Market Guide for Sales Enablement Platforms

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Initiatives:CRM Sales Technology

Sales enablement platforms provide essential functionality to support sales organizations, especially in a postpandemic recovery. Application leaders supporting CRM sales technology should use this Market Guide to improve their understanding of the key capabilities offered.

Overview

Key Findings

- Sales enablement platforms are evolving and many vendors are supplying more than one core capability such as content, training and coaching.
- Vendors that do not supply the entire platform capabilities use open APIs and partnerships that support complementary functionality and the larger engagement ecosystem.
- COVID-19 initially caused an overall increase in purchase and adoption of sales enablement technology. This increased demand will persist, with sales enablement technology becoming a core tech stack purchase for organizations with both direct and partner channels.
- Digital sales rooms (DSRs) will likely be offered by sales enablement platform vendors through persistent microsites for internal/external collaboration, embedded video conferencing, and engagement, sentiment and emotional analysis.
- Sales enablement platforms continue to improve buyer engagement analytics and begin to offer new capabilities such as marketing automation, conversational analytics, or augmented reality (AR)/virtual reality (VR).

Recommendations

For application leaders supporting CRM sales enablement technology initiatives:

- Use this Market Guide to evaluate sales engagement platform vendors' ability to support your use cases and organizational size.
- Seek vendors with a holistic approach — native or through integration — to sales enablement to support your entire sales enablement initiative, including content, training and coaching.
- Prioritize vendor integration or native capabilities with microsites that include capabilities such as buyer/seller collaboration, video conferencing, and engagement, conversational and

emotional intelligence analytics to support DSRs.

- Assess vendors' capabilities or partnerships for AR/VR to support product demonstrations.
- Evaluate the strength of each vendor's partner ecosystem to support additional capabilities for your organization.

Market Definition

Gartner defines sales enablement platforms as tools that unite sales enablement functions with customer-facing sales execution. They predominantly support native content, sales training delivery and reinforcement, and sales coaching. They can be used for direct sales and indirect partner/channel enablement. The platform can include all three areas natively or use open APIs to connect to the complementary functions. If the latter, the relationship needs to be a selling relationship where integration has been prebuilt and data movement and sharing/synchronization is seamless between the applications to supply a better end-user experience. Sales enablement platforms also use APIs to support a wider array of functionality available via their ecosystems.

Gartner's view of the market focuses on transformational technologies and approaches to meet the future needs of end users in a seller role. It does not solely focus on the market as it is today.

Market Description

Organizations use sales enablement platforms for at least one of the top eight use cases shown in Figure 1. Mature organizations will utilize multiple use cases.

The top use cases shown are based on vendors' service offerings and include the three major functionalities of content, training and coaching required for sales enablement platforms. These three work together to form a holistic enablement program. Content is used to spur engagement and educate sellers. The results from analytics, when fed into training and coaching algorithms, help improve training recommendations and coaching suggestions to increase sellers' proficiency and guide them to meet customers wherever they are in the buying journey. All associated material, whether used internally or externally, can be used to measure and increase engagement during the various phases of the deal cycle to improve selling outcomes.

Figure 1. Top Use Cases for Sales Enablement Platforms

Top Use Cases for Sales Enablement Platforms

Source: Gartner
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We define these eight use cases as follows:

1. **Customer-facing selling:** Sales content is used to educate prospective and existing customers, to encourage purchases or assist buyers' decision-making processes.

2. **Relationship selling:** Sales content is used to educate and build relationships with buyers in industries such as pharmaceuticals and manufacturing, where content and on-site demonstrations are valued. The relationship with the buyer is ongoing.

3. **Seller onboarding:** Initial training is provided to new hires.

4. **Continuous education/seller skills and proficiency training:** Microlearning or just-in-time learning are provided to tenured sellers to improve skills and proficiency in areas such as sales methodology. Quizzes, assessments and reinforcement training are included.

5. **Sales coaching:** Live and practice pitches, as well as live calls, are recorded and used for peer-to-peer, manager-to-seller and seller-to-manager coaching, to hone skills and glean insights on deal

health and next steps.

6. **Partner relationship management (PRM)/channel enablement:** Sales content, such as product specifications, and partner-specific training is distributed to partners.

7. **Inside sales/sales development representative (SDR) processes:** Inside sales representatives use sales content, such as "first call" pitches, to accelerate the lead qualification processes.

8. **Sales manager processes:** Coaching and content for managers to improve skills and enable sellers.

For details of how different vendors serve these use cases, see Table 3 in the Appendix.

Market Direction

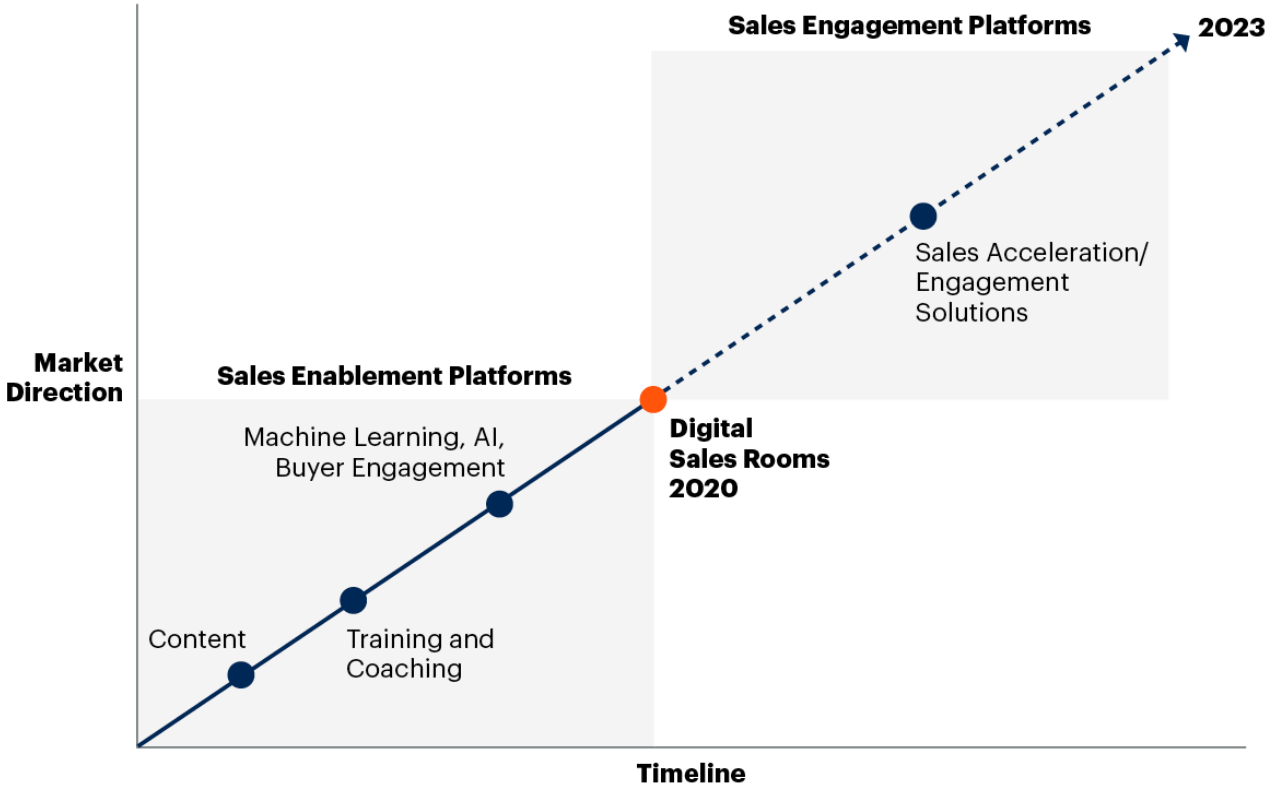
Gartner estimates that revenue in the sales enablement market came to $1.247 billion in 2019, an increase of approximately 20.3% over the prior year. While we expect the sales enablement platform market to continue to develop and mature — as it is a high-growth sector — against a COVID-19 backdrop, we do not expect to see this rate of growth for next year, but we do anticipate a strong bounce back over the following one to two years.

As more organizations aim to take a holistic approach to sales enablement — one that includes content, training and coaching at the core — many vendors have responded by offering native capabilities to some degree in all three functional areas. The remaining vendors have strengthened selling partnerships and open API integration for a seamless experience for end users. Now we see that many organizations have moved much of the sales process to digital channels and are inquiring about digital sales room (DSR) capabilities. DSRs include microsites that persist where sellers and buyers can share content and collaborate. They include integration with video conferencing, or native capabilities for it, where buyer engagement, sentiment and emotional analysis can be captured. Emotional analysis captures body language and facial expression for engagement levels. Analytics to feed engagement scores and "next best action" recommendations, or even "in the moment" recommendations, to increase engagement are helpful for sellers. Eventually, microsites will integrate or natively offer virtual reality (VR) or augmented reality (AR) for demonstrations of products (see "Virtual Selling Emerges as a Priority for CRM Sales Technology Programs").

Sales engagement capabilities have some overlap with sales enablement, and we expect more overlap to evolve sales enablement platforms in the future. Please note that not all of these capabilities are readily available today, though some are, and to a very usable extent (see Figure 2).

Figure 2. Direction of Sales Enablement Platform Market

Sales Engagement Platforms Market Direction
Illustrative



Source: Gartner
AI = Artificial Intelligence
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Market Analysis

Gartner segments the sales enablement platform market into six capability categories. These categories, which include subfunctions, are common to the vendors in this Market Guide, and are as follows:

- **Digital content management** — Functions for creating, storing, curating and distributing sales materials to sellers and buyers. This category includes microsites for content sharing and collaboration. Integrations or native capability for video conferencing are becoming more common.

- **Sales training** — Functions for just-in-time/microlearning, quizzes, assessments and reinforcement training for end users in multiple form factors using written, audio and video material. This category includes creating, storing or integrations with formal learning management system (LMS) training assets that can be used for onboarding and continuing education. It may also include integration of commercial off-the-shelf (COTS) sales methodology material.

- **Sales coaching** — Functions for coaching end users and managers on selling activities. It includes peer-to-peer, manager-to-seller and seller-to-manager coaching. Video coaching is the prominent form factor with high perceived ROI value. It also includes live call recording and analysis.

- **Analytics and engagement** — Analytics for platform usage. Measurement of both seller and buyer engagement within the stages of a process. Buyer engagement is measured by interaction analysis, such as analysis of content opened, content shared or interest level. New forms such as conversational analytics, sentiment analysis and emotion analytics are emerging.

- **Integration and platform** — Native functionality, with a set of open APIs to connect to other systems, such as CRM systems, and to training/coaching/content-specific vendors, if all capabilities are not provided natively. Functionality may also include connection to sales acceleration systems and video conferencing.

- **Machine learning** — Machine learning includes prescriptive recommendations about content for sellers to distribute, training to take, coaching to perform, and/or actions to take, based on seller or buyer consumption.

To see the extent of the capabilities offered by representative vendors, see Tables 3 to 11 in the Appendix.

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Market Introduction

Use Table 1 as a quick reference guide to the names of representative vendors and their sales engagement platform solutions. Note that many vendors offer tiered licenses or multiple product versions that affect their licenses. These solutions are generally delivered as SaaS. There are, however, some exceptions in which an on-premises version may be offered.

Table 1: Representative Vendors of Sales Enablement Platforms

Vendor	Product, Service or Solution Name
Accent	Accent Connect, Accent CRM Supercharger, Accent Accelerate
Allego	Allego

Apparound	Apparound
Bigtincan	Bigtincan Hub
Brainshark	myBrainshark Pro, Brainshark Premier
ClearSlide	ClearSlide
Highspot	Highspot
Lessonly	Lessonly
Mediafly	Mediafly
MindTickle	MindTickle
Modus	Modus Sales Hub
Pitcher	Pitcher
SalesHood	SalesHood
Seismic	Seismic
Showpad	Showpad Sales Enablement Platform

Source: Gartner (August 2020)

Table 2 shows whether the vendors offer content, training and coaching functionality natively.

Table 2: Native Functionality of Sales Enablement Platform Vendors by Category

Vendor	Digital Content Management	Sales Training	Sales Coaching
Accent	✔	✔	✔
Allego		✔	✔

Apparound	✔	✔	
Bigtincan	✔	✔	✔
Brainshark	✔	✔	✔
ClearSlide	✔		
Highspot	✔	✔	
Lessonly		✔	✔
Mediafly	✔		
MindTickle		✔	✔
Modus	✔	✔	✔
Pitcher	✔	✔	✔
SalesHood		✔	✔
Seismic	✔		
Showpad	✔	✔	✔

Source: Gartner (July 2020)

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Vendor Profiles

Accent

accent-technologies.com

Accent offers sales enablement capabilities for content, coaching and guided selling, with its primary product being the content product. Sales analytics and sales coaching/training are sold

separately. With over 70 customers, the majority of its implementations occur in sales organizations between 2,500 and 7,500 users.

The top capability of Accent is sales analytics, analyzing how sellers build engagement with customers, or how committed sellers are to specific deals. It analyzes and presents information for buyer engagement by role and title, providing a timeline of communications. Accent includes prescriptive opportunity prioritization, next best actions, and sales training recommendations based on the health of deals. These functions are relevant for companies interested in conducting customer journey analytics or building a business graph of optimal selling behaviors.

Accent has a complete set of sales content management capabilities, offering microsites for secure delivery of content to buyers. Tray.io can be used to connect to voice over IP (VoIP) tools and dialers.

Accent added new seller performance analytics and sales training and coaching capabilities, including sales pitch recording, microtraining lessons and knowledge retention testing. The vendor's roadmap includes AI-based content personalization and salesbots.

Notable customers: AMD, Analog Devices, FIS (Worldpay), Truist

Supported integrations: Adobe-Marketo, Microsoft (Dynamics), Microsoft (Exchange/Office 365), Oracle (Eloqua), Oracle, Salesforce, Tray.io, Zoom, LogMeIn (GoToMeeting)

Pricing: Accent Content starts at $35 per user per month (PUPM). Add-ons start at $35 PUPM

Allego

www.allego.com

Allego offers three modules — sales learning, sales content management, and sales coaching and collaboration — and continues to expand its capabilities. It maintains partnerships with digital content management for sales (DCMS) vendors, via open APIs, to round out its offering. Allego maintains a high adoption rate with its customers.

Allego continues to focus on sales training and coaching with an all-in-one approach to providing information in the flow of work. Retention of training utilizes flash drills and crowdsourced videos. Calls and material are surfaced to sellers. With PowerPoint and a webcam, a live software demo can be captured in Allego. A refreshed UI is scheduled for August. The product supports Chinese (Simple and Traditional), English, French, German, Japanese, Korean, Portugese and Spanish.

Allego has added capabilities including:

- A call coaching module — coaching opportunities for live call recordings. Integrations enable calls and web meetings to be imported via call-center applications. Business-configured topics and talk-to-listen ratio are analyzed, and calls can be logged as activities in the CRM.

- Intelligent recommendation feed — contains content for learning and sales content, shareable with prospects and customers.
- Outlook and Gmail plug-ins allow Allego to track and measure buyer engagement of sales content.

Notable customers: Abbott, Tableau, Legg Mason, John Hancock, Nuveen

Supported integrations: Salesforce, Microsoft, Gmail, Google Chrome, AWS (for hosting and AI for speech-to-text translation), web conferencing and cloud communication platforms, Seismic

Pricing: Not provided

Apparound

www.apparound.com

Apparound has focused its product development on extending the capabilities of its configure, price and quote (CPQ) application to support sales training this year. Apparound continues to attract customers and reports a healthy double-digit, year-on-year growth while still maintaining private ownership. The majority of its customer implementations are for less than 1,000 users, although it serves up to 5,000. Apparound is also a sales enablement platform that can be expanded with a roster of add-on modules. These include quoting, electronic signature capture, sales tracking and knowledge management applications. Additional extensions are available both on the Zapier application marketplace and Microsoft Azure Logic Apps.

In the new sales training module:

- Users create training content or import documents and videos.
- Training content can be broken into modules and delivered as a seller learning path.
- Sellers can be limited to a number of attempts to pass a test before being redirected back to the training course.
- A manager dashboard allows managers to view the progress of training.
- Training can be distributed to a team of sellers or an individual.
- Training can be provided for the add-in modules — for example, the CPQ system.

Notable customers: Vodafone, Sorgenia, Axpo, CRIBIS D&B, DiaSorin, Peroni

Supported integrations: Multiple providers via API connections in the Zapier application marketplace and Azure Logic Apps.

Pricing: Essential (€59 PUPM), Professional (€69 PUPM), Enterprise (€79 PUPM)

Bigtincan

www.bigtincan.com

Bigtincan experienced a 55% growth in the last year fueled by further investment and the acquisitions of three companies including XINN, supplementing its document automation features. Bigtincan has expanded its physical presence into Europe, Asia and North America. It delivers a single platform focused on sales asset management, learning, coaching and automation. It has released 100 new features and updates over the last year.

Enhancements include:

- Document automation — search and creation of content for sales presentations using artificial intelligence (AI)/machine learning (ML).
- Presentations — predesigned templates to ensure best practices and corporate policies.
- Coaching and training — video and audio recordings analyzed across many data points including sentiment, product positioning accuracy and key terms usage.
- Personalized guided learning — AI to develop specific learning experiences delivered to mobile devices based on the seller's knowledge and skills.

Bigtincan integrates with Adobe's creative tools and allows content delivery directly from the application. It offers APIs for platform development, with five vendors already building applications. It also offers support for 23 languages.

Notable customers: DXC, Nike, Merck, Thermo Fisher Scientific, Biogen, Aetna, ANZ, American Express, Anheuser-Busch, Corning, Apple, Sephora, AT&T, Verizon, Optus, Telstra, GM, Toyota, Deloitte, PwC, CGI Interactive, American Airlines

Supported integrations: Microsoft Dynamics 365, Salesforce, Oracle CRM On Demand, Adobe CQ, SugarSync, SAP, Veeva, Microsoft Outlook, Gmail, SalesLoft, HubSpot, Marketo, Eloqua, Salesforce Pardot, Box, Dropbox, Google Drive, Microsoft SharePoint, SAP Litmos, Cornerstone LMS

Pricing: $29.50 to $49.50 PUPM depending on edition

Brainshark

www.brainshark.com

Brainshark has over 1,100 customers and focuses on all three aspects of digital customer content, training and coaching. Its platform supplies sales teams with training, onboarding, video coaching and data-driven sales enablement.

Brainshark recently acquired Rekener, enabling multiple data sources to be unified (including raw data), and multiple tools from CRM, CMS and MarTech to be available on one platform. This does not replace all other tools, but enables better usage of all the disparate datasets that can now be translated into real-time metrics via Sales Scorecards. This ties together the critical components of content, training and coaching for rep alignment and benchmarking, allowing sales leaders to have more targeted and meaningful rep-to-rep interactions. Brainshark has integrated Rekener's Scorecard features into its core offerings and products. The result is a comprehensive sales-readiness platform.

Brainshark continues to take a largely LMS approach to enablement. The core platform has been enhanced with improved video coaching and searchable material. The leaderboard concept helps to gamify training among sellers. This view can also be turned into "new" content based on previous successful pitches from across the organizations, reducing rep to revenue time. On its roadmap, Brainshark has plans to deliver conversational intelligence to its coaching solution to improve seller skills.

Notable customers: Zoom, PTC, Wrike, Frontier Communications, J. G. Wentworth, Tactile Medical, Riverbed, Colonial Life

Supported integrations: Highspot, Microsoft, Salesforce, Seismic

Pricing: Not provided

ClearSlide

www.clearslide.com

ClearSlide, owned by Corel, sells the SaaS-only ClearSlide sales enablement platform for sales content management, guided selling and sales analytics. It includes customer engagement functions like virtual meeting software, call recordings and API integrations with other sales technology providers. It targets the financial services, hospitality, media, high tech, and manufacturing verticals.

The product's top capability is native virtual meeting functionality, important for sellers who want a virtual meeting solution that directly integrates with their sales tools. Sellers can immediately launch a virtual meeting with a prospect through a personalized web link, a relevant efficiency function for sellers. Users can share presentations with a single click.

Other capabilities include:

- Unique campaign management — Create automated email "drip" campaigns with time-based triggers.
- Meeting recap — Capture meeting metrics and measure meeting attendee engagement, for example, talk-to-listen time or active presentation viewing time.

- Call recording — Managers can change playback speed or clip segments of the recording. The latter is helpful for call coaching and best practice sharing.
- AI-based spam validation feature.
- "Best time to send email" function.

ClearSlide's roadmap includes sales coaching and training functions and deep content links.

Notable customers: Sacramento Kings, Variety, GoDaddy, The Economist

Supported integrations: Aviso, Box, Chorus, Clari, Dropbox, ExecVision, Gmail, Google Drive, Gong, InterCall, LevelEleven, Microsoft Dynamics 365, Microsoft Outlook, Salesforce, Slack, Twilio

Pricing: Starting at $35 PUPM depending on edition. Enterprise package includes free onboarding and implementation services

Highspot

www.highspot.com

Highspot is building a reputation for being one of the simplest and easiest to use sales enablement platforms on the market with rapid adoption for customers and low churn. It has experienced rapid revenue growth in the last year, and includes a physical presence now in London and Munich. Its "Spots" and "SmartPages" enhancements provide greater personalization of content, increased ease of use and extensive AI use throughout.

Highspot updates include:

- Extensible platform — Provides dynamic, mobile-ready guidance alongside content.
- SmartPages — Customize content experiences and streamline the process for pitching.
- SmartPage Marketplace — In-platform access to partner-built SmartPage templates (i.e., Challenger, DSG, RAIN Group and Sandler Training) and customization.
- Analytics — Analyze content performance and use multiselect bulk archival or deletion.
- Reporting — Content usage and engagement patterns insights surfaced in SmartPages.
- Communication — Integration with major communication and collaboration vendors so sellers can send content recommendations.

Highspot provides consulting services to customers to aid in integration, deployment and training.

Notable customers: Dow Jones, Euler Hermes, FTI Consulting, Icertis, Maxar, Nestlé, Zillow

Supported Integrations: Salesforce (Sales Cloud and Pardot), Microsoft Dynamics 365, Microsoft SharePoint, OneDrive, Box, Dropbox, Google Drive, Adobe Experience Manager, Nuxeo, Jive Software, Microsoft (Office, Outlook, Power BI), Gmail, Outreach, Oracle (Eloqua), Marketo, Brainshark, MindTickle, Showpad, Cisco Webex, join.me, Zoom, BlueJeans, Glance, LogMeIn (GoToMeeting), SalesLoft

Pricing: Pricing starts at $55 PUPM, plus a one-time implementation fee based on customer license count

Lessonly

www.lessonly.com

Lessonly focuses on training and coaching areas for the sales enablement market. Its “put the learner first” approach results in a very user-friendly training and coaching product. Lessonly has strengths in sales manager engagement through a strong pitch grading process and standard skills testing, which are all native functionality. It also offers competitive support and training, whereby sellers can test their products and services against competitors to assess their pitch strengths and weaknesses.

Capabilities include:

- Messaging — Enabling learners to easily search, access and ask questions of content authors, feeding the product feedback loop between sales and product marketing and development within one solution.
- On-demand practice options — Practicing a sales pitch or sharing a customer story.
- Dynamic searchable content — Surfaces insights to sellers for the right vertical.
- Multilanguage support.
- Mobile and PC ready.
- Predictive — Chrome extension to recommend training and coaching when a user visits specific websites or pages.
- Insights — Analytics, visualization and performance reporting.

Lessonly’s roadmap includes adding functionality to measure competency and skills. Its new skills engine will focus on 15 core skills needed for successful sellers, allowing managers and sellers to see a dynamic self-assessment with personalized insights on skills gaps/opportunities.

Notable customers: U.S. Cellular, Emarsys, Trunk Club, FiscalNote, and SalesLoft

Supported integrations: Highspot, Mediafly, Rippling, Salesforce, Seismic, Slack, Zapier, Zendesk

Pricing: $20 to $28 PUPM, depending on the edition. Volume discounts available. Large implementations have additional setup costs

Mediafly

www.mediafly.com

Mediafly continues to build on successes within consumer packaged goods (CPG), media, technology, health sciences and financial services, reporting triple digit revenue growth last year without venture capital assistance. Mediafly adds functionality through internal development and acquisition such as iPresent to incorporate its animated content, workspaces and content hubs into Mediafly.

Capabilities from over 83 releases include:

- Video — For sales presentations, training and coaching/playback can be controlled effectively, reducing file size of PowerPoint presentations and providing a seamless UX. Mobile friendly.
- Insights reporting platform — Visibility into how sales content impacts sales conversations and drives revenue, content usage or sharing before, during and after live prospect/customer meetings, and how prospect engagement with content influences deal progress.
- Workspaces — Administrators can design visually rich, custom workspaces. Sellers use Mediafly Workspaces to deliver compelling user experiences for prospects. End users can also create their own workspaces to illustrate content on their own.
- Tool Builder — Presales engineers create powerful ROI and TCO tools with customizable branding, a suite of calculator configuration options and a library of over 100 precreated benefits.

Notable customers: Colgate-Palmolive (Hill's), PCA SKIN, PepsiCo, Coty, Goldman Sachs Group, NBCUniversal, Okta, LG, Conagra, Johnson & Johnson

Supported integrations: SAP Hybris, Salesforce, Microsoft Dynamics, SugarCRM, Nielsen, Microsoft SharePoint, Salesforce Pardot, HubSpot, Docebo, Lessonly, MindTickle, SAP SuccessFactors, Outreach, SalesLoft, Sixth Sense Ventures, Cisco Webex, Zoom.

Pricing: Mediafly Platform: $9 to $60 PUPM based on the edition (Essentials, Pro, Enterprise) and the tier of users

MindTickle

www.mindtickle.com

MindTickle focuses on training and coaching for sales enablement. Content can be sourced via partners. MindTickle cites its Sales Capability Index (SCI) as the cornerstone of effective sales

training and coaching, tracking content usage and effectiveness, employee training progress, seller skills and effectiveness, and coaching. Enhanced with sentiment skills analysis, leader/manager dashboards display metrics to address knowledge/skills gaps.

Capabilities from over 84 new features include:

- User experience — Coaching provides better navigation and improved back-end and front-end extensibility.
- Role play — Updated capabilities in the MindTickle Missions product to accommodate a larger set of use cases and complexities for enterprise clients.
- AI — Automated transcription of video role plays, system-identified actionable insights based on admin criteria or a model pitch, speech rate and pitch length monitoring.
- Spaced reinforcement — Create systematic learning paths to reinforce knowledge at specific intervals, ensuring knowledge retention with scenario-based questions adaptively assigned in accordance with learners' individual learning strengths and weaknesses over a period of time for long-term retention.

Notable customers: Fortinet, NetApp, Square, AppDynamics, Janssen, CM Group, Halcyon Knights, on-site, Dabur, Ola Cabs, Nutanix, Symantec, TurnKey Vacation, Endologix, MongoDB

Supported Integrations: Okta, Zoom, Outreach, Workday, Microsoft Dynamics, Salesforce, Amazon Web Services (AWS), IBM, Ping Identity, Symplified, OneLogin, Seismic, Highspot, Mediafly, Dropbox, Box, ClickView, Tableau, Veeva, Google, Slack, Skillsoft, LinkedIn Learning, Microsoft Azure Active Directory

Pricing: $15 to $50 PUPM depending on number of users and feature package, plus a one-time implementation fee

Modus

www.gomodus.com

Modus, a SaaS-focused company, has a strong foundation in manufacturing, healthcare, transportation and dealer networks with 180-plus clients. Its sales enablement platform natively includes content, training and coaching, as well as open API connections to other vendors. The Modus sales hub includes: sales content management, interactive selling, sales readiness and lead capture. Lead capture has been expanded to virtual events. Modus white labels its solution for major clients. It focuses on direct and channel selling, providing the same level of analytics and information.

The Modus value proposition includes:

- 360-degree product tours — These include interactive images and videos and PDFs so that buyers can interact with products.
- Customer microsites — Allow sellers to share content and include chat messaging between sellers and buyers.
- Modus Capture — Allows seamless lead capture at tradeshows or virtual events and immediate placement in lead generation activities.
- Microsites and microlearning.

Modus has boosted its capabilities to allow buyers to take virtual product tours and view collateral that they can email themselves. These actions are recorded in the CRM system, thereby avoiding manual data entry.

Notable customers: Caterpillar, AT&T, Navistar, Bobcat, Doosan, Volvo, Graco, Daimler Group, Oticon, Elekta

Supported integrations: Salesforce, Oracle CX Sales, Microsoft Dynamics, HubSpot, Adobe Marketo, Oracle Eloqua, Salesforce Pardot, Sitecore, Box, Dropbox, OneDrive, SharePoint, Adobe, Widen, Crownpeak, Brainshark

Pricing: Starts at $25 to 50 PUPM. Onboarding, set-up and training one-time fee ranges from $5,000 to $20,000. Enterprise agreements available.

Pitcher

www.pitcher.com

Pitcher has a unique “super app” concept that handles a day in the life of a sales rep. Its remote interaction video tool is very timely in a post-COVID-19 sales engagement world. Pitcher focuses largely on the enterprise market, with a strong customer base in life sciences, consumer goods, manufacturing and financial services.

Out of 18 modules, five are primary: Impact, Zero, Insight, Admin and Connect. These are designed for both B2C and B2B sales. The products have a modular approach, allowing customers to start small and scale up with increased functionality from Pitcher. The vendor’s mobile-first approach is designed for sellers who are dynamically interacting with customers from anywhere and at any time.

All content assets can be tailored to specific customer profiles, while giving consistent brand functionality. Customers can then interact with the seller in real-time, exploring content by category and enabling search and share functions within their buying groups.

Over all, Pitcher offers a holistic approach to B2B and B2C enterprise sales, with its super app concept. The vertical focus and customer focus are key for both individual seller needs and buyer

needs — critical in today's buying environment.

Notable customers: Pfizer, Novartis, Hikma, Sandoz, Alcon, Stryker, Coca-Cola, FEMSA, Diageo, P&G, Henkel, ExxonMobil

Supported integrations: Adobe (Experience Manager), DocuSign, Drupal, Microsoft SharePoint, Microsoft Dynamics, Oracle Enterprise Resource Planning (ERP), Oracle CX Sales, Salesforce, SAP, Amazon (QuickSight)

Pricing: Not provided

SalesHood

www.saleshood.com

SalesHood has capabilities for content, training and coaching natively. It includes content such as prescriptive, just-in-time collateral, sales plays and win stories. Buyer engagement is tracked for content and video consumption. SalesHood includes a skills library, video coaching, coaching templates and team huddles, just-in-time learning, pitch practice, quizzes and learning management. SalesHood supports multilingual search and speech-to-text transcription for video/audio. SalesHood supports direct sellers and partner channels.

Coaching Huddles are team collaboration and knowledge-sharing areas. Managers are guided to facilitate coaching huddles with agendas, team exercises and coaching workflows. Agendas can be displayed in Kanban form to take a user through all steps in a sales enablement program.

SalesHood has released capabilities that include:

- Smart search with tags and filters
- My "Work" for private saved content
- Video features including multilingual, closed caption on video and audio files (desktop and mobile), playback speed, sync video watching on desktop and mobile, and an in-line URL preview in Library
- Updated UI/UX for web browser and mobile
- Correlation analysis

Notable customers: Sage, RingCentral, DocuSign, Domo, Nuance, Demandbase, Omada, TriNet, Confluent, United Way, Tanium

Supported integrations: Google, Salesforce, Microsoft, Gainsight, Seismic, Highspot, Box, Dropbox, Workday

Pricing: List price is $50 PUPM for Learning, Coaching, Selling, Analytics

$10 PUPM for Coaching and Content in Salesforce and Microsoft

$15 PUPM for Presentation Management

Freemium version for small businesses under a certain size with limited functionality

Seismic

www.seismic.com

Seismic grows and expands its customer enterprise and midmarket customer base, focusing on content management. It has open API partnerships with sales training and coaching vendors. Seismic provides data-backed insights, reducing the content quantity and focusing on content quality. It offers flexible workflows, customizable worklists and bulk management tools to decrease the time to get content to market. Content automation capabilities reduce the total volume of content, leveraging dynamic and shareable components that can update from the data source coupled with permissioning and distribution. Its analytics include content and seller action recommendations and content performance.

In 2019, Seismic broadened its offering by acquiring Percolate for marketing automation. Increased usage of its platform for news distribution, online collaboration, buyer engagement tracking and channel team enablement occured as customers moved to remote work.

Seismic has deepened its interactive experiences with personalized and immersive content and improved its analytics. Persistent microsites enable prospects to contribute content and collaborate with sellers. Seismic can gather engagement analytics of how buyers interact with the site and information in it.

Notable customers: Quest Diagnostics, T. Rowe Price, Wayfair, IBM, Gainsight, Siemens Healthineers, Allianz, Cisco

Supported integrations: Microsoft, Salesforce, SugarCRM, Oracle, Allego, Lessonly, Brainshark, MindTickle, Outreach, SalesLoft, Allocadia, Domo, Morningstar, Eagle Investment Systems, FinMason, Marketo, Oracle Eloqua, Salesforce Marketing Cloud, Box, Dropbox, OneDrive, SharePoint, Google Drive, Citrix, Microsoft Outlook, Gmail, Adobe Experience Manager, Sitecore, Slack, Microsoft Teams, Grapevine6, Hootsuite

Pricing: Not provided

Showpad

www.showpad.com

Showpad offers a complete sales enablement platform for digital content, training and coaching. It has strong growth and recently expanded the executive leadership team in anticipation of further market expansion.

Showpad continues to improve on personalized coaching and training. MeetingIQ, its call recording and transcription tool, is fully integrated in Showpad, allowing sellers to learn content and jump dynamically to their most important scripts and presentations for an opportunity. This enables sellers to get to information and training faster and learn what and how to deliver information. Personalization is enabled via integration and synchronization with off-the-shelf presentation and office products. Users can search through personalized assets with dynamic documents and track insights. Showpad also includes a "dynamic document editor" for internal deal spaces that sellers, managers and content specialists can use to collaborate for unified messaging. This is a key attribute in reducing conflicting information to buyers.

Showpad offers:

- Suggestion-based content
- Video-enabled coaching and training
- PitchIQ for feedback and improvement of buyer engagement
- Assignment of video training to course material

Showpad's roadmap includes enhancements in AI and sentiment analysis of reps and buyer data with MeetingIQ and PitchIQ, and improving unified reporting functions for content engagement, user activity and content ROI measurement.

Notable customers: Alteryx, Bridgestone, The Dow Chemical Company, Fujifilm, GE Healthcare, Honeywell

Supported integrations: Adobe, Adobe-Marketo, Aprimo, Bynder, Clari, Microsoft Dynamics 365, NewsCred, Outreach, Salesforce, SalesLoft, SAP Cloud for Customer (C4C), Slack, Widen, Zoom

Pricing: Not provided

Market Recommendations

If your sales organization requires content, sales training or sales coaching, assess vendors' abilities to provide all the required functionality natively. Also, evaluate the extent and depth of vendors' partnerships with other suppliers, via open APIs, to provide a full suite of capabilities. You should do this even if your sales organization is not ready to pursue all three core capabilities — content, training and coaching — at once. Seamless integration of these solutions eases the burden on sellers and improves the adoption and effectiveness of these solutions. Look for advancing ML features for recommendations and deeper analytics capabilities for video and call analysis for engagement.

Evaluate emerging features that support digital sales rooms (DSRs) such as sentiment analysis, emotion analysis, video conferencing, and persistent and collaborative microsites.

Select vendors on the basis of the use cases you want to support. Functionality may include:

- Open API integrations between sales training, sales coaching and content solutions, marketing automation and email systems.
- Online and offline access to sales content, training and coaching, and relevant workflow.
- Guided selling, playbooks and prescriptive and predictive recommendations for content, training and coaching.
- Agile learning, as well as formal training curriculums, including quizzes, assessments, and proficiency or skills training and testing.
- Integrations with CRM tools such as Salesforce, Microsoft Dynamics 365 and Oracle CX Sales, where the sales engagement platform vendor's recommendations are surfaced within opportunities and accounts.
- Sales conversion and engagement analytics for buyers and sellers.
- Mobile-first development, if your use case includes field sellers.

Given the span of influence of these solutions, leaders of lines of business — such as marketing, sales, and learning and development — should be included in any purchase decision, alongside IT leaders.

To obtain an ROI faster, focus on the primary challenge for implementation, rollout and adoption. Consider phased rollouts and gather feedback along the way to make adjustments for better user experiences. Examine each vendor's roadmap to determine whether, and how, it will be able to support your entire initiative as you expand the capabilities you deploy. Scrutinize vendors' integration capabilities to understand how "seamless" they are. Integration can mean many things. Know, for example, if a vendor uses iFrame Tabs or prebuilt bidirectional data integration via open APIs. Look for broader integration to CRMs, marketing automation, telephony and sales acceleration tools.

Evaluate vendors' depth of ability in ML and the use of engagement analytics, sentiment analysis and emotion analysis, as these areas are rapidly evolving. Vendors should provide data-driven insights that enable sellers to make decisions faster and with less friction. Sellers should be able to engage buyers with materials and conversation bolstered by training and coaching that improves sales outcomes. Buyers should be able to collaborate and benefit from smoother interactions that give them the information they need at critical points along their customer journey, which should help ensure a positive experience. Therefore, be sure to benchmark metrics and measure improvements in, for example, deal velocity and content usefulness as a result of deploying a sales enablement platform. Fundamentally, a sales enablement platform should reduce the complexity of seller and buyer interactions, not increase it.

Acronym Key and Glossary Terms

AR	augmented reality
CPQ	configure, price, quote
LMS	learning management system
PUPM	per user per month
VR	virtual reality

Evidence

This report draws on:

- Gartner primary research
- Vendor briefings
- Gartner client inquiry information
- Gartner for Sales Leaders Sales Opportunity Survey — 2019

Note 1
Representative Vendor Selection

The companies profiled in this Market Guide represent vendors of the types of solutions discussed in the Market Analysis section — that is, solutions with sales content, sales training and/or sales coaching functionality. Some offer combinations of such functionality. The vendors listed are also those that have attracted the most interest from Gartner's clients in the last year, judging from their searches on gartner.com and questions during inquiry sessions with Gartner analysts.

Note 2
Gartner's Initial Market Coverage

This Market Guide provides Gartner's initial coverage of the market and focuses on the market definition, rationale for the market and market dynamics.

Note 3: Sales Enablement Platform Capabilities and Use Cases

Sales enablement platforms include capabilities for:

- Sales activity capture

- Open APIs that permit integration with other third-party applications or external data sources
- Tracking, measuring and optimizing engagement with prospects and sellers
- Skills proficiency building with an organization's chosen sales methodology
- Video coaching with speech-to-text translation and analysis
- Measuring sellers' adherence to sales execution best practices

These systems are used to manage and support:

- Sales content
- Sales aids
- Digital presentations
- Best practices
- Cases studies
- Objection-handling points
- Training and reinforcement
- Coaching — practice and live
- Sales insights
- Competency assessments

They often provide a dedicated mobile application, where sales presentations, training and coaching can be accessed both online and offline. Leading vendors will develop mobile first. Presentations can be shared and emailed to contacts and leads.

Leading solutions are fully optimized for device form factors. Many provide strong content library

functions such as versioning, enterprise file synchronization and sharing (EFSS), search and relevancy

indicators. Other solutions offer deep integration into sales processes and sales force automation (SFA) applications. Most solutions have usage metrics so that managers can determine how content, training or coaching affects sales cycles. These include API connectors to other CRM applications such as SFA, sales acceleration, CRM lead management, marketing automation and videoconferencing services. Many solutions also use ML and AI for predictive and prescriptive analytics, as well as guided selling.

Appendix

Tables 3 to 11 are based on information from responses to a vendor survey conducted for this Market Guide.

Table 3: Use Cases Supported

Vendor	Customer-Facing Selling	Relation-ship Selling	Seller Onboarding	Continuous Education	Sales Coaching	PRM/Channel Enablement
Accent	X	X	X	X	X	X
Allego	X	X	X	X	X	X
Apparound	X	X	X	X	X	X
Bigtincan	X	X	X	X	X	X
Brainshark	X	X	X	X	X	X
ClearSlide	X	X	X	X	X	X
Highspot	X	X	X	X	X	X
Lessonly	X		X	X	X	
Mediafly	X	X	X	X	X	X
MindTickle	X	X	X	X	X	X
Modus	X	X	X	X	X	X
Pitcher	X	X	X	X	X	X
SalesHood	X	X	X	X	X	X
Seismic	X	X	X	X	X	X

Showpad	X	X	X	X	X	X

Source: Gartner (August 2020)

Table 4: Content Repository

Vendor	Native Library	Offline Library	Native Integration EFS	Workflow	Moderation (Partner Channel)	Content Search	Advance Search
Accent	X	X	X	X	X	X	X
Allego	X	X	X	X	X	X	X
Apparound	X	X	X	X		X	
Bigtincan	X	X	X	X	X	X	X
Brainshark	X	X			X	X	X
ClearSlide	X	X	X		X	X	X
Highspot	X	X	X	X	X	X	X
Lessonly	X		X	X		X	X
Mediafly	X	X	X	X	X	X	X
MindTickle	X	X	X	X	X	X	
Modus	X	X	X	X	X	X	
Pitcher	X	X	X	X	X	X	X
SalesHood	X		X	X	X	X	X
Seismic	X	X	X	X	X	X	X

Showpad	X	X	X	X	X	X	X

Source: Gartner (August 2020)

Table 5: Content Development Capabilities

Vendor	Native Content Creation	HTML5 Editor	Slide Sorter	SDK for Developing Custom Applications on Tablet Devices	Upload/Edit Video for Mobile and Desktop	Microtraining Content	Fu Co Pa
Accent	X	X	X	X	X	X	
Allego	X	X			X	X	
Apparound	X	X	X	X	X	X	
Bigtincan	X	X	X	X	X	X	
Brainshark	X		X		X	X	
ClearSlide			X		X		
Highspot		X	X	X	X	X	
Lessonly	X	X	X		X	X	
Mediafly	X	X	X	X	X	X	
MindTickle	X	X		X	X	X	
Modus	X		X	X	X	X	
Pitcher	X	X	X	X	X	X	
SalesHood	X		X		X	X	

Seismic	X	X	X	X	X	X
Showpad	X	X	X	X	X	X

Source: Gartner (August 2020)

Table 6: Content Delivery

Vendor	Email Templates	Jump to Slide	Training Paths	Secure Download Pages From Microsite Webpages
Accent	X	X	X	X
Allego		X	X	X
Apparound	X	X	X	X
Bigtincan	X	X	X	X
Brainshark		X	X	
ClearSlide	X	X		X
Highspot	X	X	X	X
Lessonly		X	X	
Mediafly	X	X	X	X
MindTickle	X	X	X	X
Modus	X	X	X	X
Pitcher	X	X	X	X
SalesHood		X	X	X

Seismic	X	X	X	X
Showpad	X	X	X	X

Source: Gartner (August 2020)

Table 7: Sales Analytics

Vendor	External Content Consumption	Internal	Seller Engagement	Slide Level	Buyer Engagement	Usage	Heat Visua for Sl Train Profi
Accent	X	X	X	X	X	X	
Allego	X	X	X	X	X	X	
Apparound	X	X	X			X	
Bigtincan	X	X	X	X	X	X	
Brainshark	X	X	X	X	X	X	
ClearSlide	X	X	X	X	X	X	
Highspot	X	X	X	X	X	X	
Lessonly	X	X		X		X	
Mediafly	X	X	X	X	X	X	
MindTickle		X	X	X		X	
Modus	X	X	X	X	X	X	
Pitcher	X	X	X	X	X	X	

SalesHood	X	X	X	X	X	X
Seismic	X	X	X	X	X	X
Showpad	X	X	X	X	X	X

Source: Gartner (August 2020)

Table 8: Sales Process Integration

Vendor	Content discovery from Salesforce opportunities, using native UI integrations with Salesforce opportunities	Integration with Salesforce Activities	Bidirectional integration with Salesforce Opportunities	Methods for surfacing content recommendations to users, including predictive analytics	JIT training recommendation to users, including predictive analytics
Accent	X	X	X	X	X
Allego	X	X	X	X	X
Apparound	X	X	X		
Bigtincan	X	X	X	X	X
Brainshark	X		X	X	X
ClearSlide	X	X	X	X	
Highspot	X	X	X	X	X
Lessonly	X	X		X	X

Mediafly	X	X	X	X	X
MindTickle	X		X	X	X
Modus	X	X	X		X
Pitcher	X	X	X	X	X
SalesHood	X		X	X	X
Seismic	X	X	X	X	X
Showpad	X	X	X	X	X

Source: Gartner (August 2020)

Table 9: Integration Capabilities

Vendor	Native capabilities for building custom sales applications, including custom user interfaces, workflow, and data objects	Native open API library for bidirectional integration to Salesforce Sales Cloud	Native open API library for bidirectional integration to Microsoft Dynamics 365	Native open API library for bidirectional integration to sales acceleration solutions like Outreach and XANT	Native open API library for bidirectional integration to marketing automation solutions like Marketo	Nati API l for bidir integ to sa cont train coac syst
Accent	X	X	X	X	X	
Allego	X	X	X	X		
Apparound	X	X	X	X	X	
Bigtincan	X	X	X	X	X	

Brainshark					
ClearSlide		X	X	X	X
Highspot	X	X	X	X	X
Lessonly	X	X		X	X
Mediafly	X	X	X		X
MindTickle	X	X	X	X	
Modus	X	X	X	X	X
Pitcher	X	X	X	X	X
SalesHood		X	X		
Seismic	X	X	X	X	X
Showpad	X	X	X	X	X

Source: Gartner (August 2020)

Table 10: Media

Vendor	Video upload formats such as MP3, WAV	Practice session editing before submission	Content types include: DOC, PPT, PDF, HTML5, WAV, augmented reality, MP4, YouTube, URL Links	Analysis such as keyword, sentiment, sincerity
Accent	X	X	X	X
Allego	X	X	X	
Apparound	X		X	

Bigtincan	X	X	X	X
Brainshark	X	X	X	
ClearSlide	X	X	X	
Highspot	X		X	
Lessonly	X	X	X	
Mediafly	X		X	
MindTickle	X	X	X	
Modus	X	X	X	
Pitcher	X	X	X	X
SalesHood	X	X	X	
Seismic	X	X	X	X
Showpad	X	X	X	

Source: Gartner (August 2020)

Table 11: Additional Training and Coaching Capabilities

Vendor	Speech-to-text translation of video	Predictive analytics andscoring of video	Onboarding	Continuing education	Sales methodology	Microtrain modules

Accent	X	X	X	X	X	X
Allego	X	X	X	X	X	X
Apparound			X	X	X	X
Bigtincan	X	X	X	X	X	X
Brainshark	X	X	X	X	X	X
ClearSlide						
Highspot	X	X	X	X	X	X
Lessonly			X	X	X	X
Mediafly	X		X	X	X	X
MindTickle	X	X	X	X	X	X
Modus			X		X	X
Pitcher	X	X	X	X	X	X
SalesHood	X	X	X	X	X	X
Seismic	X	X	X	X	X	X
Showpad	X		X	X	X	X

Source: Gartner (August 2020)

Recommended by the Authors

Virtual Selling Emerges as a Priority for CRM Sales Technology Programs

Recommended For You

How to Make IR's Written Communications Unique for Investors

Agile Principles Can Simplify RPA Governance

Technology-Focused Provision Process Redesign (BigRoof*)

Use a Rapid Assessment Model to Prioritize Product Management Efforts

Communicating Alternatives Not Pursued

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