



## The Aragon Research Globe™ for Sales Enablement Platforms, 2020

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The Race to Win the Customer

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**Topic:** Sales and Marketing

**Issue:** Who are the sales and marketing providers and how are they evolving?

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### SUMMARY

Aragon Research releases its third Aragon Research Globe™ for Sales Enablement Platforms. It examines 17 providers in a market category that has become a must-have work platform for sales professionals as it enables them to share content and communicate with prospects and customers in a more streamlined and automated fashion.

**TABLE OF CONTENTS**

Introduction .....	3
Market Growth Attracts Larger Enterprises .....	3
Figure 1: Digital Work Hubs and Sales Enablement Platforms.....	4
SEPs and Sales Coaching and Learning .....	7
Figure 2: Sales Communications vs. Sales Content Automation.....	7
Sales Enablement Platform Market and Capabilities Overview .....	8
Figure 3: Sales Enablement Platform Architecture.....	9
Aragon Research Globe Overview .....	11
Dimensions of Analysis.....	11
The Four Sectors of the Globe .....	12
Inclusion Criteria .....	13
The Aragon Research Globe for Sales Enablement Platforms, 2020 .....	14
Leaders .....	15
Contenders .....	22
Innovators .....	24
Specialists.....	31
Getting Started with Sales Enablement .....	32
Aragon Advisory .....	32
Bottom Line .....	32

## **Introduction**

The need for sales tools has never been greater than today. Sales enablement platforms (SEPs), which combine sales content management and sales communications into one platform, have become the new digital work hub for sales teams. Since Aragon first identified and quantified the SEP market in 2016, adoption has soared and SEPs represent the go-to way to get work done and to engage with prospects and customers.

SEPs originated due to the need to condense all of the digital tools a sales professional needs into one platform. Because CRM offerings serve as a system of record but not as a system of engagement, there needed to be something more. Enter SEPs.

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. These providers allow sales professionals to manage and share content in a multitude of forms. They enable them to communicate with customers via email, phone, messaging, and video, and help them to understand engagement via advanced content analytics.

## **Market Growth Attracts Larger Enterprises**

We have seen a significant uptick in purchasing activity due to the recognition of the SEP category. SEPs represent the new tech stack in sales. As in 2017 and 2018, we saw continued growth of the market in 2019 as more enterprises deployed SEPs for the first time. The market for sales enablement continues to grow as the demand for sales enablement platforms continues to expand. Just as the marketing tech stack grew and matured as marketers saw the need for more than just two technologies, today, sales operations and enablement teams, which often report to the chief revenue officer, are realizing that they need more than the standard office suite bundled with CRM.

What they 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**

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 1, we rate SEPs as an advanced form of a digital work hub.

For horizontal work, communications and content management in most organizations requires 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.

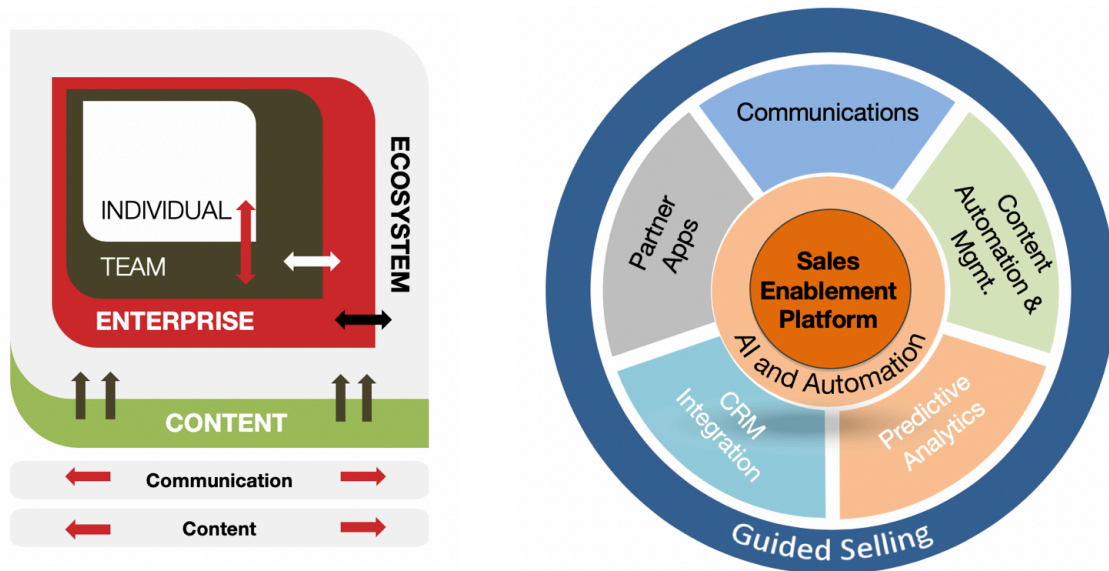


Figure 1: Sales enablement platforms focus on customer engagement while horizontal work hubs focus on getting work done internally.

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

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of what content (and what pages/slides) are being viewed. Additionally, some providers offer analytics on voice conversations that can reveal patterns in talk time and engagement.

- *Automatic logging of calls, emails, and engagement.* While many SEP providers can automatically update the CRM regarding emails and activities, some do it better than others. Many also do not update contacts.
- *Multi-channel communications.* Engage with prospects using the right communication channel at the right time. Some providers focus on communications, including DialSource, 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.

## **SMB vs. Enterprise Platforms**

First-generation SEP deployments have run their course and enterprises are looking for more sophisticated offerings that can be deployed across the enterprise. What works for a small or medium-sized business may not work for a large enterprise.

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

While much of the focus has been on sales content management, we have seen significant growth in sales communications over the last year. Not only is the focus on outbound calling and emailing, it is also about messaging. Providers such as DialSource are making it easy to do omni-channel communications—and messaging is one of the channels we expect to see more demand for. Today, it is still challenging to connect with a prospect or customer at the right time. Communications is critical to sales success and that means using email, chat/SMS, and phone calls in the right combination for the right account.

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.

## **SMS and Texting**

In 2018, a number of providers made the ability to text a prospect a standard feature. In 2019, texting is just another channel and it is vital to have alongside email and voice calls.

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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.

### **Mobile-First Sales Enablement Is Critical in Many Industries**

For sales and service reps on the go, the ability to use a sales enablement platform on a tablet or phone is mandatory. Providers like Bigtincan, Pitcher, Showpad, VanillaSoft, and vablet continue to see growing demand for mobile-first, tablet-enabled offerings.

Aragon feels that buyers should make mobile and tablet functionality a must-have requirement. The speed of access for people on-the-go and the point-and-click access provide better productivity for sales professionals.

### **Proposal and Content Automation Gets Added to the SEP Suite**

Workflow and content automation (WCA), first discussed in 2018 as a trend in sales, has now matured to become a desirable feature in an SEP. The reason for this is that sales professionals spend an exceptional amount of time dealing with content. SEPs that have WCA capabilities can automate workflows and produce intelligent documents with valuable process analytics that make businesses more productive and intelligent. The ability to automatically generate a document, also called document generation, is a game changer when it comes to sales productivity. Salespeople who can use their SEP to auto-generate proposals can save 1-2 hours of time a day.

Seismic was the pioneer in automating document generation and making it part of the SEP category. This is now a requirement for others. More providers, such as Bigtincan, Highspot, Pitcher, and vablet have added document generation to accelerate how quickly information flows between enterprises, people, and important business systems and to increase the accuracy of that information.

### **Video Content Is Underutilized**

While video is one of the top ways to engage with prospects, it is often not top of mind for sales teams. 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. Video needs to become a higher priority for the sales organization, but it is a challenge for sales enablement and marketing teams to facilitate this.

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



## Guided Selling Is Real

The automation of sales methodologies has emerged as a new category, which Aragon refers to as customer revenue optimization (CRO)—or guided selling for short. While some providers in SEP offer lightweight guided selling, selling methodologies are more complicated than suggesting a next step.

Aragon feels that basic recommendations are not enough. This means that SEP providers may end up partnering with emerging CRO providers, such as Upland Altify, ClosePlan, and Reveyg. Enterprises who don't currently have a sales methodology deployed should make this a goal for 2020.

## SEPs and Sales Coaching and Learning

In 2019, Aragon made sales coaching and learning (SCL) a breakout market from the legacy corporate learning market. SCL has seen strong growth as sales teams pivot from classroom training to a digital SCL offering.

While some SEP providers, such as Bigtincan, Brainshark, Pitcher, SalesHood, and Showpad offer SCL, there is a growing market of SCL providers that offer it as a standalone capability (see [The Aragon Research Tech Spectrum for Sales Coaching and Learning](#)).

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.

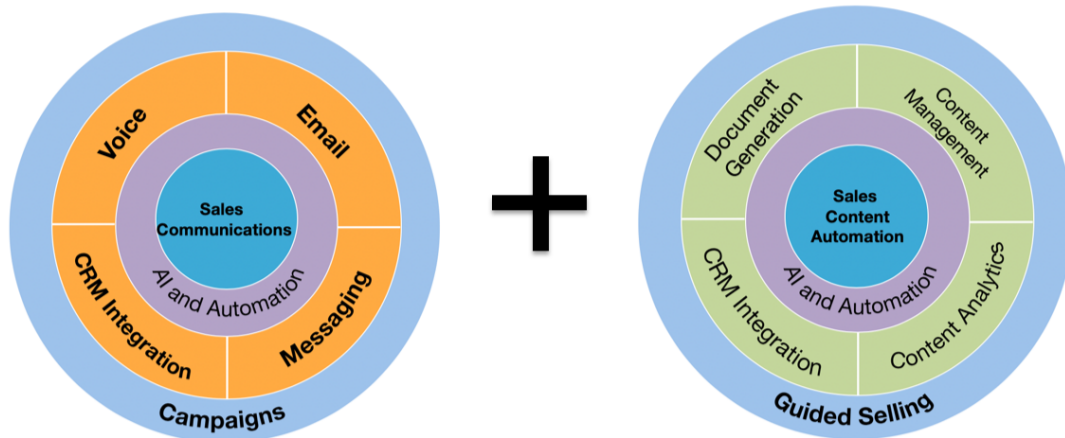


Figure 2: Sales enablement platform providers tend to focus on sales communications or sales content automation.

## **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 2 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 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 Figure 3).





Figure 3: This sales enablement platform architecture is a blueprint for what sales organizations should be looking for.

Sales enablement platforms feature six core capabilities:

- **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.
  - Some SEPs have native content editing, others integrate with Google G Suite or Microsoft Office 365.
  - New this year: more providers have native document generation to allow the automatic creation of proposals or contracts using customer and pricing data from the CRM platform.
- **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 create documents based on rules. This includes proposals and contracts. Most often, the document uses a template and customizes it based on the account or opportunity information that is in the CRM.
  
- **Communications**
  - 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.
  - Live pitch/presentation capabilities—**most often done via a mobile or web app, allowing a sale rep to share slides with a customer or prospect.**
  
- **Advanced Content Analytics**
  - The secret weapon in SEPs and other business applications is content analytics. Content analytics for documents is a core feature of an SEP. Increasingly, we expect to see analytics for images, voice, and video.
  - Engagement analytics—or what is happening with a prospect in real-time—is vital. The sales teams that are using engagement analytics are seeing a difference. Getting a notification that a prospect opened a presentation or looked at a pricing page is important to understanding where they are in the sales cycle.
  
- **Partner Applications (Apps)**
  - Partner applications are key components of a sales enablement platform. In a cloud-connected world, APIs are the gears and app stores are the way for buyers to select apps that add value to the core SEP.
  - SEP providers that enable partner apps will provide more value to buyers and also enable innovation. Today, learning is one of the apps that providers are partnering for.
  - Partner apps thus allow for customization in a controlled manner. Enterprises should look for SEP providers that have partner apps.
  
- **Guided Selling: Customer Revenue Optimization**
  - Guided selling is beginning to emerge as basic recommendations based on other behaviors.
  - AI-based guided selling emerged in 2019, but often SEP providers offer basic, next-step suggestions, rather than a full digitized sales methodology.

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- **Optional: Sales Coaching and Learning** (*note: this is an optional set of capabilities and was not used in the primary evaluation of SEP providers*)
    - Analytics
    - Coaching capabilities
    - Onboarding capabilities
    - Micro-learning (just-in-time delivery)
    - Regular course-based learning
    - Video role-play capabilities

## 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.

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- **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.

**New vendors in this year's report:**

- *DialSource*
- *Invisible*
- *RingDNA*

**Noteworthy vendors not included in this report:**

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

- *DealHub*
- *DocSend*
- *Olo*
- *Regalix*
- *Zoomifier*

The Aragon Research Globe™ for Sales Enablement Platforms, 2020  
(As of 2/06/20)

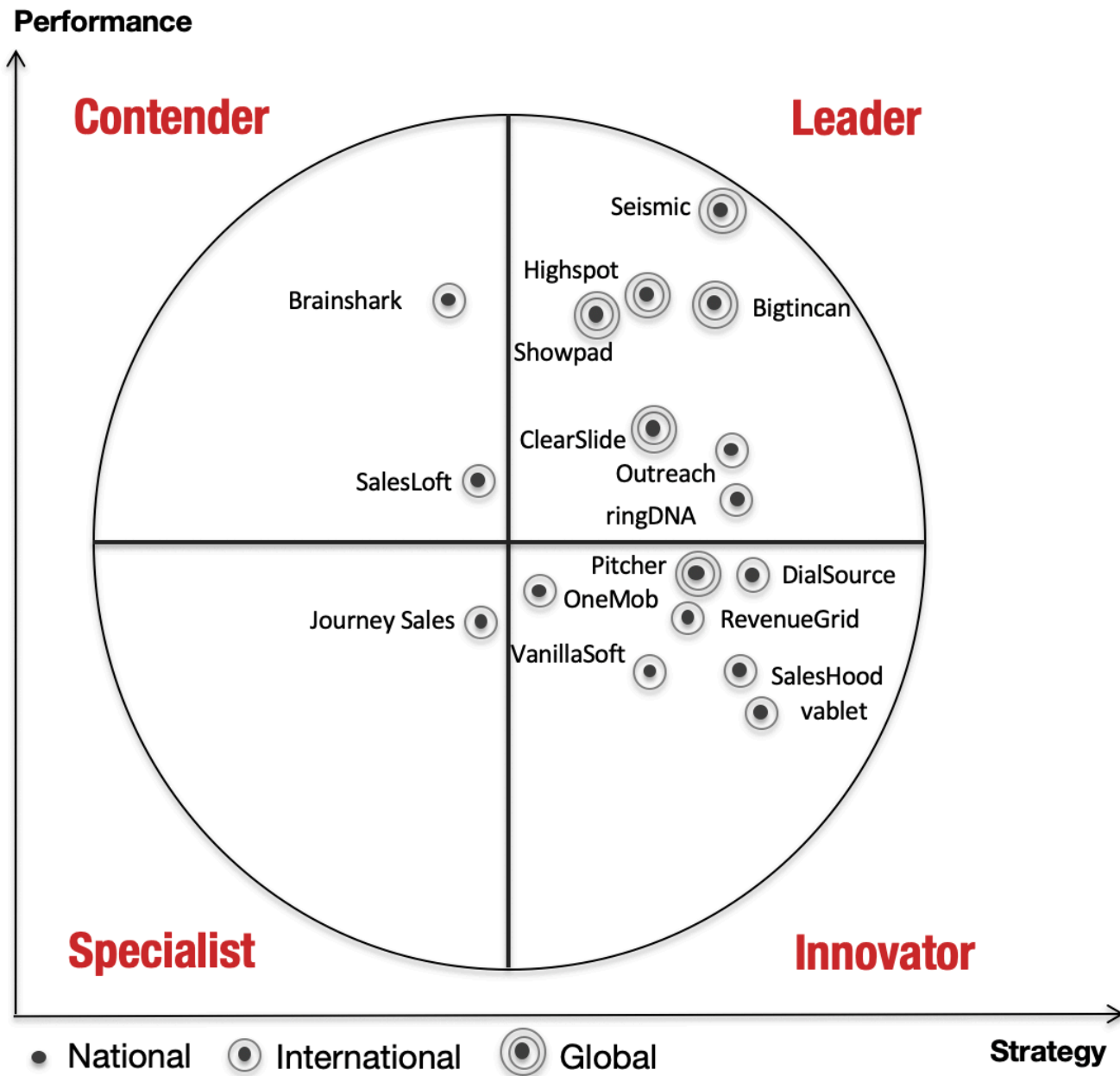


Figure 4: The Aragon Research Globe for Sales Enablement Platforms, 2020.

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## Leaders

### **Bigtincan**

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Bigtincan has continued to innovate its SEP platform through a combination of organic development and targeted acquisitions (5 in the last twelve months). Its most recent acquisition, XINN in September 2019, added intelligent document automation for rapid production of presentations and documents with less manual work. Enterprises use Bigtincan to mobilize, structure, and automate sales content management, skills training, and document creation in a single digital experience.

Bigtincan Hub is the core of the platform providing 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. That experience is mirrored to automatically display content at the opportunity stage in Salesforce.com and inside email such as Microsoft Outlook and Google Gmail.

Bigtincan focuses on producing ideal software for vertical-specific use cases with a large presence in traditional B2B markets (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
- 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

- Market awareness outside of the U.S.



## ClearSlide

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ClearSlide's parent company, Corel, was acquired by KKR in July 2019. ClearSlide continues to add capabilities to its platform that does both sales content and sales communications, including doing calls and live presentations via desktop browser and mobile app. ClearSlide has been known for its content analytics and in 2019, it enhanced the platform to make search easier. It has also added the ability for sales and marketing teams to launch automated email campaigns, flag underperforming content assets, and improve content discovery through peer review. As part of its sales communications offering, ClearSlide enables sales reps and managers to listen to recordings, enabling them to gain a deeper understanding of key things such as talk time, customer feedback, and also compare recordings with customer interaction data to find coaching opportunities. ClearSlide offers strong ease-of-use in creating custom presentations and personalized videos.

In July 2019, ClearSlide added IntelliSearch, an AI-powered tool that can scan content and look for titles, text, and other items such as tags to see if that content will be relevant for a particular deal. ClearSlide also recently added a spam checker so sales reps can understand if their email will actually get delivered. It is also in the process of updating its Gmail integration with the introduction of robust email tracking capabilities (including support for multiple recipient emails), enhanced email template and content sharing, and the ability to share automatic updates directly into CRM (including the creation of CRM contacts). With both sales content and sales communications, ClearSlide provides a complete sales enablement platform that can help drive sales productivity.

### Strengths

- Content creation, sharing, & management
- Ease of use
- AI-powered search
- Content and voice analytics
- Live presentation and monitoring
- Salesforce and Microsoft Dynamics integration

### Challenges

- Market awareness outside of North America

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## Highspot

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Highspot has continued to take investment and in December 2019, received a D round of U.S. \$75 million—bringing the level of investment to a total of \$200 million. Highspot continues to offer a complete SEP offering that features an intuitive user interface and seamless integrations, including with Office 365, which enables native and on-the-fly editing of documents. Highspot also partners for document generation capabilities and its semantic search makes it easier for sales reps to find the content they are looking for.

Highspot made its Smartpage technology generally available in September 2019, 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. The newly released capability SmartPages™ allows users to create dynamic and interactive pages.

### Strengths

- Analytics
- Content management
- Salesforce integration
- Office 365 integration
- Automated document generation
- Sales coaching and learning partners

### Challenges

- Awareness outside of U.S.

## Outreach

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Outreach offers an SEP that focuses on sales communications. Key capabilities include its ability to leverage communications in Sequences by leveraging calls, email, and SMS texts at the right time based on what channel will deliver a positive outcome. Outreach also recently secured a U.S. \$114 Million E Round of funding that brought the company's valuation up to \$1.1 billion in April 2019 to help continue to power its growth. It also enables the automated scheduling of meetings and integrates with Microsoft Office 365 and the Google Suite. In 2019, Outreach also announced a partnership with Seismic to enable joint go-to market.

One of the unique capabilities in Outreach are the sales intelligence tiles, which provides key engagement insights on customers and prospects and can save sales teams time doing research. In 2019, Outreach also enhanced Amplify, its embedded machine learning capability that identifies prospect intent and adjusts the next action based on what intent is discovered.

In addition, Outreach's platform protects data security while offering customizable governance for managers. The platform offers built-in "safeguards"—account, sequence, ownership, and content—to keep track of when and how prospects are contacted. Other features include customizable user profiles and team organization tools to help assign roles, compile teams, and support reporting and content sharing.

### **Strengths**

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

### **Challenges**

- Market awareness
- Content management capabilities

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## ringDNA

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ringDNA, based in Los Angeles and led by Founder & CEO Howard Brown, received its Series B funding round in October 2018. ringDNA has been quietly having success with a revenue acceleration platform that focus on sales communications, sales acceleration, and conversational intelligence. Integrating tightly with Salesforce CRM, the ringDNA platform is ideal for both inbound and outbound sales teams. It provides contextual information about a prospect who is on a call through its flagship Intelligent Dialer, and a range of solutions to better engage with these prospects, which makes it invaluable to providing enhanced customer engagement that helps reps close more deals faster.

The 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. Additionally, due to the built-in conversational intelligence solution, ConversationAI, calls that are best practices can be identified and highlighted to the rest of the sales organization. It also helps to automatically surface conversations where coaching it needed—based on its proprietary built-in AI—so that managers can know which reps need coaching as well as the part of a call that they need to focus on without having to listen to every single sales call.

### **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.

## Seismic

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Seismic has continued to grow and it has successfully migrated many of the customers it acquired from its 2018 acquisition of Savo. Seismic also raised U.S. \$100 Million in December 2018 which has allowed it to continue to expand its customer base and establish new offices and local leadership teams in Europe and the APAC region. With revenues in excess of \$100 Million, Seismic is the largest global SEP provider on the market that offers a full SEP. Seismic helped to pioneer content automation in sales and this feature is now becoming a mandatory part of a sales enablement platform.

Seismic makes it easy to access content from any device and from other applications such as Salesforce, Slack, and email clients. It also added AI-based enhancements to its content search functionality. In 2018, Seismic launched a new unified landing page for sales professionals, bringing the most relevant information from across the entire Seismic platform and consolidating it into a single page for quick, easy, and mobile access. In November 2019, Seismic also announced its acquisition of content marketing provider Percolate, which expands its overall content capabilities and further positions Seismic as a provider to both sales and marketing needs..

### Strengths

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

### Challenges

- Awareness in APAC

## Showpad

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Showpad continues to invest in its sales enablement platform, which offers both sales enablement and sales coaching and learning. Showpad Content allows content to be leveraged from existing content management and DAM platforms including Box, Bynder, Dropbox, Egnyte, Google Drive, Microsoft SharePoint, and Widen. Showpad also offers Shared Spaces, which enables seamless customer journeys via a more personalized and branded experience.

Showpad, which is optimized for web or mobile device access, offers advanced search functionality so content can be located quickly. This, combined with content analytics to show what content is performing and in what part of the funnel, helps to increase sales effectiveness and productivity. 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.

### **Strengths**

- Mobile experience
- Content analytics
- Content sharing
- Salesforce integration
- User interface

### **Challenges**

- Balancing focus on sales enablement and training

## Contenders

### **Brainshark**

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Brainshark continues to focus on both sales coaching and learning, where it leads, and on sales content management. Brainshark makes it easy for sales reps to enhance existing content by adding voiceovers to existing presentations such as Microsoft PowerPoint or Google Slides. The other compelling part of its authoring tool is the ability to create a video of the sales rep to share with a prospect or a customer.

Besides investing in content analytics and in its AI-powered engine for improving sales coaching, Brainshark has also focused on acquisitions. In 2019, it acquired Rekener to help it deliver scorecards to give sales leaders visibility into overall readiness of their teams. Brainshark's coaching technology provides an easy way for sales leaders to certify that their teams can apply training through video pitch practice, hone their skills via feedback and ratings, and help sellers practice and prepare for customer presentations. Brainshark now partners with SEP providers, including Highspot. Brainshark can run natively in Salesforce CRM and is integrated with Microsoft Dynamics 365.

#### Strengths

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

#### Challenges

- Focus outside of sales coaching and learning



## SalesLoft

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SalesLoft offers an SEP that is focused on sales communications, analytics, and integrations. In 2019, SalesLoft acquired Costello to offer more features in deal management and guided selling. In 2019, SalesLoft announced its Series D Round of U.S. \$70 million, which is being used for international expansion, including its new office in London. SalesLoft enables communications via email, phone, and social and in 2019, added the ability to leverage SMS texting. SalesLoft partners with DocSend and Highspot for content management.

In 2019, SalesLoft added a new mobile app and more AI capabilities to prioritize leads. It also enhanced its new dashboard package that integrates with Salesforce. SalesLoft also has robust partner integrations, including Slack, LinkedIn, Microsoft Outlook, Salesforce, and video providers such as Vidyard, VidGrid, and Videolicious. With its new Microsoft Dynamics and SAP integrations, SalesLoft now has an expanded set of CRM providers to partner with.

### **Strengths**

- Ease of use
- Sales communications
- Voice and meeting analytics
- Partner ecosystem
- Ability to automate communications

### **Challenges**

- Market awareness outside of the U.S.

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## Innovators

### **DialSource**

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DialSource, based in Sacramento and led by CEO Josh Tillman, offers an SEP that automates the sales communications process. DialSource works natively in Salesforce or Microsoft Dynamics 365 and offers a power dialer, voice, email, and SMS texting capabilities. Its pre- and post-call automation means that the CRM opportunity is always kept up-to-date. One of the strengths of DialSource is its scalability, which is why large enterprises often select it. DialSource also supports both inbound and outbound calling capabilities including advanced call routing.

DialSource has built a robust voice network which is one of the reasons it offers high call quality. It also offers its own robust dashboards and reports directly within CRM so reps and managers can understand what is going on. Priority queues and dynamic campaigns allow reps to focus on the deals that need attention first. Because DialSource is native inside of Salesforce, security is a given. Call recordings can be stored in Salesforce or in any content repository of the customer's choice. Because it also includes a compliance tool, it can be configured so that a rep does not over-communicate with a prospect.

#### Strengths

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

#### Challenges

- Market awareness

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## OneMob

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OneMob is a modern sales engagement platform for today's buyer and seller. It offers a platform that makes business communications personal, engaging, instant, and measurable. OneMob users can be more personal by recording company-branded video messages using their mobile apps or computer device. They can be more engaging by combining these videos with additional sales content like documents, images, and URLs, and sharing through common methods like email, text, and social selling. They can be more instant by hosting real-time meetings and tracking attendance and content engagement during the meeting, with no plugins to install. They can be more measurable with all video, content, email/link, and meeting engagement tracked in realtime and logged back to CRMs like Salesforce and MS Dynamics.

OneMob helps sales teams to create engaging content and connects easily with buyers asynchronously through trackable emails/links or synchronously with real-time meetings. OneMob also closes the gap between seller effort and revenue impact through its deep integrations with Salesforce and Microsoft Dynamics CRM platforms. Productivity is also increased by its native integration with SalesLoft. For cloud content storage, it supports Box, Google Drive, Dropbox, and Microsoft OneDrive. User-generated content such as video is often key to getting a prospect to engage and this helps to set OneMob apart.

### Strengths

- Mobile video creation and editing capabilities
- Desktop video creation and editing capabilities
- Landing page customization
- Mass email with scheduling capabilities
- Meeting platform with tracking changes
- Video, content, email, and meetings analytics
- SalesLoft and Outreach native integrations
- Content integration (Box, Google Drive, MSFT OneDrive)

### Challenges

- Market awareness

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## Pitcher

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Pitcher has continued to offer a sales enablement offering that gives sales reps who are on-the-go or at the office full functionality even when not within their CRM. It is driving success in the life sciences, consumer goods, manufacturing, and financial services markets—where industry tailored solutions are critical. In markets such as consumer goods, Pitcher provides a complete retail execution solution as part of its SEP offering. In life sciences, manufacturing, and financial services, Pitcher is providing more of 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 to multi-channel enablement across social messaging services like WhatsApp, Line, Viber, WeChat, etc.

One of the core focuses of Pitcher is a holistic view on the sales rep whether they are in the field or at the back office. Its success in various industries is due to the core capabilities that include interactive and dynamically adapted presentations, micro learning, route planning, task management, store audits, key account management, and order and sample management, among others. In 2019, Pitcher has seen growing success in life sciences and pharma by partnering with Salesforce to offer an alternative to existing solutions such as Veeva as well as in consumer goods by complementing Salesforce's Consumer Goods Cloud. 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.

### **Strengths**

- Ease of use
- Mobile-first application
- Off-line functionality
- eDetailing
- Task and activity management
- Automatic content conversion engine

### **Challenges**

- Market awareness in U.S.

## RevenueGrid

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RevenueGrid, based in Mountain View and Kyiv and led by CEO Vlad Voskresensky has been in business since 2006 under the Invisible.io brand and has been offering its capabilities in an OEM fashion for years. RevenueGrid offers an SEP that focuses on revenue intelligence (also called sales AI), sales communications, and guided selling. Its offering uses AI to automatically create and update all CRM records with contact information found in communication channels, such as email, calendar, dialers, messengers, marketing automation, and others. RevenueGrid also offers easy to setup omni-channel campaigns that have built-in sequences. Built-in analytics lets sales reps know what email or message is being looked at so they can respond at just the right time.

RevenueGrid also has guided selling features to suggest the next best step, as well as other actions. For sales managers, it also has sales coaching and team analytics to let them know who needs help and what to focus on with individuals. RevenueGrid's analytics lives inside communication platforms and as a result, uses far more reliable data to drive the intelligence. For email campaigns and sequences, playbooks can be developed and reused that leverage the sequence timing based on actions the prospect takes. Given its built-in sales AI capability, RevenueGrid has raised the bar and others will want to look at adding this functionality.

### Strengths

- Sales communications
- AI based revenue intelligence
- Guided selling
- Dashboards and reports
- Install base with OEM partners

### Challenges

- Market awareness

## SalesHood

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SalesHood focuses on sales content management, coaching and learning, and guided selling. SalesHood continues to power a number of fast growing, sales-focused firms by helping companies speed up their sales enablement impact with just-in-time learning, coaching, and content sharing. SalesHood continues to help companies realize huge improvements to time to ramp, quota attainment, and win-rates. SalesHood is available for direct sales and partners. It has a complete sales methodology embedded into its platform and library with its Selling Through Curiosity partnership.

SalesHood enables the delivery of branded content, as well as videos. The ability to surface the right content in opportunities in Salesforce based on the status of the opportunity is helping SalesHood to win sales content management opportunities. SalesHood also enables automated content delivery that can increase overall productivity of sales teams. Additionally, in October 2019, SalesHood announced its sales kickoff automation solution to automate the way sales kickoffs are delivered

### Strengths

- Sales content management
- Sales coaching
- Training and onboarding
- Integrations with Salesforce
- Ease of use

### Challenges

- Market awareness

## vablet

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vablet continues to offer a sales enablement platform that is optimized for sales professionals on mobile devices or PCs. 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. It enables the sharing of content including video, rich-media, and interactive presentations. One of the things that makes vablet ideal in life sciences is its ability to push new content to devices with full tracking capabilities and full offline access. vablet also enables intuitive ways to share video content, which is often a catalyst to enable a sales rep to get the buyer’s attention.

Vablet continues to focus on life sciences and has added financial services and medical devices as focus areas as well. Its ability to leverage extensive product catalogs on a mobile device makes it an ideal choice in life sciences and medical device markets. vablet’s form building tool also makes it ideal for data capture for reps on-the-go. Enterprises also like the native integrations with cloud content management providers, such as Box, Dropbox, Google Drive, Microsoft SharePoint, Hyland OnBase, and Oracle PLM. Mobile selling is vital in a number of industries and vablet is well positioned to help enterprises gain maximum productivity for on-the-go sales reps.

### Strengths

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

### Challenges

- Market awareness



## VanillaSoft

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VanillaSoft, which is based in Plano, Texas, and Gatineau, Canada, received a U.S. \$4 million investment round in May 2019. VanillaSoft offers an SEP that focuses on communications, including voice, email, and SMS messaging. For inbound calls, VanillaSoft also offers queue-based lead routing. This results in substantially more productive sales reps capable of qualifying a higher volume of leads due to the resulting speed-to-lead, persistency, and cadence. VanillaSoft has also crossed the threshold from voice and email appointment settings to include mobile messaging, which can help to improve customer journeys. VanillaSoft's scripting tool allows a sales rep or agent to adapt the conversation on the fly, which will help new and experienced sales reps.

VanillaSoft has been building its install base and has solutions for inside sales, 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. VanillaSoft is expected to add more AI capabilities in 2020.

### **Strengths**

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

### **Challenges**

- Market awareness
- Content management capabilities

## **Specialists**

### **Journey Sales**

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Journey Sales offers Smart Rooms, Smart Plays for campaigns, and robust analytics. Smart Rooms is an account-based selling solution for sales teams to engage with prospects and customers throughout the entire customer lifecycle. Smart Plays playbooks can be customized and used in different account situations.

Journey Sales differentiates its Smart Rooms offering with its predictive analytics capability, which tracks all customer and content engagement rates. Contacts in every deal are given an engagement score, which will help sales teams understand if a key sponsor is engaged or if they need attention. Contacts that are in a Smart Room can also invite colleagues into the room. One of the platform features of Journey Sales is that it runs natively on the Salesforce platform. This means it can support integrations seamlessly and also be pre-qualified to meet security guidelines that others need to be vetted for.

#### **Strengths**

- Sales content management
- Predictive analytics
- Salesforce integration
- Sales and customer team collaboration

#### **Challenges**

- Market awareness

## Getting Started with Sales Enablement

Sales teams need a dedicated work environment that delivers customer engagement and rep productivity. By providing a focused set of capabilities to sales teams, engagement rates with prospects goes up. Aragon recommends evaluating providers and conducting a pilot program that leads to a full sales organization rollout.

Sales enablement platforms really represent the cutting-edge in transforming sales organizations. Payback in terms of ROI usually happens in the first six months after a successful deployment. Enterprises that do not leverage this new digital work hub for sales may still grow but will not see the kind of productivity and growth that firms that leverage SEPs will.

### Aragon Advisory

- Sales enablement platforms are here to stay. Enterprises can't depend on old portals and email to deliver customer engagement.
- Understand product roadmaps from all prospective vendors.
- Carefully evaluate your needs for sales content automation and sales communications. In some cases, an enterprise may end up buying two distinct offerings due to functionality.
- If your enterprise is using tablet devices, realize that not all SEP providers are optimized for these platforms.

### Bottom Line

Sales teams are under pressure to deliver results and sales enablement platforms are their new work hub that can provide them with a competitive advantage. As the world shifts to digital selling, sales teams need better ways to reach their customers to get deals over the goal line. Sales leaders are also demanding more automation, and SEPs deliver on both of these fronts. 2020 is the year to go enterprise-wide with an SEP.