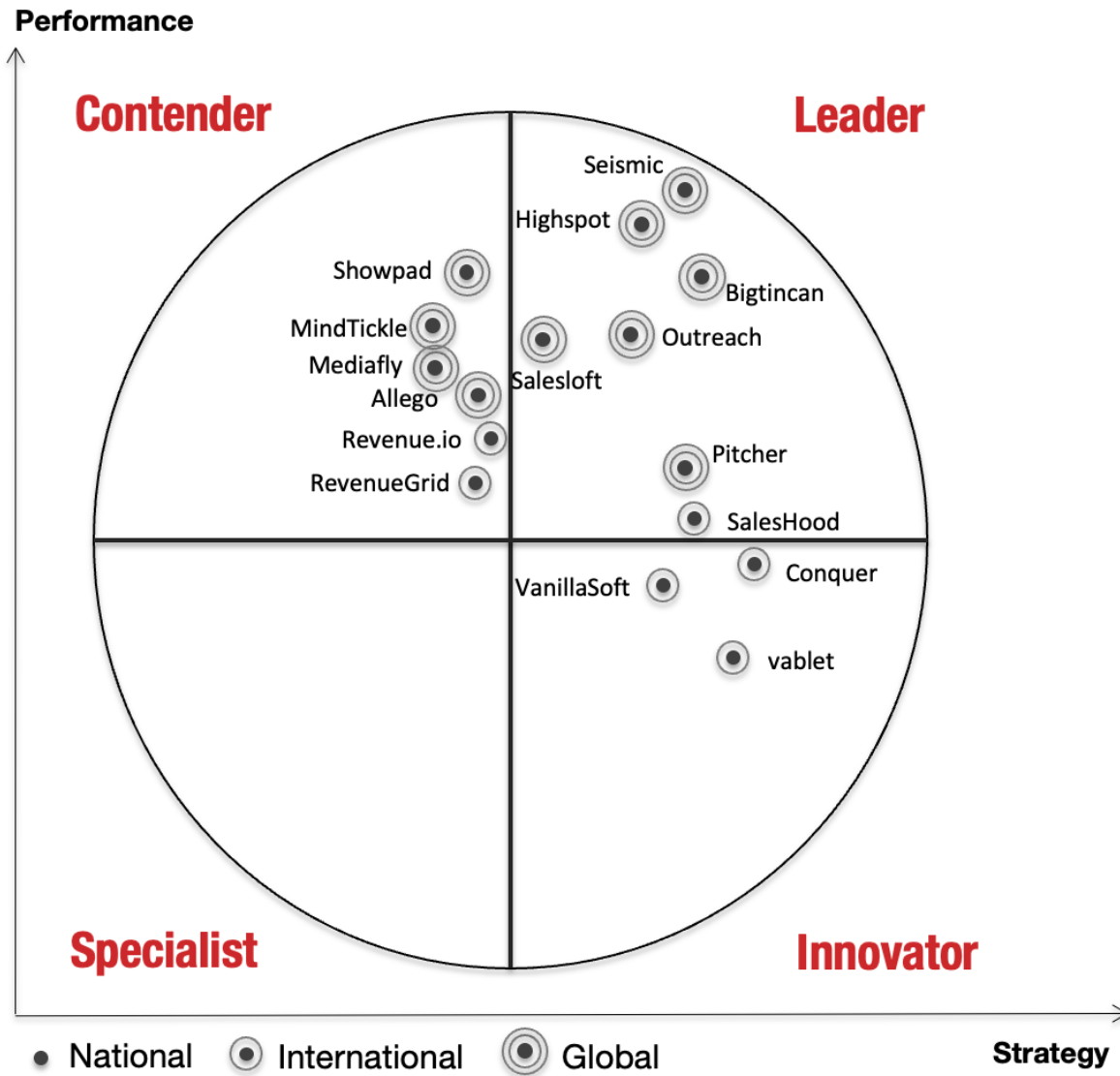# The Aragon Research Globe™ for Sales Enablement Platforms, 2025
(As of 7/22/25)

Figure 3: The Aragon Research Globe for Sales Enablement Platforms, 2025.

Leader

Bigtincan

Bigtincan, based in Boston and led by CEO David Keane, was acquired by Vector Capital on April 23, 2025. In June 2025, Bigtincan announced two new executive appointments: Bob Slaby as Chief Customer Officer and Kevin Collins as Chief Operating Officer. The company provides a sales enablement platform, offering products for communications, sales content, coaching, and learning.

Bigtincan continues to offer AI. In January 2025, the company announced GenieAI Pro, an advanced suite of AI features. GenieAI Pro includes Genie Assistant Pro and AuthoringAI Pro. Genie Assistant Pro provides access to external repositories and website indexing, allows for AI-generated podcast creation from content, and features voice chat and visual analysis capabilities. AuthoringAI Pro introduces digital avatars for narrating training and presentations and offers automated content translation into 32 languages.

Bigtincan provides a coaching application, which enables on the fly creation of coaching simulations. The coaching application assists with sales onboarding through practice sessions, call reviews, and active coaching. Analytics and feedback to sales reps includes tone-of-voice analysis for enthusiasm, confidence, and clarity. Additionally, Managers can create coaching assignments based on Bigtincan GenieAI feedback, including role-play scenarios. The platform records customer interactions from Zoom and Microsoft Teams.

Bigtincan targets vertical markets including life sciences, financial services, manufacturing, technology/telecom, energy, and B2C retail providers such as large franchises and big box stores. Bigtincan offers integrations with platforms such as Zoom, Cisco, and Microsoft Teams. No new integrations have been announced in 2024. The company's prior investments in AI and its recent executive appointments position it to address the demand for AI and automation and to expand its operational capabilities.

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, based in Seattle, and led by CEO Robert Wahbe, continues to offer enterprises a full Sales Enablement Platform. Highspot is privately held, and investors include Iconiq, Salesforce, Openview and others. Highspot offers sales content management, playbooks, guided selling, and sales coaching and learning.

Highspot continues to develop its product offerings, including its AI capabilities. Most recently, Highspot's Summer Launch introduced new AI capabilities powered by Highspot Nexus™, the company's unified AI and analytics engine. Nexus turns GTM signals, from content to meetings, to buyer behavior, into role-based and real-time guidance. Specifically, Highspot Agents use the signals from Nexus to power actions on behalf of sales, marketing, and enablement teams.

Highspot also just introduced Adaptive Learning, Skill Coaching, and Role Play, which build on functionalities such as Meeting Instant Answers, generating insights from go-to-market resources or individual assets. It also assists in drafting personalized prospect emails, creating meeting summaries and follow-ups. Highspot's AI can generate relevant content descriptions and tag items, aiding marketing and sales enablement teams. Highspot's platform utilizes AI to assess content usage across buyer conversations, providing marketing teams with visibility into content performance.

Highspot's AI-powered sales coaching tools provide real-time guidance for meeting preparation and skill refinement, along with micro-learning quizzes. Its AI evaluates sales pitches and customer meeting recordings, providing automated feedback. The platform enables insight-driven coaching through timelines of recordings from various meeting platforms, featuring AI-identified conversation topics, presented content, and key discussion points.

Highspot focuses on its SmartPage technology, which aims to make content more contextual and offers content suggestions to sales representatives. The platform allows for the customization of its user interface for different teams and facilitates the surfacing of relevant information. Highspot maintains a partnership with Salesloft for sales communication and cadences.

Highspot's content governance policy capabilities are designed to maintain content relevance. These capabilities, alongside its AI features, position Highspot for addressing demand for automated email generation, custom playbooks, and customer-focused content.

<table>
<tr><td align="center">**Strengths**</td><td align="center">**Challenges**</td></tr>
<tr><td>

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

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- Awareness outside of U.S.

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Pitcher

Pitcher, with headquarters in Zurich and Denver, appointed Kevin Chew as CEO effective January 1, 2025, promoting him from Chief Revenue Officer. The company's last funding round was in May 2022 from Crest Rock Partners. Pitcher provides a sales enablement platform with use cases that include content management, seller effectiveness tools, buyer engagement, coaching, and analytics. The AI-driven platform is designed to automate administrative tasks and guide sales teams through the entire sales cycle.

The company positions its platform as "Sales Enablement 2.0," which utilizes AI to automate pre-call planning, recommend content, provide real-time coaching during customer interactions, and generate meeting summaries and follow-up tasks. Its AI-powered capabilities provide centralized access to all data, tools, and systems through backend integrations, automating many rep processes in a seamless, comprehensive environment.

In 2025, Pitcher has surfaced several features and capabilities positioned to be competitive in the market. These include the promotion of PIA (Pitcher's Intelligent Agent) as an AI assistant that supports reps with their everyday tasks to improve performance and results. Pitcher has also highlighted augmented reality capabilities that combine sales projections with product display visualizations, which has a significant use case in the Consumer Packaged Goods (CPG) industry. The company reported growth in the fourth quarter of 2024 from customer acquisitions in its target sectors, including the addition of medical imaging technology company, Polarean.

Pitcher primarily targets regulated and complex B2B industries, with a primary focus on Life Sciences, MedTech, Consumer Goods, Manufacturing, and Financial Services. Within the life sciences vertical, the company's platform provides eDetailing and Medical Science Liaison (MSL) solutions and is positioned as an alternative for companies using Salesforce CRM. Other target industries include Technology and Software, Publishing, and the Beverages-Alcohol sub-industry within CPG.

The platform integrates with major enterprise systems, including Salesforce, SAP, Oracle, and Microsoft Dynamics 365. Pitcher also maintains relationships with system integrators such as Accenture and Deloitte to support deployments. The company's strategy often involves a close partnership with Salesforce, particularly in the life sciences market. Pitcher is positioned to support commercial teams by embedding AI-driven sales tools.

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	

SalesHood

SalesHood, based in San Francisco, is led by CEO Elay Cohen and CTO Arthur Do. In April 2025, SalesHood announced the promotion of Josh Cruickshank to Chief Customer Officer. Saleshood is an AI-powered sales enablement platform proven to drive repeatable revenue growth. SalesHood's AI Assistant supports role playing, coaching, content recommendations, and publishing,

The SalesHood platform offers branded document and video content delivery, just-in-time learning, prescriptive coaching, guided selling, and performance correlations. SalesHood also offers digital Client Sites for customer and prospect engagement. It also offers Digital Sales Rooms and Interactive Mutual Action Plans, which let sellers and buyers co-create timelines.

SalesHood continues to offer AI. In April 2025, SalesHood launched AI Role Play, which provides personalized, adaptive training simulations for sales and customer success teams. This feature allows users to practice selling skills and receive instant feedback, insights, and coaching tips, aiming to strengthen messaging, objection handling, and closing techniques. Key features of AI Role Play include realistic AI-driven training, context-rich preparation, a user-friendly manager dashboard for monitoring progress, customizable scenarios and personas, and no-code setup. AI Role Play leverages SalesHood's AI architecture, which integrates third-party and localized language models. SalesHood continues to offer AI Coach, providing customer-facing teams with real-time and AI-generated feedback on tone, duration, speed, and key/restricted phrases. AI Coach generates visual and text-based performance summaries, enabling managers to have data-driven coaching conversations that reinforce core skills and improve execution.

SalesHood offers turn-key sales skills training and sales coaching templates in its library, Aslan+, The Brooks Group, MEDDICC, Spiced by Winning By Design. The company 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 within Hubspot, Salesforce and Microsoft environments. The company leverages a Peer2Peer approach for best practice sharing among revenue teams, focusing on use case storytelling, pitch practice, skills coaching, and team selling with Client Sites.

SalesHood focuses on industries that benefit from enhanced sales effectiveness and readiness, given its broad applicability across various sales functions. SalesHood offers guided selling in Salesforce and Microsoft. The platform also includes an Integration marketplace. SalesHood is positioned to support enterprises in improving sales performance and buyer engagement through its AI-driven platform and continued focus on customer success, coaching, and learning.

<table>
<tr><td align="center"><u>**Strengths**</u></td><td align="center"><u>**Challenges**</u></td></tr>
<tr><td>

- Sales content management
- Sales coaching and learning
- 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
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- Market awareness outside of North America
- Larger heavily funded competitors
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Salesloft

Salesloft, headquartered in Atlanta, is led by interim CEO Patrick Nichols. The company provides a Revenue Orchestration Platform that includes capabilities for sales communications, conversational intelligence, analytics, guided selling, deal management, forecasting and pipeline management, and sales coaching. Salesloft has not announced new funding within the last year, with Vista Equity remaining its largest investor. Its current product offerings include the Salesloft Platform, which unifies sales engagement, revenue intelligence, conversation intelligence, deal management, and forecasting.

Salesloft continues to expand its Artificial Intelligence (AI) offerings. The company continues to offer Rhythm, an AI offering powered by its Conductor AI platform, which uses data signals to guide sellers on next actions. In May 2025, Salesloft announced the expansion of its AI capabilities with 15 new autonomous AI agents, bringing their total to 26 agents either available or in development. These agents are designed to reduce manual work and accelerate sales execution, including capabilities like Account Research Agent, Buyer Identification Agent, Deal Summary Agent, and an "Ask Salesloft" Agent for chat-based data retrieval.

Looking at product announcements in 2024 and 2025, Salesloft's Spring 2025 release introduced the new AI agents. This release also included enhancements to Conversation Intelligence, offering deeper insights from sales calls through comprehensive data extraction, analytics, and reporting. Enterprise-grade flexibility, customization, and control were also added, enabling multi-team enterprise management. In 2024, Salesloft introduced new bundles, including Essentials, Advanced, and Premier editions. The Fall 2024 product update included Command Center, a new home base for revenue leaders with action-oriented insights, and AI Insights for optimizing revenue performance. Also in 2024, Salesloft announced new plays to operationalize action on revenue insights and various other enhancements to reporting and actions within plays.

Salesloft targets a broad range of industries for B2B organizations seeking to drive durable revenue growth. Its focus is on enterprise-level clients across various sectors, including technology, manufacturing, and business services.

The provider offers a marketplace with over 130 third-party integrations, including Slack, LinkedIn, G-suite, Microsoft Outlook, and CRMs such as Salesforce, Microsoft Dynamics, and HubSpot. New integrations announced in 2024 include iPaaS integrations to connect external data into Salesloft workflows. Additionally, Salesloft introduced no-code signals and custom plays, allowing teams to turn proprietary data into action without needing custom APIs. The Spring 2025 release also highlighted enhanced integration capabilities, particularly for enterprise teams, including multi-team management without re-authentication. Salesloft is positioned to support revenue teams by integrating AI-driven automation and insights across the sales lifecycle.

Strengths	**Challenges**
• Ease of use	• Market awareness outside of North America, EMEA, and APAC
• Sales communications	
• Conversational Intelligence	
• Partner ecosystem	
• Sales cadences	

Seismic

Seismic, led by Founder and CEO Doug Winter, continues to report solid growth. Seismic offers its Enablement Cloud, a platform that includes sales content management, sales coaching and learning, strategy and planning, content automation, buyer engagement, and enablement intelligence.

The Seismic Platform provides content experiences, including Smart Plays, dynamic email templates, digital sales rooms, sales coaching/learning, program management, field communications tools, social selling tools, and global privacy management. Seismic also offers immersive, choose-your-own-adventure style presentations allowing audience-driven conversations. The platform includes native content automation with its LiveDocs functionality, enabling on-the-fly customization of documents for prospects and clients, which removes the need for a separate CA or CPQ offering.

Seismic continues to advance its AI vision. In June 2025, Seismic announced its Spring 2025 Product Release, introducing AI-powered tools designed to enhance preparation, coaching, and content creation for revenue teams. This release includes Role-Play Agent, which uses generative AI to simulate customer conversations based on Seismic content, providing instant feedback, insights, scoring, and recommendations for skill gap resolution. Aura AI agents are now embedded across Microsoft Teams, Microsoft Copilot, Slack, and Salesforce Agentforce. Aura Chat allows multi-turn conversations for asking questions, getting answers, researching topics, generating summaries, and taking action, while adhering to governance policies. Seismic's coaching provides just-in-time learning, role plays, and targeted recommendations for performance and opportunities. For managers, the platform offers specific coaching recommendations for individuals. Seismic has integrated Seismic Meetings with Cisco Webex and Zoom, and Microsoft.

Seismic targets organizations across various industries that aim to enhance revenue operations and customer engagement through advanced enablement solutions. This includes businesses with complex buying cycles and those seeking to leverage AI for sales performance. Seismic offers integrations with Microsoft Copilot, Slack and Salesforce Agentforce. The platform continues to leverage its integration marketplace to provide a connected experience for sales teams. With its ongoing advancements in AI and a comprehensive enablement cloud, Seismic is positioned to support global organizations in maximizing buyer interactions and accelerating revenue growth.

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

Outreach

Outreach, headquartered in Seattle, is led by CEO Abhijit Mitra, who was appointed in September 2024, succeeding co-founder Manny Medina, who transitioned to Executive Chairman of the board. In January 2025, Outreach appointed Nadia Rashid as Chief Revenue Officer and Holly Simmons as Chief Marketing Officer. The company continues to offer its Sales AI platform, which includes product offerings in Outreach Engage, Outreach Guide, and Outreach Commit.

Outreach continues to expand its AI capabilities. The company offers AI Assist, its Intelligent Assistant, which includes 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 has made its AI Revenue Agents generally available. These agents are designed to power workflows across the customer lifecycle, from outbound prospecting and inbound lead follow-up to managing renewal and expansion motions. They also enrich accounts with first and third-party data.

In 2024 and 2025, Outreach has introduced several product advancements. The company now offers enhanced sales leader experiences with expanded forecast and reporting insights. Outreach seamlessly integrates with Microsoft Dynamics for Forecasting and provides new forecast trend visualizations. The platform also includes enhanced reporting layouts and custom filters to monitor team and organization performance. For meeting insights, Outreach continues to offer Smart Topics and CRM sync for Kaia, with pre-trained smart topics that automatically track product and competitor mentions in conversations. AI-generated meeting and call summaries, along with meeting attendee details, are synced to CRM. Additionally, Outreach has focused on enhanced account visibility to improve seller productivity through streamlined seller workflows, augmented engagement timelines, updated activity feeds with meeting details in account views, and new tile layout formats for account plans.

Outreach targets a wide array of industries, including technology, financial services, healthcare, and business services. Its platform is designed for B2B sales organizations aiming to improve their revenue operations and sales execution. They also offer a marketplace with over 130 third-party integrations, including Slack, LinkedIn, G-suite, Microsoft Outlook, and CRMs such as Salesforce, Microsoft Dynamics, and HubSpot. Outreach maintains a native integration with Cisco Webex Meetings. The company also provides a Marketplace and Developer Portal, which enables third-party applications with minimal administrative involvement. Outreach is also available in the Microsoft Azure marketplace. Outreach is positioned to support sales organizations in optimizing their revenue workflows through its integrated AI platform and extensive ecosystem of partnerships.

<div style="display:flex">

Strengths

- Sales communications
- Cadences
- AI Assistant
- Voice, email, and SMS capabilities
- Predictive analytics including intent
- Automation and sequencing of sales activities
- Sales coaching

Challenges

- Content management capabilities

</div>

Contenders

Allego

Allego, led by CEO Yuchun Lee, provides a modern revenue enablement platform. The company has not announced any new executive appointments or funding rounds in the last year. Allego's primary offerings are consolidated within its single all-native-built platform, which includes AI-forward and rep-centered solutions for sales readiness and learning, content management, conversation intelligence, and digital selling experiences.

The company continues to advance its artificial intelligence capabilities. From June 2024 to June 2025, Allego has used the Allego 8 series to extend its Enablement AI features. This collection of AI-driven tools is designed to be best-of-breed for automating selling tasks, automating curation & training tasks, automating personalized coaching, and helping sales representatives adapt to the needs of their deals. Specific features include AI Live Dialog Simulators with an adaptive unscripted video role play partner, and flexible AI Virtual Coaching and scoring to provide feedback on soft skills development, sales methodology application, and messaging mastery.

Allego's product announcements in 2025 are centered around major advances in Agentic AI solutions that are made practical for easy adoption and maximum business impact. New features designed to streamline the digital selling experience include smarter 5th-generation Guided Personalization for Digital Sales Rooms with AI Answer assistants, richer Data Services supporting automated FlexDocs, and a Deal Navigator for intelligence across all aspects of an opportunity. To enhance skill development and analytics, the platform now includes AI Lesson Authoring, more automation behind Adaptive Learning use cases, and Revenue Stats dashboards, which provide insights into the correlations between sales results and all aspects of enablement–content use, training, coaching, and more.

Allego focuses on several key industries, including financial services, life sciences, manufacturing, and high technology. The company reports that its customer base includes a quarter of the Dow Jones Industrial Average companies and numerous large enterprises in banking, insurance, medical devices, and asset management.

The Allego 8 platform is designed to consolidate what were previously disparate systems, reducing the need for multiple point solutions and their associated integrations. The platform provides a unified environment for readiness, content, and selling tools. By offering a single, AI-forward platform that addresses learning, content, and sales execution, Allego is positioned to support the productivity and performance needs of revenue teams.

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

Mindtickle

Mindtickle, based in San Francisco and led by CEO Krishna Depura, provides an AI-powered revenue enablement platform. Its platform is built on a unified data approach and provides solutions spanning training, coaching, content management, Digital Sales Rooms, and conversation intelligence.

The company continues to build on its artificial intelligence offerings. In March 2025, Mindtickle announced new AI capabilities personalized for different revenue team roles. For sellers, an AI Copilot is designed to assist with call preparation, automate tasks, and provide real-time guidance. New features include AI-guided selling, which recommends content and training based on specific deal data, the automatic creation of Digital Sales Rooms, and the ability for sellers to personalize AI-driven role-play scenarios with deal-specific information.

New product announcements in 2025 also included AI-powered tools for sales managers and enablement teams. For managers, the platform now offers a personalized dashboard with team competency data, benchmarks, and coaching recommendations. For sales enablement teams, new AI features assist with rapid content creation by turning existing assets into training materials like videos and podcasts and support global teams with AI-powered content localization.

Mindtickle targets a range of industries, with a notable presence in technology, life sciences, financial services, and manufacturing. Its customer base includes companies in sectors such as computer software, cybersecurity, pharmaceuticals, and medical devices.

The platform is designed with an open ecosystem approach, allowing its AI Copilot to integrate with a customer's existing technology stack, including Customer Relationship Management (CRM) systems and other engagement platforms. With an emphasis on delivering role-specific AI capabilities within a unified platform, Mindtickle is positioned to provide comprehensive support for the various functions within a revenue organization.

<table>
<tr><th>Strengths</th><th>Challenges</th></tr>
<tr><td>

- 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

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- Awareness outside of the U.S.

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Mediafly

Mediafly, based in Chicago, is led by CEO Bill Walsh. In August 2024, Mediafly acquired Dooly Research Ltd., an AI startup focused on Salesforce note-taking. This was followed by the acquisition of Appinium LLC in June 2025, a learning management system on the Salesforce AppExchange. Mediafly received an $80 million investment in August 2023, led by BIP Ventures with support from Boathouse Capital and Mediafly insiders. Mediafly offers a Revenue Enablement Platform that supports content management, value selling, coaching, and revenue intelligence.

Mediafly continues to advance its product offerings, particularly in the area of Artificial Intelligence (AI). The platform features AI-powered analytics and a focus on AI-driven tools. Building upon its real-time insights and action engine, Mediafly introduced Iris, its generative AI for revenue enablement. With the acquisition of Appinium, Mediafly aims to strengthen its agentic AI-supported revenue enablement vision, where intelligent agents collaborate with sales teams to analyze content engagement, recommend training, surface next-best actions, and streamline execution. This acquisition integrates learning management capabilities directly into the AI-driven platform, enabling a unified approach to enablement, content, and insights.

Recent product announcements in 2024 and 2025 include the acquisitions of Dooly in August 2024 and Appinium in June 2025, which are aimed at enhancing AI and learning capabilities within the platform. The Appinium acquisition provides Mediafly with a Salesforce-native LMS, allowing for deeper data integration and context for AI agents. Mediafly has also focused on providing a comprehensive revenue enablement platform that combines sales, marketing, and analytics tools, supporting unified workflows and improved sales efficiency. The company continues to refine its core content engagement, value selling, and coaching capabilities.

Mediafly primarily targets enterprise B2B organizations across various industries. These include technology, manufacturing, life sciences, healthcare, and financial services. The platform is designed to address the specific needs of large organizations by simplifying complex sales cycles and ensuring compliance in regulated environments.

Mediafly offers seamless integrations with existing tech stacks, including major CRM systems such as Salesforce, SAP Sales Cloud, SAP Service Cloud, Microsoft Dynamics 365, Sugar Sell, HubSpot CRM, and Pipedrive. These integrations automate data capture, sync activities and engagement, and surface intelligent next-best actions and content suggestions directly within CRM interfaces. The acquisition of Appinium also extends Mediafly's functionality within the Salesforce ecosystem. Mediafly is positioned to support revenue teams in optimizing their sales processes and driving growth through its comprehensive platform and integrated AI capabilities.

<u>**Strengths**</u>	<u>**Challenges**</u>
• Sales Content Management	• Market awareness outside of North America
• Personalized Deal Rooms	
• Sales Coaching	
• Revenue Intelligence	
• SDK for third-party developers of "mini-apps"	

Showpad

Showpad, with dual headquarters in Chicago, USA, and Ghent, Belgium, is led by CEO Hendrik Isebaert. In February 2025, the company announced the promotions of Doug Grigg to President of Go-to-Market and Claire Carley to Vice President of People. While no new major funding rounds were announced in the last year, Showpad is expanding its operations, including a new R&D hub in Bucharest focused on AI, supported by previous investments and a year of sustained profitability in 2024. The company's core offering is the Showpad Enablement Operating System (eOS), which includes products for content management, seller coaching and training, and buyer engagement analytics.

The company has expanded its artificial intelligence capabilities within its platform. Showpad utilizes AI to generate asset summaries, suggest keywords, create test questions for training modules, and provide deeper insights from analytics. For sales coaching, its PitchAI feature allows sellers to practice presentations and receive real-time feedback. The platform's AI-powered search is designed to surface direct answers and relevant content more efficiently for users.

In February 2024, Showpad announced several new AI-powered solutions, including an Automated Content Builder and enhanced analytics with AnalyticsIQ. Throughout 2024, the company released updates that provided more streamlined administration experiences and enhanced analytics. The company has also previewed a forthcoming product, now available in private pilot, Showpad Assist, designed to further integrate into a seller's workflow.

Showpad serves a range of industries, with customers in sectors such as manufacturing, technology, healthcare, and financial services. The platform is built to support various go-to-market motions, including enterprise field sales and account-based selling, by providing tools to manage complex product information and customer engagements.

Showpad continues to maintain and update its key integrations with other business systems. In the last year, the company released updates for its integrations with Salesforce, Marketo, and SharePoint Online, including a new SharePoint connector released in August 2024. By focusing on integrating AI across its content and coaching platform and ensuring interoperability with core CRM systems, Showpad is positioned to support the operational needs of revenue teams.

Strengths	**Challenges**
• Mobile experience	• Balancing focus on North America/EMEA
• Content analytics	
• Content sharing	
• Salesforce integration	
• User interface	
• Interactive buyer experiences	

Revenue Grid

Revenue Grid, based in Atlanta, United States, is led by Interim CEO Maurizio de Franciscis , who took over from founder Vlad Voskresensky, who is now head of product. Revenue Grid provides a revenue action platform that includes products for sales engagement, automated data capture, revenue signals for forecasting and analytics, and CRM integration tools.

The company continues to advance its Artificial Intelligence (AI) capabilities. It continues to offer its Sales Intelligence Engine that includes AI-powered guided sales coaching, next best action recommendations, and real-time updates on the status of opportunities. In June 2025, Revenue Grid announced the launch of Mentor, a context-aware, conversational sales AI. This capability integrates with the user's CRM and is designed to provide sales representatives and managers with immediate, context-rich insights in response to plain-language queries. The feature is powered by the company's proprietary RG Brain, a decision engine that utilizes sales workflow data, behavioral signals, and live CRM information to offer strategic guidance.

Revenue Grid targets industries that typically have complex sales processes and require detailed data analysis and guided selling methodologies. These sectors include financial services, healthcare, and IT services. The platform's automated activity capture and AI-driven insights are positioned to support the sales outcomes in these verticals.

The platform integrates with major enterprise systems including Salesforce, SAP, Oracle, Microsoft Teams, Dynamics, Outlook, and Google Mail. In 2024, the company announced a collaboration with Microsoft Fabric and Cloud Services. This partnership has supported the modernization of Revenue Grid's data infrastructure, improving its capacity to centralize and manage data for sales performance functions. Revenue Grid is positioned to support sales teams by applying AI to its revenue intelligence platform and expanding its data integration capabilities.

Strengths

- Automated activity capture
- 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

Challenges

- Balancing focus on Sales Enablement vs CRM forecasting

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, based in Los Angeles, is led by founder and CEO Howard Brown. The company has not taken on any new funding within the last year. Revenue.io provides a revenue operations (RevOps) platform that is native to Salesforce and includes its dialer, conversation intelligence for real-time coaching and post-call analytics, and tools for guided selling and sales cadence automation.

The company has continued to build out its Artificial Intelligence (AI) offerings. Building on its generative AI capability for automating post-meeting follow-up emails, the company has expanded into real-time guidance. Its "Moments" feature, which provides live on-call coaching and talking points, now functions within Zoom meetings. The platform's AI also powers Conversation Scorecards, which automatically evaluate sales calls against defined methodologies to provide feedback for coaching.

In its Spring 2025 product update, Revenue.io announced several enhancements. The company expanded its conversation intelligence capabilities to include transcription and analysis for Microsoft Teams meetings in up to 23 languages, extending its utility for global teams. The update also introduced new AI coaching frameworks tailored for Customer Success (Customer Success Alignment Methodology) and Customer Support (Customer Support Engagement Framework) teams, expanding the platform's application beyond sales-focused use cases.

Revenue.io focuses on industries with business-to-business sales motions, including Technology and SaaS, Financial Services, Media and Information Services, and Telecommunications. The platform is built to support companies that utilize structured sales processes and seek to embed coaching and sales guidance directly into their daily workflows.

As a Salesforce-native application, the platform's primary integration is with the Salesforce CRM, and it is available on the AppExchange. It also offers integrations with Microsoft Teams, Zoom, Microsoft Outlook, and Gmail. The 2025 enhancement that extended real-time coaching into live Zoom meetings represents a deepening of its integration with video conferencing platforms. Revenue.io is positioned to support revenue teams by embedding AI-driven guidance and automation directly within their primary CRM and communication systems.

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	

Aragon Research

Innovators

Conquer

Conquer, led by CEO Greg Moran, announced its acquisition of Full Circle Insights in May 2025. The company has not taken on any new venture funding in the last year. Following the acquisition, Conquer provides a unified revenue platform that operates natively within Salesforce. Its products include sales engagement and workflow automation with Conquer Cadence; multi-channel communication tools like Conquer Voice, email, and SMS; marketing attribution and funnel analytics from the Full Circle Insights portfolio; and AI-driven tools for sales coaching and revenue forecasting.

The company utilizes Artificial Intelligence (AI) to support sales coaching and forecasting functions. Its AI capabilities analyze sales activity data to provide performance insights and inform revenue predictions. The platform includes features such as AI-Powered Battlecards, which give sales representatives real-time, context-sensitive talking points and objection-handling information during live customer calls, with all interactions and outcomes logged directly in Salesforce.

The primary product announcement in 2025 was the strategic acquisition of Full Circle Insights. This move combines Conquer's sales execution tools with marketing performance measurement, establishing a single, closed-loop data model on the Salesforce platform. The intended result is to give revenue teams a complete view of the customer journey, from initial marketing contact to a closed deal, without requiring data to be synchronized between separate systems.

Conquer targets enterprise B2B companies that have standardized on Salesforce as their central CRM. Existing customer examples show a focus on industries that include Financial Services, Waste Management, Technology, and other business services that rely on structured and measurable sales and marketing processes.

The platform's integration strategy is defined by its native-to-Salesforce architecture, where all its applications and data reside within the user's Salesforce instance. This approach is reinforced by the acquisition of Full Circle Insights, which also builds its products natively on the Salesforce platform. Conquer is positioned to provide a unified platform for sales and marketing teams that want to manage the entire revenue cycle within their existing Salesforce environment.

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.

vablet

Based in Irvine, California, vablet, led by CEO Paul Pacun, provides a sales enablement platform. There have been no new executive appointments announced in the last year. The company has not taken any new funding in the same period. The vablet platform's core product offerings include sales content management, coaching and learning, and forms.

The platform incorporates artificial intelligence to identify content that receives positive engagement and to provide AI-driven content recommendations to sales representatives. It leverages generative AI for sales reps and will incorporate AI voice recording by the end of the summer. This functionality is designed to improve the effectiveness of sales interactions by suggesting the most relevant materials for each opportunity. It intends to add a full Sales Assistant in the second half.

The company's existing platform provides capabilities for pushing new content to various devices with full tracking and offline access. It also features a robust forms tool, suitable for data capture in both online and offline environments, including for field representatives and kiosk applications.

vablet directs its sales enablement solutions toward several key industries, with a particular focus on life sciences, medical devices, and financial services. The platform is designed to meet the specific needs of these regulated sectors, emphasizing content control, compliance, and secure mobile access.

The platform offers a range of integrations with other enterprise systems. These include native integration with Salesforce, as well as connections to other CRM platforms like Veeva and SAP. It also integrates with cloud content management providers such as Box, Dropbox, Google Drive, and Microsoft SharePoint, and with business intelligence tools like Tableau and Power BI. No new integrations have been announced in 2024. With its strong mobile and content management capabilities tailored for regulated environments, vablet is positioned to continue its focus on these key vertical markets. It serves global markets with resources in UK/EU/Asia as well as US.

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 with headquarters in Gatineau, Quebec, and Austin, Texas, offers an omnichannel sales engagement platform that includes queue-based lead routing, autodialing, scripting, appointment setting, and communication across voice, email, and SMS.

The company has expanded its Artificial Intelligence (AI) capabilities. In January 2025, VanillaSoft introduced a voice transcription feature to its platform. This function transcribes recorded calls and uses AI to generate summaries. The capability is designed to support manager coaching, review for compliance, and provide sales staff with actionable information from conversations. This builds on its previous AI offering, Autoklose Komposer, which generates personalized sales email content.

The primary product announcement in 2025 has been the introduction of AI-powered voice transcription and summarization. The company also announced an email nurturing feature in March 2025, designed to send high-volume, personalized emails from individual addresses to improve deliverability and engagement. These updates enhance the platform's existing sales cadence and automation functionalities.

VanillaSoft focuses on organizations with high-volume sales activities. Key industries it targets include inside sales teams, higher education fundraising, hospitality, insurance, banking, and finance. The platform's features are built to support both outbound prospecting and inbound lead response for these sectors.

The platform can be used as a standalone solution with its own built-in CRM or in combination with existing systems. It offers direct, bi-directional integration with Salesforce and connects with hundreds of other applications through Zapier. VanillaSoft is positioned to provide sales teams with a structured process for managing high volumes of leads and automating communication outreach.

Strengths	**Challenges**

Strengths	Challenges
• High-volume, high-value outbound calling	• Market awareness
• Email and text messaging	
• CRM capabilities	
• Salesforce integration	
• Activity and voice analytics	
• Dynamic contact prioritization	
• Automation of repetitive tasks	
• Message deliverability	

Getting Started with Sales Enablement

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

Enterprises often invest too much in CRM, which often does not help Sales Rep productivity. Aragon feels that enterprises that do not leverage an SEP face significant disadvantages over those that do.

Aragon Advisory

- **Evaluate AI Roadmaps, Not Just Current Features.** The market is innovating at an unprecedented pace. When selecting a vendor, look beyond their current assistant. Scrutinize their investment and roadmap for agentic AI, their strategy for data integration, and their plans for developing specialized agents. The winning platforms of tomorrow are being built today.
- **Architect for an Integrated Intelligence Layer.** Avoid creating a fragmented "Franken-stack" of disparate AI tools. Make a strategic decision on whether your CRM or your SEP will serve as the primary system of intelligence and action for the sales team. Ensure your chosen platform has a robust integration marketplace to create a seamless flow of data and a unified user experience for your reps.
- **Prepare for a New Breed of Sales Professional.** The rise of AI agents will not eliminate the need for human sellers, but it will fundamentally change their role. Begin planning now to upskill your sales teams. The sales professional of the future will be a strategist, a skilled negotiator, and an orchestrator of AI agents, focusing their efforts on the high-value human interactions that AI cannot replicate.

Bottom Line

The Sales Enablement market has become the epicenter of AI-driven sales transformation. The introduction of Intelligent Sales Assistants was just the first wave of a much larger sea change. The arrival of autonomous, agentic AI will fundamentally restructure sales teams, redefine sales processes, and accelerate market consolidation. Enterprises that fail to adapt will face significant disadvantages in productivity and efficiency. Those that strategically embrace this shift—equipping their teams with assistants, deploying AI agents, and evolving the role of their sellers—will gain a significant and sustainable competitive advantage in revenue generation.

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*