

# The Aragon Research Globe™ for Sales Enablement Platforms, 2021

Enabling Selling In a Post-Pandemic Economy

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June 16, 2021 | Research Note 2021-21v

**Author:** Jim Lundy

**Video Producer:** Adam Pease

**Topic:** Sales enablement

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



## SUMMARY

Aragon's fourth Aragon Research Globe™ for sales enablement platforms examines 14 major providers in a market category that has become the de facto digital work hub for sales professionals. While the market is still split between sales content automation and sales communications, the market is shifting to become more intelligent via AI.

[Watch the Visual Research in AIN.](#)

**TABLE OF CONTENTS**

Introduction .....	3
Market Growth Attracts Larger Enterprises .....	3
The SEP Formula for Success: Automation Delivers Productivity: Putting an SEP to Work .....	4
Sales Communications: Email, Voice, Messaging, and Sequences .....	6
The Need for Conversational Intelligence .....	7
Proposal and Content Automation—The New Normal .....	7
The Need for More Video Content .....	7
Deal Coaching and Guided Selling .....	8
The Race to Intelligent Sales Enablement.....	8
Bigger Is Better? SEPs and Sales Coaching and Learning.....	8
Sales Enablement Platform Market and Capabilities Overview .....	10
Sales Communications and Engagement .....	10
Sales Content Automation .....	10
The Aragon Research Globe™ for Sales Enablement Platforms, 2021 .....	12
Leaders.....	13
Contenders.....	19
Innovators.....	21
Getting Started with Sales Enablement .....	27
Aragon Advisory .....	27
Bottom Line.....	27
Aragon Research Globe Overview .....	28
Dimensions of Analysis .....	28
The Four Sectors of the Globe.....	29
Inclusion Criteria.....	29

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## Introduction

The SEP market has grown substantially over the last six years. It is now a de facto part of the sales tech stack. While there is still a bifurcation in the market, in that there are content-focused providers and communication-focused ones, the market is now poised for the next part of its evolution—the shift to intelligence. This fourth Aragon Globe report evaluates 14 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 covers the technology providers that allow an enterprise to manage all aspects and touchpoints of the sales process. SEPs work in conjunction with CRM platforms to serve as a work hub for sales professionals. As with the digital work hub market, SEP providers offer two core sets of features:

**Sales Content Management and Automation**—manage and share content in a multitude of forms—text documents, presentations, and videos.

**Sales Communications**—organize cadences of communications with customers via email, phone, messaging, and video, and help them to understand engagement via advanced content analytics.

## Market Growth Attracts Larger Enterprises

SEPs have become a de facto part of the sales enablement stack. Small and large enterprises have realized that generic office tools do not provide the levels of productivity that sales teams need, nor do they interface with CRM platforms, which is critical. The market is shifting to one that is more intelligent with better capabilities to analyze what is happening in deals, by leveraging sophisticated analytics that can understand content engagement, communications intelligence, and take us to the next level, which is about guided selling (see the Shift to Intelligence section below).

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

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

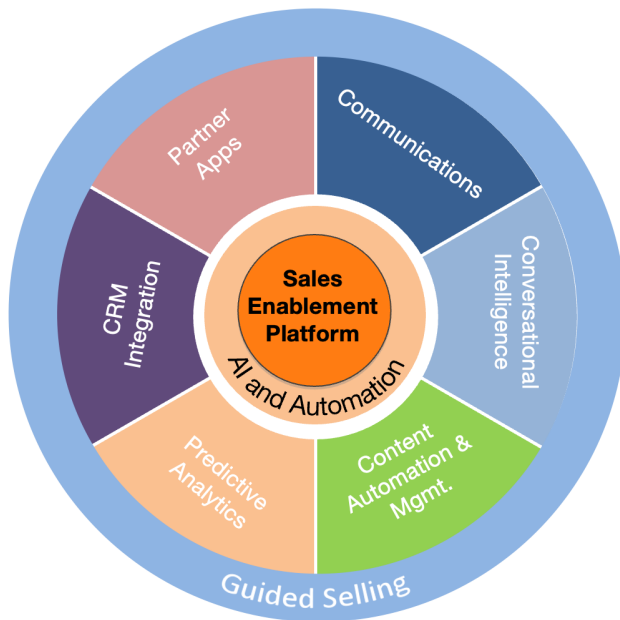
What enterprises need is a robust set of sophisticated tools in an all-in-one platform in order to engage with savvy customers, and to enable sharing of content and better

communications. Marketing is increasingly playing an active role in selecting and funding sales enablement platforms.

### **The SEP Formula for Success: Automation Delivers Productivity: Putting an SEP to Work**

The key justification for buying any SEP is that it needs to add value from the day the installation is complete, and sales teams must know how to use it. As a vertically-focused digital work hub, SEPs are all about automation.

It starts with automating the selection of content to share at different phases of a sale and also providing playbooks and scripts that tell reps what to say and went to say it. It isn't that everyone needs a script, but all sales managers know that different sales professionals have different skillsets and playbooks help to serve as a reminder of the best practices that can get them the success that they desire.



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

The need to automate repetitive sales processes is one of the key reasons to invest in an SEP. Prospects need to have a set number of touch-points before a deal closes. This involves communications, meetings, and content.

The success of SEPs as one of the first integrated digital work hubs has also led to the growth of a separate horizontal market. Work hubs help individuals manage work as well as teams and groups. Work and the workplace are changing for professionals who use specialized

knowledge to solve problems. These “knowledge workers” use intellectual capital to create competitive advantage and value.

There are a number of key capabilities that make sales enablement platforms a fully functional digital work hub for sales. As shown in Figure 2, we rate SEPs as an advanced form of digital work hub.

For horizontal work, communications, and content management, most organizations require sharing content within and among teams, as well as with customers and partners in the enterprise ecosystem. Sales enablement platforms are one of the clearest examples of a role-specific digital work hub. The reason why these platforms are so valuable is that they offer the potential to eliminate the fractured state of sales tools and provide a complete digital selling environment, equipped with key capabilities such as advanced content analytics.

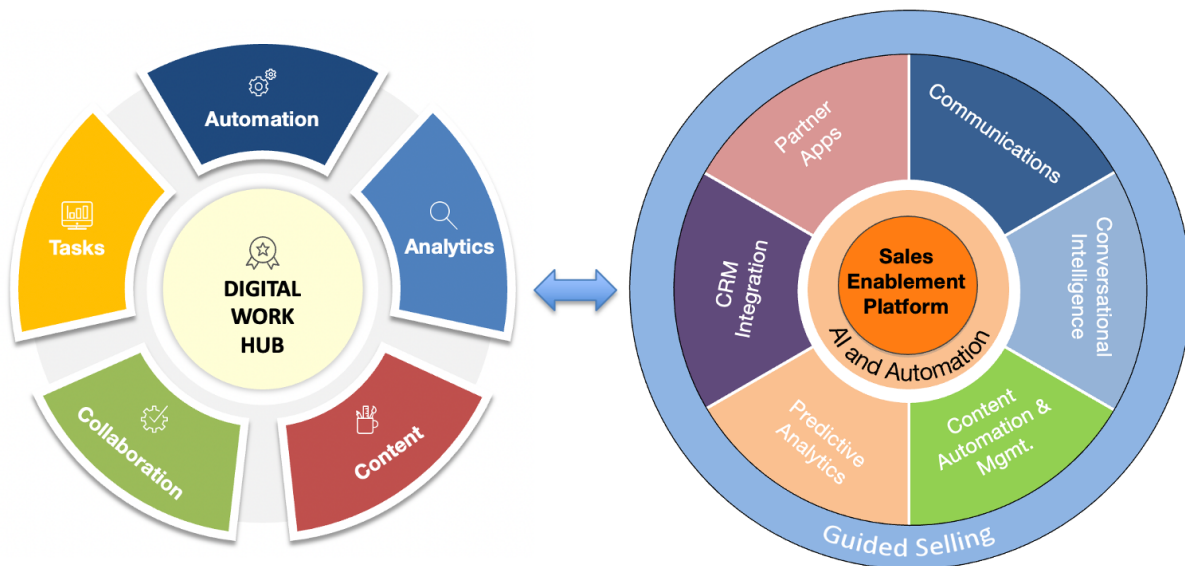


Figure 2: Sales enablement platforms focus on customer engagement while horizontal work hubs focus on getting work done internally.

Some of the capabilities that make SEPs unique include:

- **Advanced content analytics.** Most providers can tell a sales representative what content is working well. In a specific deal, content analytics provides real-time analysis of what content (and what pages/slides) are being viewed. Additionally, some providers offer analytics on voice conversations that can reveal patterns in talk time and engagement.

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- *Automatic logging of calls, emails, and engagement.* While many SEP providers can automatically update the CRM regarding emails and activities, some do it better than others. Many also do not update contacts.
  - *Multi-channel communications.* Engage with prospects using the right communication channel at the right time. Some providers focus on communications, including Outreach, ringDNA, SalesLoft, and VanillaSoft.
  - *Task automation.* This can include sending emails, automating calls, and scheduling future appointments. Automating engagement represents one of the biggest areas of opportunity.

### **Sales Communications: Email, Voice, Messaging, and Sequences**

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

While CRM providers such as Salesforce offer high-velocity selling as a module, in many cases, enterprises are opting for best-of-breed sales communications providers, such as Outreach, SalesLoft, ringDNA, and VanillaSoft.

Communications is critical to sales success and that means using email, chat/SMS, and phone calls in the right combination for the right account. Today, texting is just another channel, and it is vital to have alongside email and voice calls. Automating many of the manual tasks involved in the sales process—including emails and phone calls—is one of the things that SEP providers do well. Mobile messaging is another key component to a successful SEP and is an area that most providers still need to invest in.

Given that the full suite offering is still emerging, it is not uncommon for an organization to have more than one SEP. Aragon still expects to see consolidation in this space, and just as most SEP providers offer email capabilities, we expect they will add more messaging interactions over time. This need for a complete platform—complete with the sales communications technologies needed by sales professionals—will eventually drive market consolidation.

## **The Need for Conversational Intelligence**

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

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

## **Proposal and Content Automation—The New Normal**

Content automation has become a core part of sales content management. The reason for this is that sales professionals spend an exceptional amount of time dealing with content. SEPs that have workflow and content automation capabilities can automate workflows and produce intelligent documents with valuable process analytics that make businesses more productive and intelligent. Speeding up the productivity of sales teams is a game changer, and more and more providers are offering these kinds of capabilities. Salespeople who can use their SEP to auto-generate proposals can save 1-2 hours of time a day.

Many enterprises today have a separate content automation or configure price quote (CPQ) offerings. Aragon suggests that for proposals and even contracts that sales enablement platforms are up to the task and should be evaluated on the robustness of their content automation capabilities.

## **The Need for More Video Content**

Being able to share videos with customers and prospects is key, as it can ensure higher levels of engagement, which often leads to higher sales. Statistics have shown that 80% of all prospects will open a piece of video content but ignore any other type of content. This compelling use case for the top of the funnel demands that more SEP providers are able to do more with video.

Sales operations organizations need to embrace video and also inspect their providers to make sure they can load and deliver video content just as seamlessly as they can deliver PDFs to a prospect. In fact, Aragon suggests that sales organizations test the effectiveness of video when they are piloting sales enablement platforms that they are making a selection on.

Of the providers in this report, Bigtincan, Pitcher, and vablet offer strong video capabilities that others should look to emulate.

## Deal Coaching and Guided Selling

Customer revenue optimization is about digitizing analog sales methodologies. In many cases, CRO guides the rep, but doesn't always guide the manager. This is why deal coaching is also important for managers to understand; look for providers that offer this set of capabilities. Today, the CRO market is really best-of-breed, and it integrates with sales enablement and CRM providers but is generally separate from the SEP.

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

## The Race to Intelligent Sales Enablement

While content analytics has been around for a long time, we see a shift in the overall market, which we would call Part Two of sales enablement, which is all about an intelligent platform that recognizes what is happening and provides input and guidance to sales reps and managers about the right content to share, the fixed and dynamic sales playbooks, as well as guidance for reps and managers on what to do at each stage of a deal. Today, most providers do not offer guided selling, but they are adding more intelligence, such as the conversational intelligence mentioned above. However, we feel that due to increased use of machine and deep learning, sales enablement platforms will continue to get smarter.

**Prediction:** by YE 2024, 50% of the SEP providers will add real-time AI-based intelligence to their platforms (75% probability).

## Bigger Is Better? SEPs and Sales Coaching and Learning

Aragon's perspective is that sales training is still an independent function from sales enablement, but it does tie to the overall need for onboarding and training. A number of the providers in this report offer both an SEP and a sales coaching and learning offering.

There are a number of modules that Aragon feels that sales coaching and learning should include. It is not just about the ability to create content, such as microlearning objects. It is also about roleplays, skills, and coaching/mentoring. Many of the providers that have SCL capabilities are included in our Aragon Research Globe™ for Sales Coaching and Learning.

In 2020, providers such as Outreach, Highspot, and vablet added sales coaching and learning to their platforms. The additional SEP providers that offer SCL include Bigtincan, Brainshark, Pitcher, SalesHood, and Showpad.



One of the reasons that delivering on the promise of sales coaching and learning is hard is because delivering training requires content and not all SEP/SCL providers offer training content.

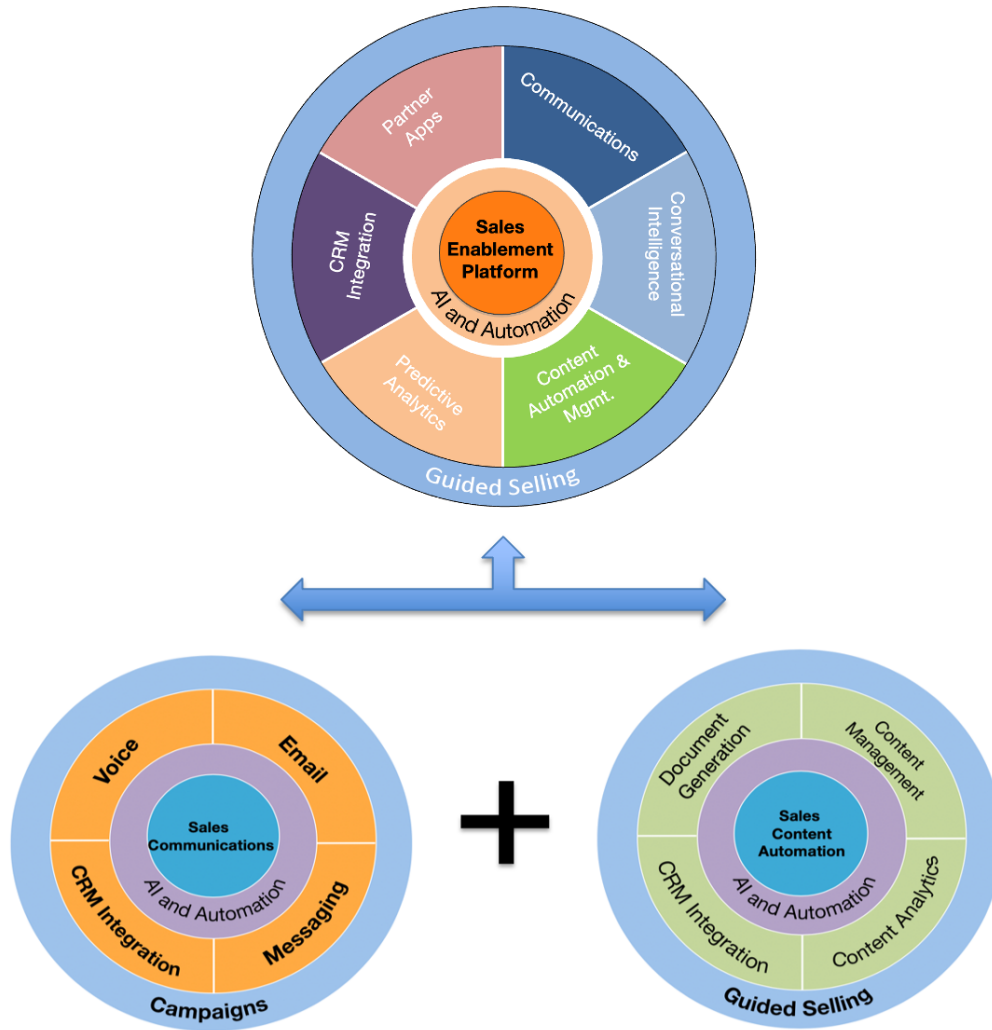


Figure 3: Sales enablement platform providers tend to focus on sales communications or sales content automation.

## Sales Enablement Platform Market and Capabilities Overview

The proliferation of disconnected sales enablement apps and the existence of too many app categories were two catalysts that led to the emergence of the sales enablement platform market. Today, the market exists with two different types of sales work hubs. A number of SEP providers focus on sales communications as their lead set of capabilities (see Figure 3 above).

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

### Sales Communications and Engagement

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

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

### Sales Content Automation

Many of the providers in this report focus on sales content and what Aragon is now calling sales content

#### Note 1: The summary of the key capabilities of SEP offerings

##### Sales Content Creation

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

##### Sales Content Automation

- Manage and recommend content.
- Store content natively or on 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 also 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 also 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.

##### Optional: Sales Coaching and Learning

automation. Content is often shared to close a deal. The analytics of what is happening with that content is often key to making a deal happen faster.

As mentioned above, providers vary in offering all of the capabilities described below. In many cases, this means that an enterprise may buy from two providers due to the need to have sales communications and sales content automation. Aragon feels that enterprises need to have an architecture for their overall approach to sales enablement (see Table 1).

Table 1 below summarizes the capabilities by provider.

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

Table 1: The summary of key capabilities by provider.

**The Aragon Research Globe™ for Sales Enablement Platforms, 2021**  
(As of 6/16/21)

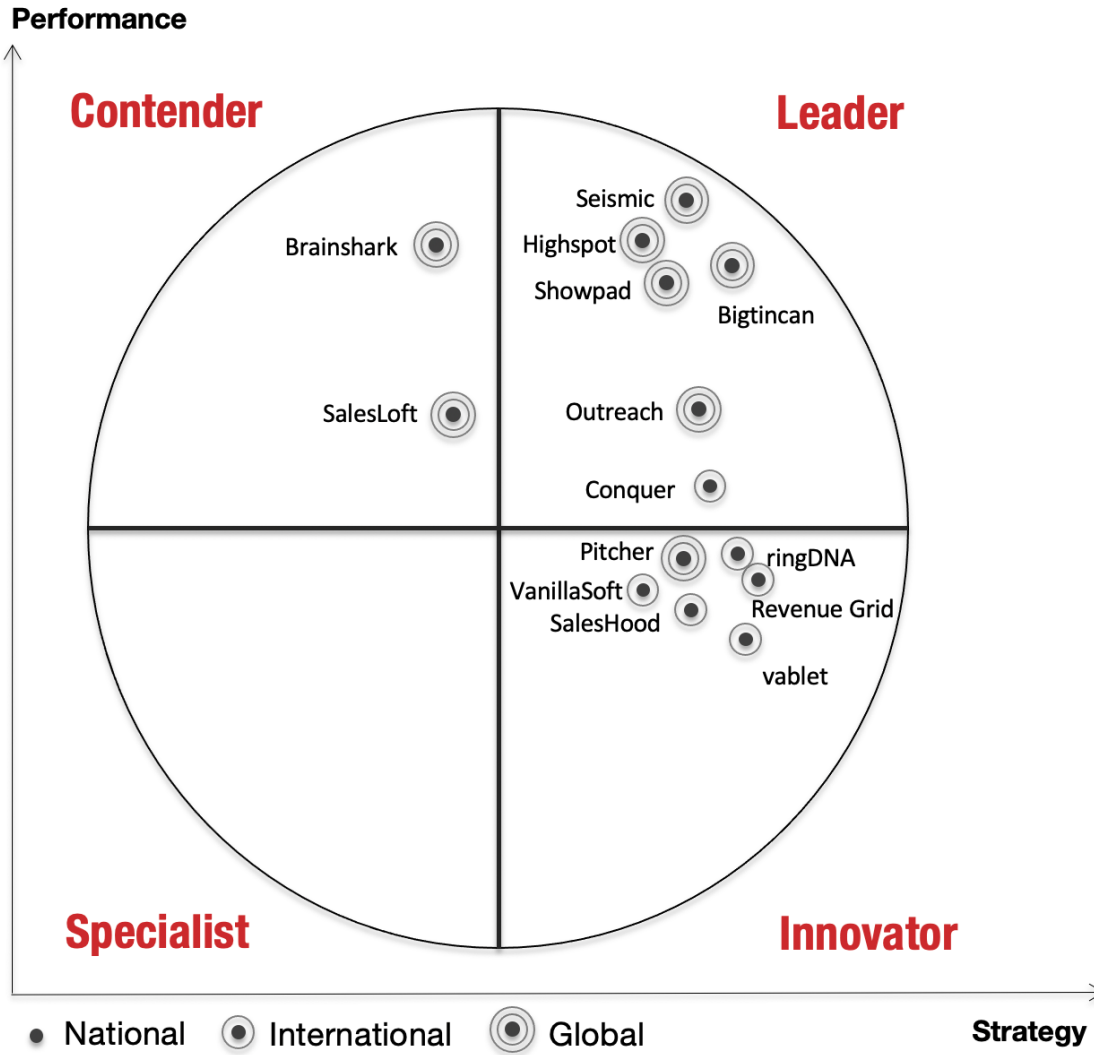


Figure 4: The Aragon Research Globe for Sales Enablement Platforms, 2021.

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## Leaders

### **Bigtincan**

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Bigtincan, led by CEO David Keane, offers a full SEP platform that includes sales coaching and learning as well as conversational intelligence. Bigtincan has grown through a combination of direct go-to-market as well as an expanded acquisition strategy. It is doing acquisitions focused on innovation and it is not slowing down with 9 acquisitions to date. Two of its most recent include ClearSlide, which had a significant install base, and VoiceVibes, which brings conversational intelligence to Bigtincan.

Bigtincan offers full mobile-first content management automation, as well as sales coaching and learning—Bigtincan Learning. With ClearSlide and VoiceVibes, Bigtincan now offers a robust set of sales communications capabilities, including conversational intelligence.

Bigtincan Hub provides instant access to sales content, microlearning, video coaching, document automation, and internal communications for both sales and services use cases. The Hub functions seamlessly on iOS, Android, and Windows devices online or offline. Bigtincan offers even more advanced user engagement analytics from the ClearSlide acquisition.

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

#### Strengths

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

#### Challenges

- Balancing the growing number of product lines

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## Conquer

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Conquer, formerly known as DialSource, focuses on sales communications and overall engagement. 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.

It does this by offering a native CRM application (managed package) as well as telephony infrastructure that enables omni-channel capabilities inside both Salesforce and Microsoft Dynamics 365 ecosystems.

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

More recently, Conquer has added guided selling capabilities to expand its product offering. 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 works natively within Salesforce and Microsoft Dynamics 365 to connect engagement to current sales processes. Conquer also can make sure that a rep does not over-communicate or spam a prospect, via its configurable compliance tools.

### **Strengths**

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

### **Challenges**

- Market awareness outside of the U.S.

## Highspot

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Highspot has continued to grow organically, leveraging its large set of investments, including its E round of \$200M, bringing its total fundraising to date of over \$400M. Highspot offers a complete SEP offering that features an intuitive user interface and seamless integrations, including with Office 365 and G-Suite, which enable native and on-the-fly editing of documents.

In February 2021, Highspot repositioned itself, calling its new offering a unified sales enablement platform. The key additions included adding a new sales coaching and learning to its offering, as well as enhanced analytics via Scorecards, upgraded security, and content governance. Highspot also made additional releases in 2020 that included an upgraded iOS and Android mobile app with offline search, better content personalization, and enhanced reports and analytics.

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.

### **Strengths**

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

### **Challenges**

- Awareness outside of U.S.

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## Outreach

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Outreach continues to offer its SEP platform that focuses on sales communications and engagement. In June 2020, Outreach closed an additional \$50M round of funding. This comes on the heels of its \$119M Round E in 2019. Today, Outreach has expanded its offerings to cover the entire revenue organization, from reps to the CRO. Beyond the Outreach Sequence, which leverages a series of touch points to help reps connect with buyers, Outreach now offers a unified engagement and intelligence platform, one that automatically captures buyer activity and sentiment data and eliminates the need for multiple disparate point solutions. Armed with buyer behavioral data, reps can better understand next best actions to take while marketing, and sales leaders can better understand enablement content performance and pipeline and forecast efficacy.

Outreach recently launched three new tools to expand its platform capabilities.

- Outreach Kaia, a voice-and video-enabled virtual sales assistant, surfaces relevant enablement content based on real-time buyer prompts. Kaia's *in-the-moment* coaching allows sellers to answer complicated product or solution questions on the spot.
- Outreach Insights, an integrated reporting and buyer sentiment analytics functionality that helps sellers better understand the level of interest a prospect or customer has in engaging in a sales conversation.
- Outreach Success Plans, which helps buy-side and sell-side teams co-create action plans to stay on task to reach mutually agreed upon business outcomes.

### **Strengths**

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

### **Challenges**

- Content management capabilities



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## Seismic

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Seismic has continued to grow organically, and given its revenue and global footprint, it is well positioned for an IPO in the next twelve months. The Seismic Storytelling Platform offers rich content experiences that help sales teams connect with buyers. New in 2021 includes Smart Plays, dynamic email templates, and new global privacy management.

In December 2020, Seismic acquired social selling provider Grapevine6 and has renamed the offering Seismic LiveSocial. LiveSocial allows sellers to engage their target audience by sharing pre-approved content from over 11,000 publishers across multiple languages. LiveSocial integrates with social media platforms such as Facebook, LinkedIn, and Twitter.

Seismic is fully integrated into Salesforce and also works seamlessly with Slack and email clients. The summer 2021 release of Seismic includes refined content recommendations from Seismic Aura. Based on its 2019 acquisition of Percolate, Seismic offers a robust set of content marketing capabilities to help marketers leverage their content marketing in the best possible fashion. It also added Interactive Content last year to help sellers stand out with immersive, choose-your-own-adventure style presentations that allow the audience to drive the conversation. Seismic helped to pioneer the content automation part of sales enablement with its LiveDocs functionality that enables documents to be customized for prospects and clients on-the-fly.

### **Strengths**

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

### **Challenges**

- Awareness in APAC

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## Showpad

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Showpad, with an established presence in the U.S. and Europe, continues to offer its sales enablement platform, along with its coaching and learning solution—Showpad Coach. In March 2021, Showpad announced a number of new executives that joined the company in sales, marketing, and HR leadership positions. Showpad is innovating with its Conversational Intelligence offering that allows reps and managers to gain insights on conversations during calls.

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

The Spring 2021 releases added the ability to create custom home pages, accelerated course creation, enabled shareable video meeting ‘snippets,’ added greater augmented reality and VR support, and added enhancements to customize search options. Showpad is also optimized for web or mobile device access and historically has offered a strong mobile-first experience for salespeople on the go. Along with its strengths in content creation and the ability to update content for everyone, Showpad integrates CRM systems such as Salesforce and Microsoft Dynamics, 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**

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

### **Challenges**

- Balancing focus on sales enablement and training

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## Contenders

### **Brainshark**

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Brainshark, which focuses on sales content management and sales coaching and learning, has continued to see strong adoption of its platform. Brainshark makes it easy for sales enablement and marketing to take existing content, such as Microsoft PowerPoints or screen recordings, and add voice-over narration. The resulting presentation can be shared and tracked by sales reps. Part of Brainshark's authoring tool is the ability to create a video of the sales rep to share with a prospect or a customer. New in 2020 were the sales CRM Readiness Scorecards that help sales team reps and managers track and visualize sales learning and coaching activities alongside sales KPIs from Salesforce with a quick view of overall readiness and drilldowns by topics.

One of Brainshark's strong suits is video coaching. It allows sales enablement to reinforce and assess that sales reps have retained critical information, and Brainshark's AI-powered engine saves time and simplifies the review process for sales managers and sales teams to onboard new team members quickly by leveraging custom developed content alongside video coaching courses. In 2021, Brainshark announced new partnerships with sales methodology vendors Value Selling Associates, Sandler Training, and Challenger, as well as with training content providers including 2Win! and Go1. Go1 provides a curated library of courses from Sandler training, Skillsoft, and others. Additionally, Brainshark now partners with SEP providers, such as Highspot and Seismic. Brainshark can run natively in Salesforce CRM and is integrated with Microsoft Dynamics 365.

#### **Strengths**

- Onboarding and learning
- Ease of use
- Content analytics
- Salesforce and Outlook integrations
- Content creation and sharing
- Video coaching and practice

#### **Challenges**

- Focus outside of sales coaching and learning

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## SalesLoft

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SalesLoft, led by founder & CEO Kyle Porter, continues to focus on sales engagement. The SalesLoft platform offers sales communications, conversational intelligence, analytics, guided selling, deal management, pipeline management, and sales coaching. SalesLoft enables workflow and communications for the entire revenue team via email, phone, social, and SMS texting.

SalesLoft enhanced its Sales Cadence capabilities in March 2021 to include cadence templates informed by 1B sales interactions. Other new features include improved analytics and its new deal engagement scores.

SalesLoft integrates with industry-leading CRMs (Salesforce, MS Dynamics, and HubSpot), eliminating the need for revenue team members to manually enter data. Real-time reporting on rep activities—embedded into SalesLoft team and cadence performance and integrated into CRM or APIs to export into data intelligence platforms—can connect activities with revenue outcomes.

SalesLoft has a growing number of partner integrations, including content management (Seismic, Highspot), Slack, LinkedIn, G-suite, Microsoft Outlook, CRM (Salesforce, MS Dynamics, HubSpot), and video providers (Vidyard, VidGrid, Videolicious.) With its new Cadence templates, improved analytics, and deal engagement score capabilities, SalesLoft is well positioned to meet the sales engagement needs of the global enterprise.

### Strengths

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

### Challenges

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

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## Innovators

### **Pitcher**

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Pitcher repositioned its offering and now offers a Super App for sales enablement. Due to its mobile-first approach, Pitcher is ideal for hybrid work environments. It offers sales content management and automation, multi-channel engagement, guided selling order and sample management, as well as coaching and analytics. Pitcher integrates with Salesforce, SAP C4/HANA, Oracle Sales Cloud, and MS Dynamics and its mobile-first applications are available for Apple iOS, Google Android, and Windows.

Pitcher continues to partner with Salesforce as an alternative to Veeva Systems in Life Sciences. Other industries that Pitcher focuses on include consumer goods, manufacturing, and financial services. In July 2020, Pitcher announced that its App was available for trial and purchase in the SAP App Center, which is where partner apps are offered to SAP customers.

Via its Super App, Pitcher is providing a complete work hub for sales reps—ranging from offline CRM access to dynamically adapted presentations, from order capture to coaching, and from remote presentations. One of the core focuses of Pitcher is a holistic view on the sales rep in hybrid work scenarios—whether they in the field, at home, or back at the office.

#### Strengths

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

#### Challenges

- Market awareness in U.S.

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## Revenue Grid

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Revenue Grid, led by CEO Vlad Voskresensky, focuses on intelligent sales enablement, and offers an SEP with powerful guided selling. Guided selling from Revenue Grid starts from intuitive dashboards that provide real-time visibility of the progress and status of each deal in the pipeline and make it easy to navigate each deal's engagement timeline, relationship intelligence, and other related information. As deals progress, deal health is monitored with AI and deals ranked "at risk" are immediately brought to the attention of the sales rep and manager, with AI-based suggestions of actions to improve the situation.

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

Revenue Grid's quarterly updates continuously grow the offering with broader analytics, new integrations, and new AI capabilities. Its many integrations and automatic data collection mean that it uses far more reliable data to drive its intelligence and can respond to the sales process in real time.

### Strengths

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

### Challenges

- Market awareness

## ringDNA

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ringDNA, led by Founder and CEO Howard Brown, continues to focus on sales communications, sales acceleration, and conversational intelligence. Its last funding round of \$30 million came in 2018. Since then, ringDNA has doubled down on ConversationAI, its conversational AI offering, by allowing teams to organize calls into libraries to help to improve coaching. The ringDNA mobile app allows sales reps to gain insights right from their phone, making it ideal for hybrid work scenarios. ringDNA allows for high velocity dialing from anywhere within Salesforce CRM.

Leveraging more of its overall sales intelligence, ringDNA can now offer enterprises full guided selling, which more enterprises want to enable. Its built-in sales cadence solution, Sequence, makes it ideal for sales teams to know who to reach out to and what they should be discussing. Part of the success of Sequence is also due to the auto activity logging that is part of ringDNA. With ringDNA's focus on automation and intelligence, it is helping to increase productivity of sales teams when it comes to sales communications.

### **Strengths**

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

### **Challenges**

- Market awareness outside of the U.S.

## SalesHood

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SalesHood, based in San Francisco, continues to focus on executing its vision of an all-in-one sales enablement platform, purpose-built to drive revenue outcomes. The SalesHood platform enables revenue teams to boost sales productivity with just-in-time learning, prescriptive coaching, guided selling, and performance correlations. In addition to modern learning, SalesHood enables the delivery of branded content, videos, and files to revenue teams, partners, and customers with Buyer Sites.

In 2020, SalesHood released new performance analytics innovations with its Correlation Engine for Salesforce and no-code required integrations with leading business intelligence platforms like Tableau, PowerBI, GoodData, and Domo. SalesHood also launched a sales kickoff automation solution, SKOx, ideal for remote SKOs. Another big push for SalesHood was around manager enablement and the release of the Coaching Command Center to streamline remote sales coaching for front-line managers. SalesHood announced a partnership with Winning By Design and the two firms together launched an on-demand coaching membership—Remote Selling Mastery.

### **Strengths**

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

### **Challenges**

- Market awareness



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## vablet

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vablet, based in Irvine, CA and led by CEO Paul Pacun, offers both a web- and mobile-first sales enablement platform. In 2021, vablet added sales coaching and learning to its portfolio. One of the features that stands out for vablet is its ability to access content on-the-go, including accessing it offline, which is important for the mobile sales professional. vablet can be deployed on iOS (iPhone or iPads), Windows devices—such as the Surface—and browsers. vablet excels at content sharing, particularly media including video, rich-media, and interactive presentations. vablet also includes strong forms capabilities, making it ideal for kiosk and other self-serve applications.

vablet provides advanced content management features including the ability to push new content to devices with full tracking capabilities and full offline access. Enterprises also like the native integrations with cloud content management providers, such as Box, Dropbox, Google Drive, Microsoft SharePoint, Hyland OnBase, and Oracle PLM.

vablet is winning customers in life sciences and has added financial services and medical devices as focus areas as well. vablet's form building tool also makes it ideal for data capture for reps on-the-go. vablet's extensive content capabilities, including rich media and video, along with offline access to that content, are one of the reasons it is winning new customers.

### **Strengths**

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

### **Challenges**

- Market awareness

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## VanillaSoft

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VanillaSoft offers a sales enablement platform and is focused on the SMB market. In October 2020, VanillaSoft announced that it acquired Autoklose, which offers email automation and sales intelligence capabilities. VanillaSoft leads with sales communications, and core capabilities include voice, email, and SMS messaging, as well as an autodialer, scripting, and lead routing capabilities. The addition of Autoklose also provides VanillaSoft with solid communications cadence capabilities. The growth of team collaboration and comfort level with messaging positions VanillaSoft well, as it has been offering mobile messaging for several years. VanillaSoft's scripting tool allows a sales rep or agent to adapt the conversation on the fly, which will help both new and experienced sales reps.

VanillaSoft has been building its install base and has solutions for inside sales, higher education fundraising, hospitality, insurance, banking, and finance. VanillaSoft's appointment setting capability, which includes proximity booking, can help to maximize the appointment setting and scheduling process. Lead scoring will help managers to prioritize sales rep activities. For SMBs, VanillaSoft's built-in CRM may offer an attractive alternative to Salesforce and Dynamics.

### Strengths

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

### Challenges

- Market awareness

## Getting Started with Sales Enablement

In a world where hybrid work and remote sales calls is the new reality, sales enablement platforms are vital to gain critical insights into the state of engagement with prospects and customers. The insights that SEPs deliver to sales teams and managers helps them to make decisions on the deals that they want to spend time on based on engagement feedback. Because the level of analytics and insights varies widely amongst providers, Aragon recommends evaluating providers and conducting a pilot program that leads to a full sales organization rollout.

Sales enablement platforms are a role-based digital work hub that offer quick paybacks in terms of both sales productivity and higher levels of engagement that lead to improved overall pipeline health. SEPs are basically part of the sales tech stack that has emerged. Enterprises that do not leverage an SEP face significant disadvantages over those that do.

### Aragon Advisory

- Enterprises should look at sales enablement platforms as a must-have for any sales organization. Because the market has been around for more than seven years, it has now become a replacement market as enterprises continue to grow and look for more capabilities.
- The shift to intelligent sales enablement platforms is here. Because of the differences amongst providers, it will be important to understand their current and future capabilities by asking to see product roadmaps.
- Enterprises need to realize they may need both sales content management and sales communications for different parts of the organization. Sales communications is often used by inside sales teams.
- Many sales organizations have migrated to mobile tablets as their only compute platform. This may limit the number of providers that can operate effectively on those devices.

### Bottom Line

Sales enablement platforms are getting smarter, and this represents what Aragon calls Phase Two of the market maturity. While some enterprises have had SEPs for years, many are now just realizing that Microsoft Office is not enough for a sales team to be truly effective in engaging with prospects and customers. The world of digital selling is now remote, and that is the battle-cry for more technology for sales organizations. SEPs are a must-have component for all sales teams.

## Aragon Research Globe Overview

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

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

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

## Dimensions of Analysis

The following parameters are tracked in this analysis:

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

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

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

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

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

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

The market reach evaluation includes:

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

### The Four Sectors of the Globe

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

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

### Inclusion Criteria

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

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

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process. This determination was applied to Journey Sales, who declined to participate in the Aragon Research Globe process.

**Noteworthy Vendors Not Included In this Report:**

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

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