

VENDOR SELECTION MATRIX™ SALES ENGAGEMENT MANAGEMENT SAAS AND SOFTWARE

THE TOP 15 GLOBAL VENDORS 2020

Research In Action

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RESEARCH IN ACTION
independent research & consulting

FOREWORD

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation where 60% of the evaluation is based on a survey of enterprise IT or business decision makers. This is balanced by analyst subject matter expert input fed by a combination of intensive interviews with software vendors and their clients, plus an informed, independent point-of-view - all of which combine to make Research in Action Vendor Selection Matrix™ reports so unique. For this report, we interviewed 1,500 business managers with budget responsibility in enterprises globally. We selected and profiled the Top 15 vendors with the best evaluation scores from the buyers, disregarding those with too few evaluations.

In 2010, I helped Forrester Research invent and define the term Sales Enablement and I still speak regularly on podcasts and at conferences about this topic. Here is an update on how companies are automating their Sales Engagement Management process, as I now prefer to call it. We show that 48% of companies are investing here for the first time – an automation market perhaps coming to the end of its “early-adopter” phase and about to mature, aggregate and consolidate.

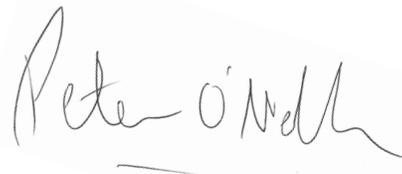
Clearly, there is great demand for these platforms. Indeed, the current crisis increases that sense of urgency to equip sellers to interact with their contacts virtually, digitally.

Although we say comparative, this is really a “vendor landscape” – listing the vendors most highly regarded by users. Geographical, segmentation and functional variations mean that they are not always direct competitors. In fact, most respondents deploy at least two to cover their needs. As well as the ratings, we also asked respondents whether they would recommend the vendor to their peers: the percent of affirmatives is documented as the Research In Action Recommendation Index; it ranges in this landscape from a worrying 83% to an outstanding 96%.

This report provides you with a useful guide to important SEM trends and will help you make an informed decision regarding which vendors could best fit your requirements and earn a more detailed review.

Always keeping you informed!

Peter O’Neill



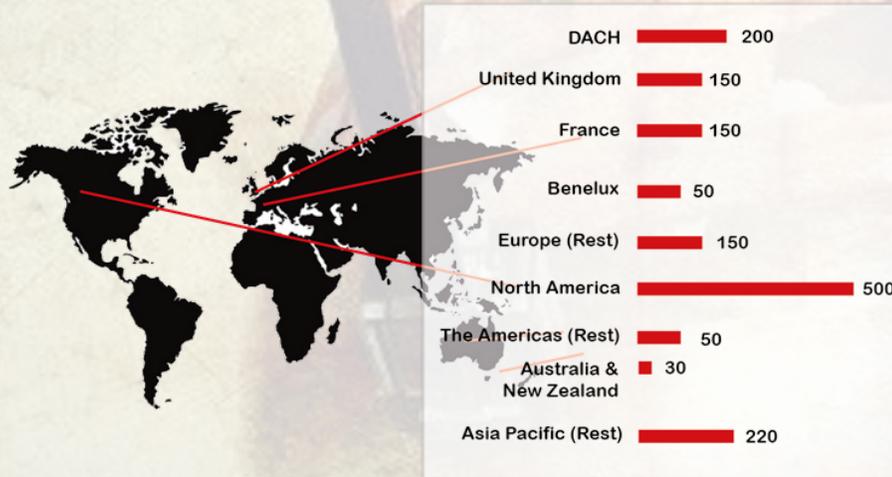
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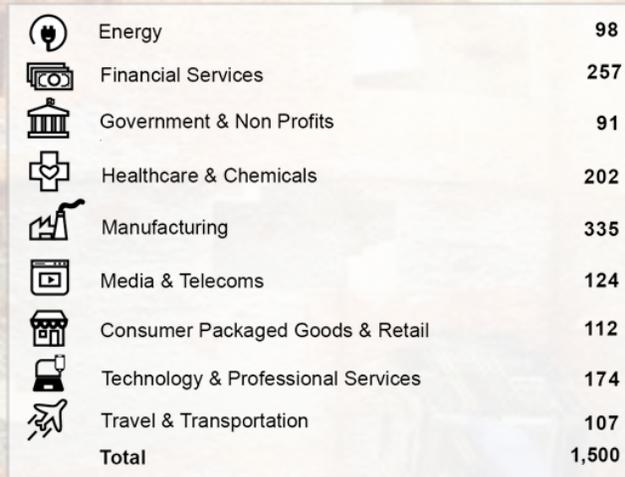


THE VENDOR SELECTION MATRIX™ METHODOLOGY

COUNTRY BREAKDOWN



INDUSTRY BREAKDOWN



RESEARCH FACTS

100,000+
Data Points

1,500
Business Manager

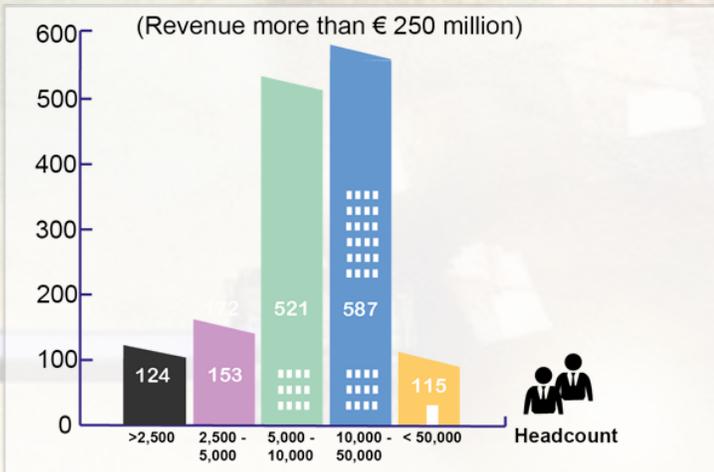
TOP 20
Vendors

30+ Reports
in 2020

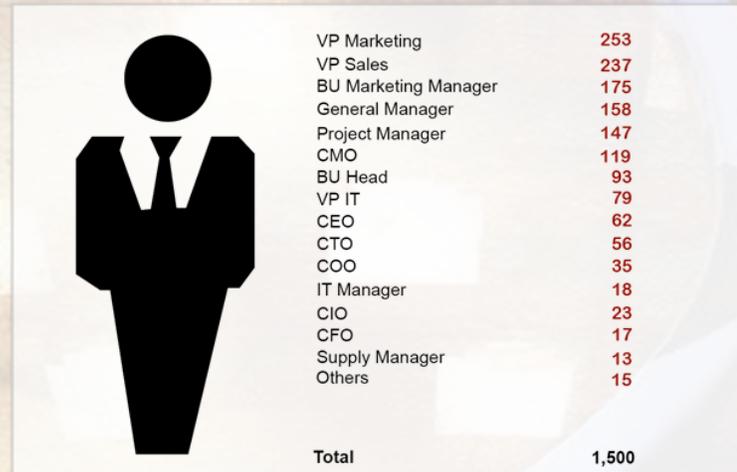
40%
Analyst's
Opinion

60%
Survey
Results

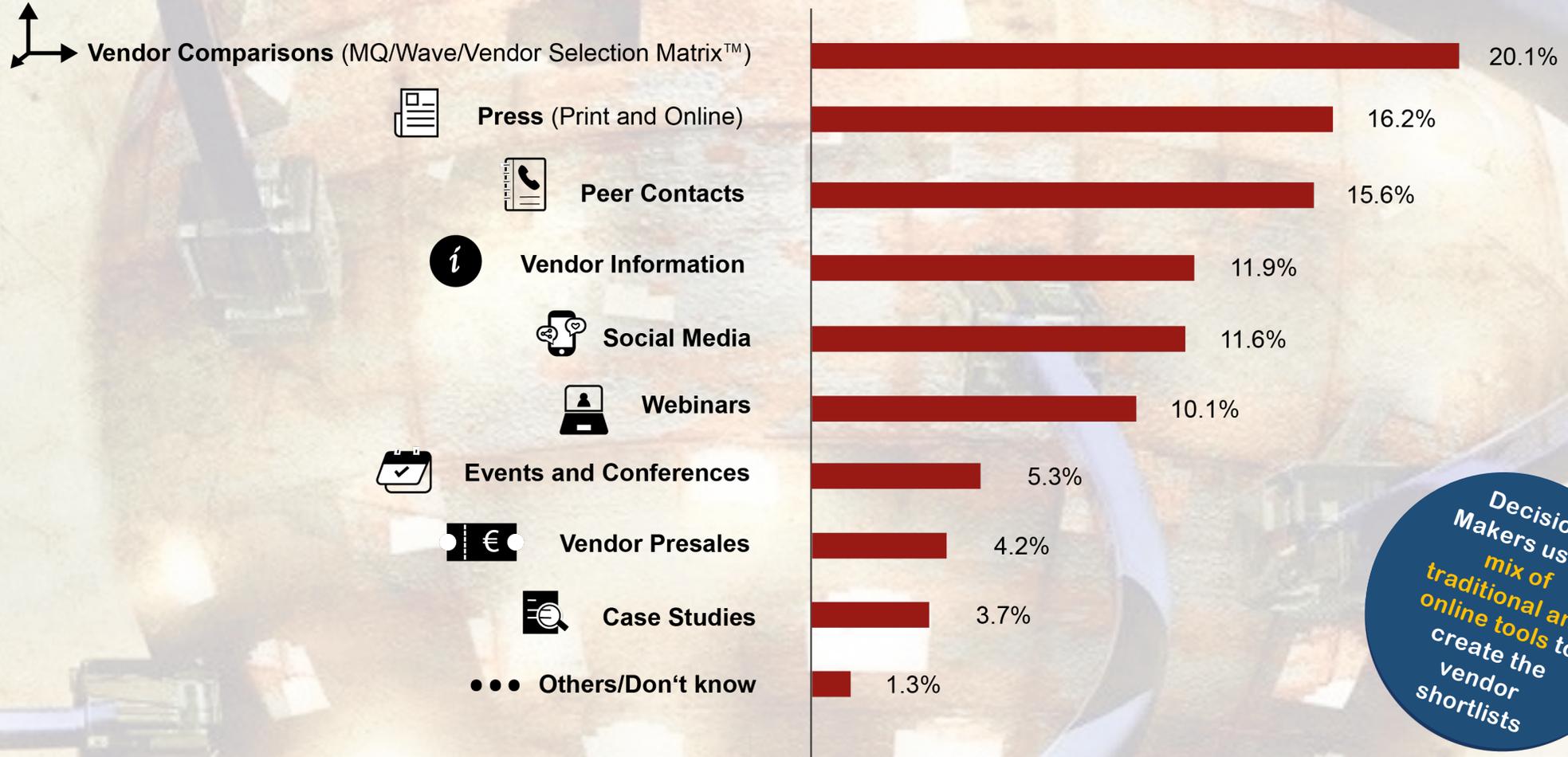
COMPANY SIZE BREAKDOWN



JOB TITLE BREAKDOWN



WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?



Decision Makers use a mix of traditional and online tools to create the vendor shortlists

N = 3,000 Business and IT Managers with budget responsibilities.



WHAT IS SALES ENGAGEMENT MANAGEMENT?

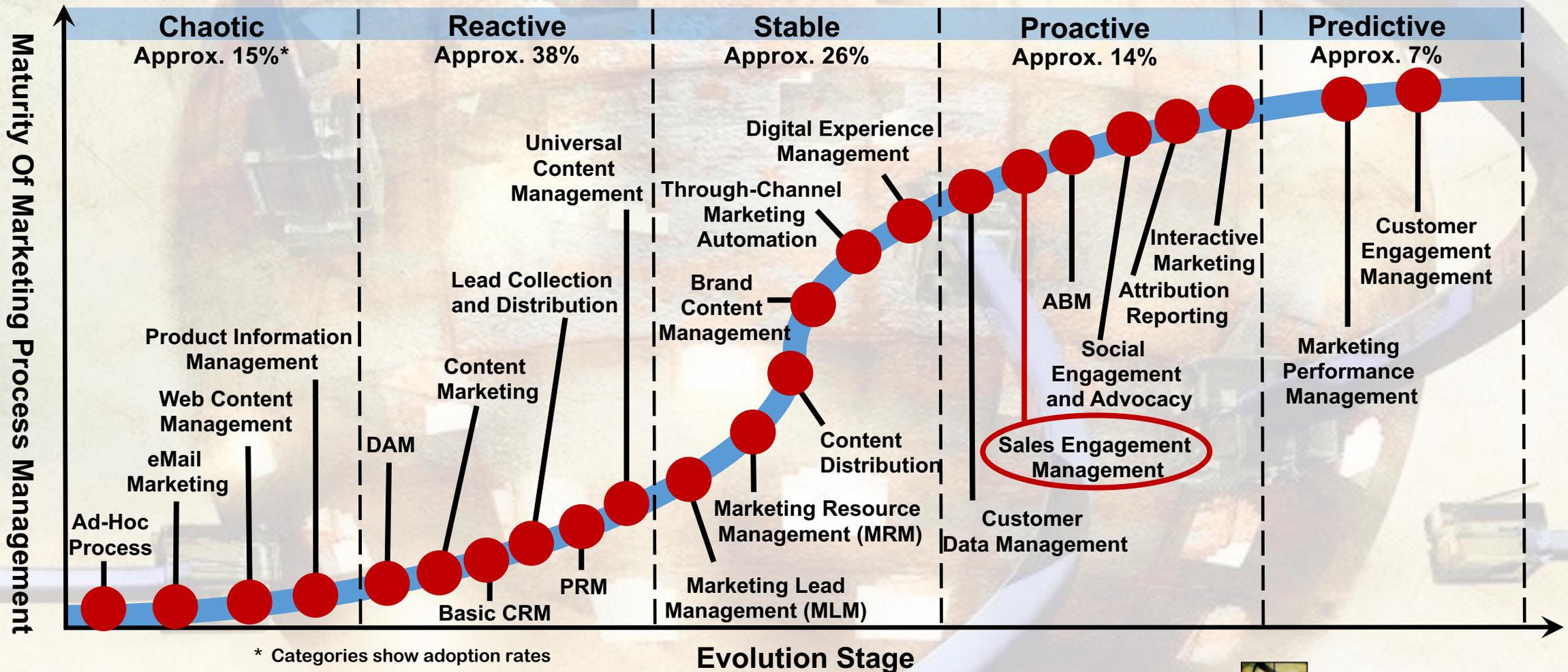
- The Sales Engagement Management (SEM) process is maturing from:
 - An initial phase of marketers providing relevant digital assets to a salesperson to support their customer interactions;
 - Through supporting content personalization, distribution and external sharing in the interests of a superior buying experience;
 - To the integration with sales training modules delivered on-demand plus sales operational functions so that a sales professional has a fully-functioning integrated “office” system.
- Whether in the field or in inside-sales, the modern sales professional needs to manage and share content in a multitude of forms, communicate with customers via email, phone, messaging, and video, and understand engagement via advanced content analytics.
- The SEM process reflects the business users' point of view. Product taxonomy categories, lovingly defined by research companies and/or product managers from their typical technological POV, in context of this overall process include *Sales Enablement*, *Sales Acceleration* (aka contact/meeting management), *Sales Training and Coaching*, *Sales Operations*, and *Sales Analytics*.

In this report, Research In Action evaluates SEM customer needs and requirements. It provides market feedback on each of the Top 15 vendors who were mentioned and rated, unprompted, by the 1,500 global survey respondents when this definition was offered.



MATURITY S-CURVE FOR MARKETING MANAGEMENT

Our surveys and consulting work enable us to continually assess the maturity of marketing organizations (combination of organization, process and technology) and we observe these five phases – Sales Engagement Management projects mostly occur later in the maturity progression.



MARKETING AUTOMATION MARKETEXTURE

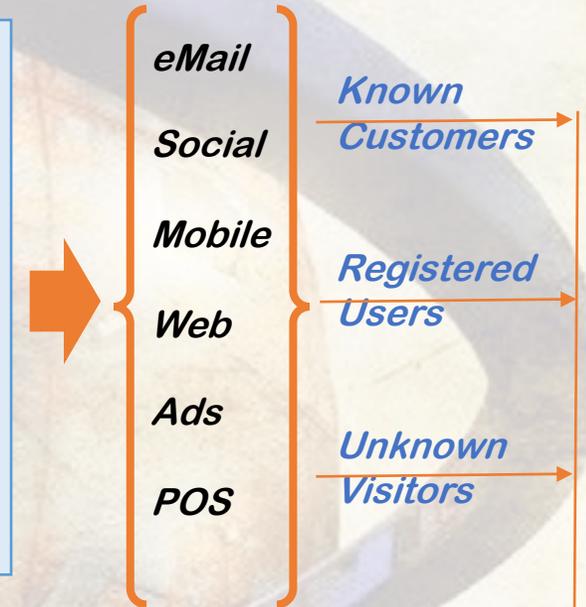
Plan & Manage



Target



Engage



Analytics

Reporting Dashboards	Predictive and Recommendation	Data Mining and BI	Audience Insights	Closed-loop Attribution	Econometric Modelling	Mobile/Site Analytics	Spend Optimization
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Data Management

Collection	Targeted Audiences	Look-a-like Audiences	Adaptive Segments	Subscriber Management	Audience Scoring	Partner Audiences	Consent and Compliance
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RESEARCH: WHICH TOPIC IS PRIMARILY DRIVING YOUR INVESTMENT IN SEM AUTOMATION IN 2020?



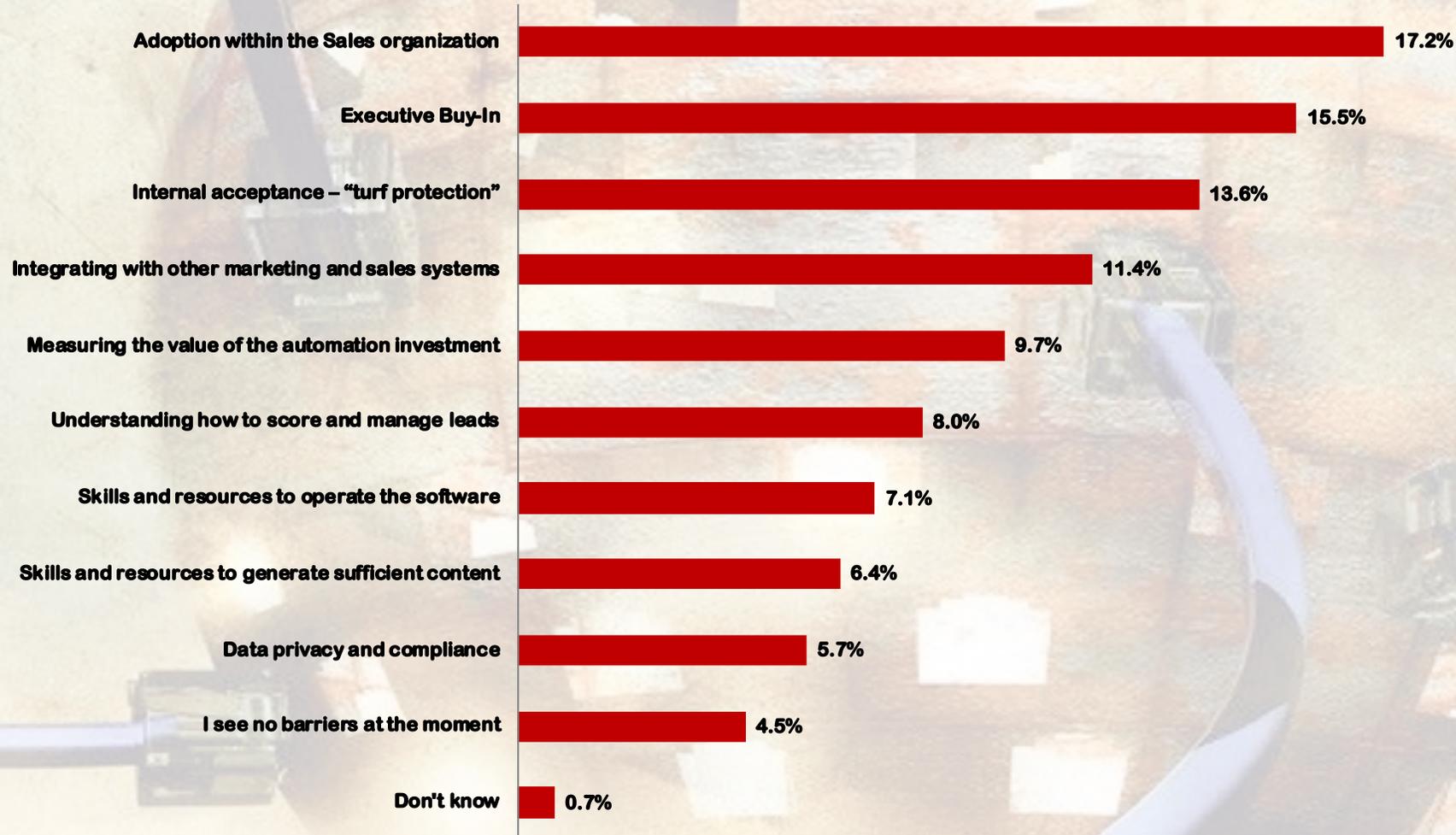
N = 1,500 Business Managers with budget responsibilities

Comments:

- The #1 driver is getting better content to sales. Helping sellers to find and customize content; then collecting analytics about content deployment. One of these two topics were chosen by one in four respondents.
- The general sales success factor, acquiring new customers, is chosen as third. This shows the relative importance of contact/meeting solutions within the process.



RESEARCH: THE TWO MOST SIGNIFICANT BARRIERS YOU FACE/FACED FOR ADOPTING SEM AUTOMATION?



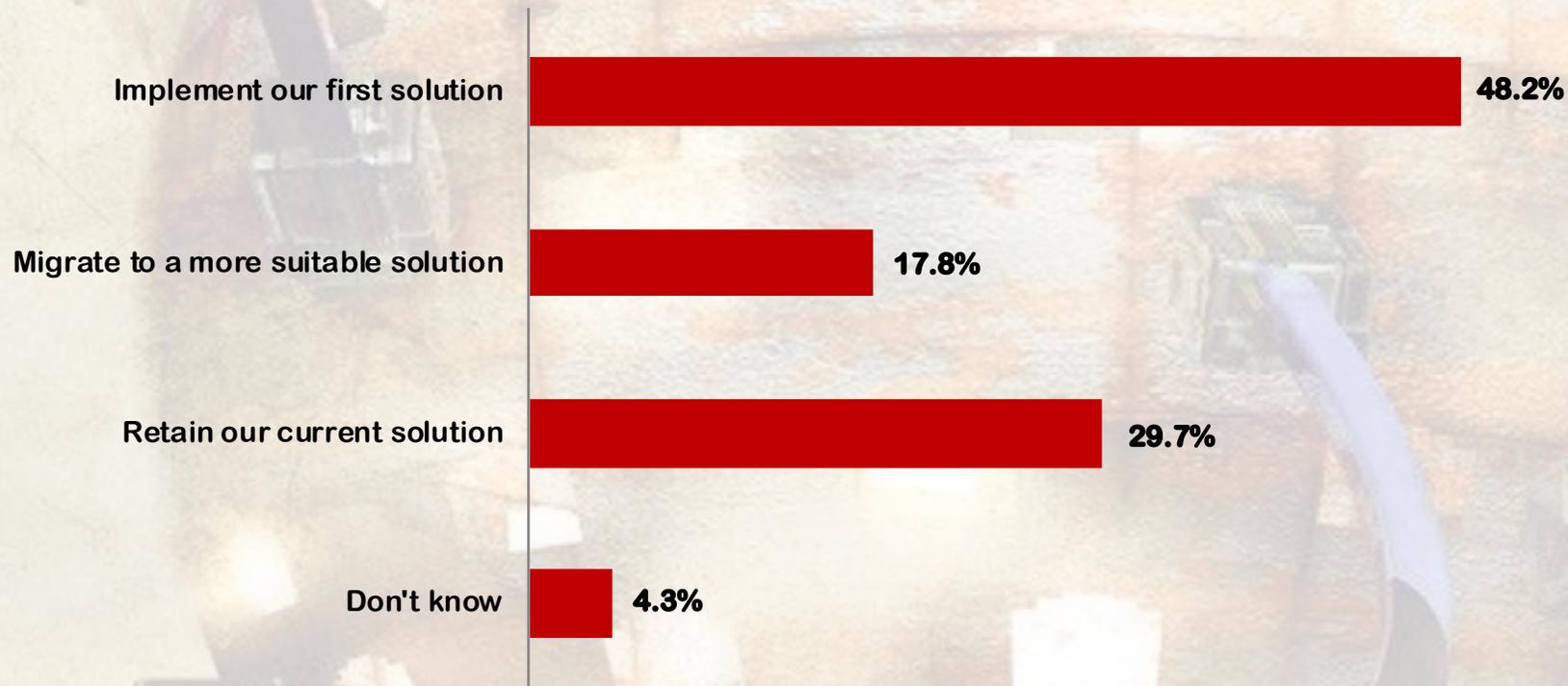
Comments:

- The most overriding concern is seller adoption – will they use the system after it has been set up for them.
- The executive buy-in barrier is similar - will sales executives allow or encourage sellers to use the system. They are wary of too many systems being put in front of sales.
- The barrier value of investment is unusually high in this survey. Users and vendors must agree on the intended benefits before the project and then focus on setting the system up accordingly.

N = 1,500 Business Managers with budget responsibilities



RESEARCH: ARE YOU PLANNING TO IMPLEMENT OR REPLACE YOUR SEM SYSTEM IN THE NEXT 1-3 YEARS?



N = 1,500 Business Managers with budget responsibilities

Comments:

- Close to half of the companies surveyed will begin their first project.
- This automation topic is still in the early-adopter phase and almost all vendors can enjoy market growth.
- A more exacting RFP process is only just starting to be applied by buyers. Many are buying the first product they see.
- The high close-rate means that marketing concepts like thought leadership or value-based story telling have not yet taken hold.



RESEARCH: WHAT ARE YOUR TOP THREE PRIORITIES WHEN CONSIDERING AN SEM VENDOR?



N = 1,500 Business Managers with budget responsibilities

Comments:

- Solution fit is always the #1 priority.
- The importance of local and regional support is highly significant. Most of the vendors listed in this report are US-headquartered – many are opening up offices in EMEA to provide local support. There are also some EMEA vendors now expanding in North America.
- The desire for content and sales training to be offered by one vendor is scored quite low. Enterprises often have a standard LMS which is preferred.



INSIGHTS: TOP SEM MARKET TRENDS 2020

- **SEM investments are needed because customer experience starts with the buying experience.** There is a clear drive in most sectors to optimize the customer experience. This includes the buying phase: whether planning a complex purchase or just routinely ordering replenishment supplies. The introduction of SEM tools can transform the buying process.
- **The 2020 health and economic crisis accelerates demand for SEM.** Sellers will have to rely on digital platforms to share content and communicate with buyers. For security and compliance reasons, a company-wide SEM platform is preferable to each seller doing their own thing.
- **SEM projects are often consolidation projects.** SEM investment projects will rationalize the current myriad of centrally-installed and self-loaded applications found on a seller's device; providing one platform of robust tools for sellers to use in their engagement with increasingly informed buyers. It will support sellers in their internal collaboration, as well as optimizing and supporting them for all communications with external parties.
- **SEM winners will provide the best seller experience.** The greatest barrier to success for SEM is seller adoption. Successful SEM solutions will focus on providing the optimal selling experience through superior integrations, an empathetic user interface, adaptability and device-flexibility.
- **SEM analytics and guidance will become mission-critical.** A bad customer experience happens when sellers call on the wrong contacts at a bad time with unhelpful information. Companies will not only expect SEM system to avoid that scenario, they will prefer solutions that proactively generate an optimal experience for both parties.



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT: THE TOP 15 GLOBAL VENDORS 2020

VENDOR NAME	PRODUCT(S)
ACCENT TECHNOLOGIES ¹	Accent Connect, Accent CRM Supercharger, Accent Accelerate
APPAROUND ¹	Apparound
BIGTINCAN	Bigtincan Hub
BRAINSHARK	Brainshark Pro, Brainshark Premier
CLEARSLIDE	ClearSlide
HIGHSPOT	Highspot
MEDIAFLY	Mediafly
PITCHER	Pitcher
PROLIFIQ ¹	Prolifiq Sales Enablement Suite
SALESLOFT	SalesLoft Sales Engagement Platform
SALESPHERE	SalesSphere
SAP	SAP Sales Cloud, Litmos for Customer Experience Edition
SEISMIC	Seismic, Percolate
SHOWPAD	Showpad Sales Enablement Platform, Showpad Coach
ZOOMIFIER (CUSTOMSHOW)	Zoomifier SalesHub, CustomShow

This vendor landscape is a mix of

- sales enablement (content and/or training) providers
- sales acceleration platforms.

Most respondents work with two or more of these vendors.

SAP also resells Mediafly as a certified SAP Sales Cloud extension.

Other Vendors outside of the Top 15 or with fewer than 15 evaluations:

- CIRRUS INSIGHTS
- CLIENTPOINT
- DOCSEND
- GROOVE
- JOURNEY SALES
- OCTIV
- OUTREACH
- PREDICTIVE PLAYBOOKS (from XANT)
- VANILLASOFT
- YESWARE

¹ These vendors did not provide a direct briefing to the Research In Action analysts.



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT: THE TOP 15 GLOBAL VENDORS 2020 - QUICK FACTS

NAME	STAFF	REVENUE ¹	GROWTH	RI ²	GOOD TO KNOW
ACCENT TECHNOLOGIES	200	< \$ 10 m	10% p.a.	84%	Accent provides AI-driven revenue enablement.
APPAROUND	100	< \$ 10 m	15% p.a.	83%	Apparound digitizes sales.
BIGTINCAN	150	< \$ 50 m	35% p.a.	91%	Bigtincan powers customer-facing staff in today's digital economy.
BRAINSHARK	220	< \$ 50 m	15% p.a.	95%	Brainshark focuses on data-driven sales readiness within SEM.
CLEARSLIDE	100	< \$ 150 m	20% p.a.	96%	ClearSlide provides a full SEM platform for mid-sized enterprises.
HIGHSPOT	450	< \$ 50 m	100% p.a.	92%	Highspot supports guided sales experiences and with patented AI.
MEDIAFLY	110	< \$ 50 m	50% p.a.	93%	Mediafly provides method-based enterprise-level sales engagement.
PITCHER	63	< \$ 50 m	60% p.a.	89%	Pitcher redefines the way sales engages and interacts with customers.
PROLIFIQ	100	< \$ 10 m	15% p.a.	85%	Prolifiq brings the relationship back into CRM.
SALESLOFT	500	< \$ 100 m	150% p.a.	91%	SalesLoft is the leading communication solution in this SEM landscape.
SALESPHERE	20	< \$ 10 m	150% p.a.	94%	SalesSphere can leverage its early European success in new markets.
SAP	100 k	N.A.	N.A.	91%	SAP accelerates buying processes and improves sales with better customer experiences.
SEISMIC	900	< \$ 200 m	100% p.a.	96%	Seismic continues its acquisition and expansion strategy success.
SHOWPAD	450	< \$ 100 m	100% p.a.	95%	Showpad enables SEM success in enterprises globally.
ZOOMIFIER (CUSTOMSHOW)	50	< \$ 10 m	30% p.a.	87%	Zoomifier provides a brand engagement delivery platform.

¹ In the Sales Engagement Management SaaS and Software market.

² The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants (see page 3) "Would you recommend this vendor in this market to your peers - Yes or No?".



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT: EVALUATION CRITERIA

STRATEGY

Vision & Go-To-Market	30%	Does the company have a coherent vision in line with the most probable future market scenarios? Does the go-to-market and sales strategy fit the target markets and customers?
Innovation & Partner Ecosystem	20%	How innovative is the company? How is the partner ecosystem organized and how effective is the partner management?
Viability & Execution Capabilities	15%	How likely is the long-term survival of the company in this market? Does the company have the necessary resources to execute the strategy?
Differentiation & USP	35%	Does the solution have a Unique Selling Proposition (USP) and clear differentiators?

EXECUTION

Breadth & Depth Of Solution Offering	30%	Does the solution cover all necessary capabilities expected by the customers?
Market Share & Growth	15%	How big is the market share and is it growing above market rate?
Customer Satisfaction	25%	How satisfied are customers with the solution and the vendor?
Price Versus Value Ratio	30%	How do customers rate the relationship between the price and perceived value of the solution?



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT



		STRATEGY EXECUTION	TOTAL	
1.	SEISMIC	4.65	4.75	9.40
2.	CLEARSLIDE	4.54	4.73	9.26
3.	SHOWPAD	4.45	4.65	9.10
4.	BRAINSHARK	4.38	4.69	9.06
5.	HIGHSPOT	4.38	4.43	8.80
6.	SALES SPHERE	4.29	4.49	8.78
7.	BIGTINCAN	4.33	4.43	8.75
8.	SAP	4.30	4.43	8.73
9.	MEDIAFLY	4.31	4.40	8.71
10.	PITCHER	4.11	4.29	8.40
11.	SALESLOFT	4.11	4.06	8.18
12.	APPAROUND	3.94	4.18	8.11
13.	ZOOMIFIER	3.96	3.96	7.93
14.	PROLIFIQ	3.96	3.96	7.93
15.	ACCENT	3.94	3.96	7.90

Note: Potential numerical deviations due to rounding

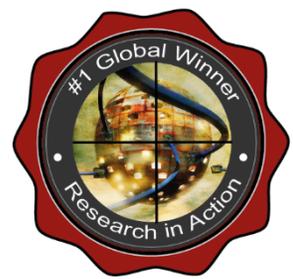


RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT

Seismic continues its acquisition and expansion strategy success

- General:** Founded 2010 in San Diego, Seismic has 900 employees in 14 offices worldwide. In 2018, it grew organically and through the acquisition of Savo. A further acquisition, Percolate in Nov. 2019, means that Seismic has grown by 140% over the last seven years. Percolate offers marketing resource management and orchestration, expanding the Seismic offering significantly. Seismic has over 600 customers.
- Strategy:** Seismic provides a solution for both marketing and sales teams to deliver compelling storytelling throughout the buyer journey. With probably the largest R&D headcount in this market, and ample funding (it is a software unicorn – valuation of over \$ 1 billion), the product set is expanding further for both marketing and sales clientele. The solution also covers the emerging customer success function and caters to client needs in channel partner enablement – the most public example is IBM whose partners are cross-licensed.
- Execution:** Seismic manages and delivers content (20 million pieces in 2019) for its clients across 13 data centers around the world and supports 15 languages. It continues to market to the Tech, FSI, Healthcare, Manufacturing, and Life Sciences sectors with solution scenarios for Marketing, Sales, Sales Enablement and even Buyers. It also partners with training and coaching vendors such as Brainshark and MindTickle for that functionality. As well as being the overall global winner in the survey, the respondents also score Seismic highest in the Customer Satisfaction category. Not surprisingly, its Recommendation Index is an outstanding 96%. Seismic also received a maximum score of 5 for the Breadth and Depth of Solution Offering from the respondents.
- Bottom Line:** The vendor is the market leader in SEM with the resources to continue that success in a high-growth market. It will complete its integration of the Percolate software this year and be able to cross-sell and upsell across both installed bases. The Seismic and Percolate combination forms a storytelling platform that allows for compelling buyer experiences throughout the buyer journey. Partnerships with Outreach, GoogleSuite or SalesLoft complete a strong engagement management platform. Seismic is the only SEM vendor listed in the Forbes Cloud 100, produced in partnership with Bessemer Venture Partners and Salesforce Ventures, which recognizes the best private cloud companies in the world.



STRATEGY	RESULT
Vision & Go-To-Market	4.75
Innovation & Partner Ecosystem	4.50
Viability & Execution Capabilities	5.00
Differentiation & USP	4.50
	4.65
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	5.00
Market Share & Growth	4.75
Customer Satisfaction	4.75
Price Versus Value Ratio	4.50
	4.75



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT



ClearSlide provides a full SEM platform for mid-sized enterprises

- General:** Formed 2009 in San Francisco, ClearSlide is now owned by Corel Corporation, which continues to invest in product innovation and customer success. It strives to deliver the most intuitive, complete and open sales engagement platform, integrating content, communications and actionable insights. Over 2,000 companies use ClearSlide and it is most successful with medium-sized enterprises. ClearSlide has around 100 R&D, product management and sales direct employees, supported by Corel corporate back office resources.
- Strategy:** In 2019, it invested in new functionality around sales content management, customer success processes and analytics behind just-in-time coaching. ClearSlide sees itself as a true SEM: as well as content management and delivery, it offers unique engagement functions such as virtual meetings, presentation sharing, meeting logging/transcribing. It also has sales communication functions such time-based email posts.
- Execution:** The company sells direct under the ClearSlide brand, to sales teams or sales enablement/operations staff. Architected as an API-based platform, it integrates easily to market-leading LMS solutions and was awarded an unprecedented 5/5 for the criteria Breadth & Depth of Solution Offering. The vendor has an impressive product roadmap for 2020. The survey respondents also scored ClearSlide highest of all vendors for the Price vs Value category. ClearSlide customers are loyal and new business opportunities often happen when users change jobs. Not surprisingly, its Recommendation Index is an outstanding 96%.
- Bottom Line:** ClearSlide is well set up for the future and to take advantage of this growing market. It has a clear brand strategy and a powerful messaging framework to transport thought leadership and educate the market about the advantages of SEM. Its new sales communications functions will prove to be invaluable for sales teams that need better insights into prospect and customer engagement. Many of the leading SEM vendors are private VC-funded companies where customers need to be cautious of possible exit strategies planned by the vendor. ClearSlide is backed by strong corporate resources to ensure market reach, product breadth and depth and, most importantly, stability.

STRATEGY	RESULT
Vision & Go-To-Market	4.50
Innovation & Partner Ecosystem	4.50
Viability & Execution Capabilities	4.75
Differentiation & USP	4.50
	4.54
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	5.00
Market Share & Growth	4.50
Customer Satisfaction	4.50
Price Versus Value Ratio	4.75
	4.73



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT

Showpad enables SEM success in enterprises globally

- General:** Showpad founded in 2011 in Belgium, expanded around Europe and now has three offices in the US as well. Its 450 employees split almost 50:50 between the two regions, as does its revenues, and Showpad has nearly 1500 customers in 50 countries. It enhanced its own native content management and delivery platform with acquisitions of the sales training and coaching vendor LearnCore in mid-2018 plus the meeting intelligence vendor Voicefox at the end of 2018. The vendor continues to be well seeded with VC funding.
- Strategy:** Showpad now offers all the core capabilities of a fully native sales engagement platform: content, training and coaching. The LearnCore product brings functionality like coaching via video, testing and learning analytics and the integration of Voicefox enables transcription of meeting recordings into searchable text, to improve training and analysis. These integrations are being promoted as PitchIQ and MeetingIQ. Showpad R&D is now decentral and diverse with 15 teams in four locations, enabling a rapid response to customer demand for innovation and enhancements on a global basis.
- Execution:** Showpad has been most successful with mid-size companies but is also enjoying rapid growth in the enterprises segment with recent successes, especially in the US, such as Xerox, Daikin America and RS Components. Its open-API architecture enables Showpad to be integrated easily with the most common solutions in adjacent processes such as CRM, MLM, social and sales communication. The Showpad Recommendation Index is an outstanding 95% which matches with the vendor's current internal NPS score of 47 and over 100% net retention (in revenues). Showpad also received a maximum score of 5 for the Breadth and Depth of Solution Offering from the respondents.
- Bottom Line:** Showpad has recruited a new C-suite of experienced executives and has the resources to operate as a successful software provider and ride the market growth forecast for sales engagement management. The vendor recently installed a new VP Partnerships to enable growth through the systems integrator, agency, and sales consultant channel. The founders, both still active, will continue to inspire an innovation strategy at their company.

STRATEGY	RESULT
Vision & Go-To-Market	4.50
Innovation & Partner Ecosystem	4.25
Viability & Execution Capabilities	4.50
Differentiation & USP	4.50
	4.45
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	5.00
Market Share & Growth	4.50
Customer Satisfaction	4.50
Price Versus Value Ratio	4.50
	4.65



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT



Brainshark focuses on data-driven sales readiness within SEM

- General:** Brainshark, from Waltham, MA, is the oldest SEM vendor, having formed in 1999. It has over 1,100 customers with a total of 1.5 million users and employs over 200 staff. Noting a bifurcation of the sales engagement process into sales readiness (training and coaching) and sales content management, it decided to focus all future investments on the former. But its content management products are still maintained and used by most customers.
- Strategy:** The vendor offers the SaaS-based Brainshark Pro and Brainshark Premier. Brainshark Pro includes content management and learning capabilities to support various sales readiness categories: onboarding, training, product launch programs and more. Brainshark Premier includes all the features and benefits of Pro, plus coaching and Machine Analysis, an AI-powered engine which analyzes and scores recorded sales videos. Brainshark also has strategic integrations with SEM vendors Highspot and Seismic, as well as with Microsoft Outlook to share Brainshark content directly via email. In 2020, they're focusing on integrating scorecards into their platform (as a result of the acquisition of Rekener in late 2019) to enable customers to visualize data to gain insight into sales readiness and performance.
- Execution:** Brainshark sells direct through inside sales and field staff to sales enablement teams in mid-market and enterprise organizations. It targets various industries including technology, manufacturing, medical device, life sciences and financial services. Until now the vendor has been active exclusively in North America and addressed Europe through various referral partners. It also has several value-added partners in the sales consulting community. It is also in the early planning stages of opening a London field office. The survey respondents scored Brainshark highest of all vendors for the Price vs. Value category and not surprisingly, its Recommendation Index is an outstanding 95%. Brainshark also received a maximum score of 5 for the Breadth and Depth of Solution Offering from the respondents.
- Bottom Line:** Brainshark has made a clear commitment to the readiness side of sales engagement and now competes more with training vendors like MindTickle and LearnCore (now Showpad). But the content management modules enjoy a large (larger than some of the newer SEM vendors) and loyal user base, which got them into this matrix.

STRATEGY	RESULT
Vision & Go-To-Market	4.50
Innovation & Partner Ecosystem	4.25
Viability & Execution Capabilities	4.00
Differentiation & USP	4.50
	4.38
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	5.00
Market Share & Growth	4.25
Customer Satisfaction	4.50
Price Versus Value Ratio	4.75
	4.69



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT

Highspot supports guided sales experiences and with patented AI

- **General:** Highspot founded in 2012 in Seattle and now has 450 employees located there, in London, or remotely. In 2019, it doubled its customer base and Deloitte reports that revenues have grown by over 3,000% in the last three years. The vendor also received a massive Series D round of funding of \$ 115 million in 2019, enabling it to continue its product innovations around sales pitching, actionable analytics, sales acceleration and the recently-released SmartPage™ technology.
- **Strategy:** Highspot delivers a modern SaaS platform for sales plays, communication and training on top of a content management system that, according to Highspot “optimizes the buyer experience”. It delivers relevant, real-time information to sellers, such as content usage information, news and information about prospects and deep integration with the most popular CRM systems ensures all prospect information is available through one interface only. The system, which integrates with over 75 different third-party technologies, is also used to enable channel partners by several Highspot customers.
- **Execution:** Highspot is a born-in-the-cloud vendor and goes to market in the SaaS manner with inside sales, field sales and strong customer success team. The product’s ease-of-use reputation has enabled them to displace multiple leading SEM vendors as those customers need re-launch their SEM project due to poor adoption. The vendor is enjoying growth around the world and recently expanded its EMEA operations beyond the UK and Ireland with a Munich office serving Austria, Germany, and Switzerland. It also partners strongly with various sales consultant or sales acceleration companies. Its Recommendation Index is a strong 92%.
- **Bottom Line:** Highspot is managed by a C-suite of experienced executives and has the resources to operate as a successful software provider and ride the market growth forecast for sales engagement management. It has a clear brand strategy, a powerful marketing and sales engine plus a satisfied client base. It is on track to continue its growth path in the future. The vendor promotes and supports a variety of community activity through its own and other brands, which helps to create more interest and investment in the topic of sales engagement management.

STRATEGY	RESULT
Vision & Go-To-Market	4.25
Innovation & Partner Ecosystem	4.50
Viability & Execution Capabilities	4.75
Differentiation & USP	4.25
	4.38
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.50
Market Share & Growth	4.50
Customer Satisfaction	4.50
Price Versus Value Ratio	4.25
	4.43



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT



SalesSphere can leverage its early European success in new markets

- **General:** SalesSphere has 20 staff as a subsidiary of the conglomerate mVise AG with nearly 200 employees. Founded in Germany in 2001, it is building up an impressive roster of customers such as Bosch, BMW, Bayer and Deutsche Bahn. The SaaS SEM platform is being selected because it is tuned to European security and privacy regulations; is strong in mobile device support; and easily connects a company's direct sales with eCommerce initiatives. The standard SEM functions of guided selling, content management and sharing is augmented by transactional capabilities such as configure/price/quote and an ERP-integrated shopping cart.
- **Strategy:** As well as the enterprise business cited above, the SalesSphere API-based system is also offered to German-based SMBs via a Deutsche Telekom. It is also resold by several product partners in adjacent markets such as content management and product information management. SalesSphere plans to expand across central Europe and into North America in the near future.
- **Execution:** The SMB-facing partnerships continued in 2019 with Sage Software and Riversand Technologies. The solution is also being enhanced to cover the needs of other customer-facing departments like field service and consulting. SalesSphere is often sold as a “white label” solution: the software hidden under the corporate design of the operating company. The respondents scored SalesSphere highest in the Customer Satisfaction category. And, not surprisingly, its Recommendation Index is an outstanding 94%.
- **Bottom Line:** SalesSphere has designed its SEM solution based upon the needs of European companies and is unique in that it supports multiple sales channels, including digital, and not just the sales force. This is a large challenge for many enterprises: often the eCommerce websites operate independently, and field sellers are not informed of their customers' activities through other digital channels. Although a European initiative, the privacy regulation framework GDPR is likely to be adopted or copied across other international markets and so SalesSphere has a head start in meeting those needs internationally.

STRATEGY	RESULT
Vision & Go-To-Market	4.50
Innovation & Partner Ecosystem	4.25
Viability & Execution Capabilities	4.00
Differentiation & USP	4.25
	4.29
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.50
Market Share & Growth	4.00
Customer Satisfaction	4.75
Price Versus Value Ratio	4.50
	4.49



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT

Bigtincan powers customer-facing staff in today's digital economy

- **General:** Founded 2011 in Sydney, Australia, Bigtincan empowers sales and service professionals to be more successful and productive. It now has 400+ customer deployments across 6 continents, a total of over 200,000 users and focuses on large enterprise customers across 8 key sectors. The solution is now available in 25 languages in 50 countries. Through the 2018 acquisition of Zunos, it also offers a micro-learning and video coaching platform.
- **Strategy:** The vendor stresses its Ai capabilities, providing guided selling through content recommendations prompted by previous content usage data. It expanded its sales enablement offering, particularly to the tech sector, by acquiring Veelo in July 2019; its coverage of service and field engineering processes by acquiring Asdeqlabs in September 2019; and added document automation services after acquiring Xinn in the same month. The core of Bigtincan's product success, though, is probably its mobile SDK for building custom sales applications
- **Execution:** In addition to direct sales, Bigtincan captures much of its client base through the sale channels of equipment providers such as Apple, AT&T, Telefonica and Verizon. In 2020, it is extending its data center investments with redundant systems in all regions, adding dedicated resources focused on driving customer success and value; and building on its leadership in data science and AI by creating a Machine Learning platform to leverage increased data streams. Its Recommendation Index is a strong 91%.
- **Bottom Line:** Bigtincan is focused on producing tailored sales engagement management software for its target industries and use cases. These are technology, telecom, large-scale retail, financial services, energy, manufacturing, and life sciences. It is the preferred solution for mobile-first sales enablement projects across all these sectors.

STRATEGY	RESULT
Vision & Go-To-Market	4.25
Innovation & Partner Ecosystem	4.25
Viability & Execution Capabilities	4.75
Differentiation & USP	4.25
	4.33
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.50
Market Share & Growth	4.50
Customer Satisfaction	4.50
Price Versus Value Ratio	4.25
	4.43



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT

Mediafly provides method-based enterprise-level sales engagement

- **General:** Mediafly, in Chicago, first offered digital content management for promoting video content in the media sector in 2010. Now its solution is sold to enterprises in many different sectors while success continues in the now much-more commercial media and entertainment industry. With over 250 customers, around 120,000 professionals use the platform globally, primarily sellers using the Mediafly presentation builder to create customized presentations on mobile devices, even in regulated industries.
- **Strategy:** In addition to its competitive SEM platform, Mediafly promotes its own selling method called Evolved Selling™. As well as being the only SEM vendor offering its own mix of software and services, it was also the first to run a freemium business model, with a (\$ 100/100 users/100 days) offer. The “100 by 3” promotion helps one teams to gain experience and then encourage wider adoption within the enterprise - the vendor claims a 75% success rate with significant enterprise licensing resulting. The Aug 2019 acquisition of iPresent, a smaller-scale SEM software enables this land and expand program.
- **Execution:** The acquisition of iPresent also expanded the vendor’s presence to the UK. The European Union is coming next, but they already have a significant presence in central Europe through their status as an SAP-endorsed app (indeed, some of the feedback on SAP in this survey may well have been about the Mediafly product specifically). The Mediafly strategy is focused on growing relationships with customers over time and they enjoy a 110% net retention rate in value. Its Recommendation Index is a strong 93%.
- **Bottom Line:** The Mediafly value proposition addresses the two customer issues identified in our survey: seller adoption and proving the value of the investment, recognizing that most SEM projects are not lost to a competitor but cancelled internally. A privately-held firm enjoying steady growth and understanding how to maximize lifetime customer value, Mediafly certainly has the necessary resources and seasoned executives to build out their presence, both in their installed base and across new business opportunities.

STRATEGY	RESULT
Vision & Go-To-Market	4.50
Innovation & Partner Ecosystem	4.00
Viability & Execution Capabilities	4.50
Differentiation & USP	4.25
	4.31
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.50
Market Share & Growth	4.25
Customer Satisfaction	4.25
Price Versus Value Ratio	4.50
	4.40



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT

SalesLoft is the leading sales acceleration solution, and the only one, in this SEM landscape

- **General:** SalesLoft helps sellers to generate pipeline, manage deals, engage with customers, optimize activities and performance and even align with marketing programs. With 500 employees in the US, UK and Mexico, it supports over 2,500 companies, mainly cloud software firms. The solution enables sellers to plan and execute their sales calls and playbooks, providing analysis and actionable feedback on the conversations. It also helps sellers and sales leaders manage deals, address deal gaps, and forecast more accurately.
- **Strategy:** The vendor talks about “sellers being loved” – another way of stressing the importance of the buying, or even the selling, experience as discussed earlier in this report. A frequent part of the sales tech stack alongside sales enablement software that manages content and/or training modules, SalesLoft completes the true SEM platform that firms seek. In 2019, it added to its own solution by acquiring Costello (opportunity management) and Noteninja (conversation intelligence). The capabilities are now native to SalesLoft, expanding its addressable market to include pre-sales, sales, and post-sales roles in the existing customer base and to more industries as established companies modernize and digitize their selling processes, execution, and outcomes.
- **Execution:** The vendor sells its solution 99% direct and leverages a network of referral partners consisting of sales trainers, business advisors and even CRM implementors focused on SMB needs. Its larger partner ecosystem, with integrations and an element of referral, is an impressive list of vendors in the adjacent markets: CRM, video platforms, sales data & analytics, email & chat, and ABM. Its Recommendation Index is a strong 91%.
- **Bottom Line:** The SEM survey named several sales acceleration vendors, usually used in tandem with sales content and training platforms, but only SalesLoft was rated strongly enough to be included in the Market Leaders quadrant. Its software covers much more of the sales engagement lifecycle than the others and the vendor continues to add new functionality to support enterprise-level sales programs, for inside sales and sales developers as well as for field sales and post-sales organizations. Its tight partnerships with Showpad, Seismic and Highspot plus the other vendors in the larger ecosystem, will ensure continued new opportunities to add new business to its customer base.

STRATEGY	RESULT
Vision & Go-To-Market	4.25
Innovation & Partner Ecosystem	4.00
Viability & Execution Capabilities	4.25
Differentiation & USP	4.00
	4.11
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.00
Market Share & Growth	4.00
Customer Satisfaction	4.25
Price Versus Value Ratio	4.00
	4.06



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT

Zoomifier provides a brand engagement delivery platform

- **General:** The brand CustomShow was selected and scored by the respondents to this survey. It is an enterprise presentation solution helping B2B sales to effectively engage their customers and, in 2018, was acquired by Zoomifier Corporation and is now tightly integrated into Zoomifier SalesHub, a full SEM solution. However, it continues to brand separately as CustomShow. With offices in New York, California and London, Zoomifier has over 100 customers, mostly in industries with large field-based sales forces where show and tell content, especially in rich media, continues to be important. Customers include AMC Networks, Vox Media, Discovery Communications, NBCUniversal, Hearst, and Edison Research.
- **Strategy:** Zoomifier stresses its vision of enabling sales, wowing an audience, engaging customers and closing deals. It helps marketers to create content, sellers to customize and share it (with strong video support) while collecting data and analytics to support actionable advice about improving the sales process and conversation. It promises to be a brand engagement delivery platform.
- **Execution:** When launched some years ago, CustomShow was eagerly received by the market looking for a “Powerpoint plus” solution. Those clients now have a complete SEM platform with the Zoomifier SalesHub covering customer journey design; content recommendation and other bots; sales engagement analytics, and improved CRM integration. The Recommendation Index is 87%.
- **Bottom Line:** Zoomifier is self-funded and profitable and has enjoyed the business opportunities offered in the early-adopter SEM market. As this market now matures and consolidates, the vendor will undoubtedly transform its marketing content and continue to execute a branding strategy that is able to leverage the renown of CustomShow.

STRATEGY	RESULT
Vision & Go-To-Market	3.75
Innovation & Partner Ecosystem	4.00
Viability & Execution Capabilities	4.25
Differentiation & USP	4.00
	3.96
EXECUTION	RESULT
Breadth & Depth Of Solution Offering	4.00
Market Share & Growth	4.25
Customer Satisfaction	4.00
Price Versus Value Ratio	3.75
	3.96



VENDOR SELECTION MATRIX™ – SALES ENGAGEMENT MANAGEMENT

Other Vendors Not Profiled Separately

Research In Action - Vendor Selection Matrix™
Sales Engagement Management SaaS And Software
By Peter O'Neill
Scope: Global 2020

	<u>Weighting</u>	ACCENT		APPAROUND		PITCHER		PROLIFIQ		SAP	
		Score	Result	Score	Result	Score	Result	Score	Result	Score	Result
Strategy											
Vision & Go-To-Market	30%	4.00	1.20	4.00	1.20	4.50	1.35	4.25	1.28	4.50	1.35
Innovation & Partner Ecosystem	20%	4.25	0.85	4.25	0.85	4.00	0.80	4.00	0.80	4.25	0.85
Viability & Execution Capabilities	15%	3.25	0.49	3.25	0.49	3.75	0.56	3.25	0.49	3.50	0.53
Differentiation & USP	35%	4.00	1.40	4.00	1.40	4.00	1.40	4.00	1.40	4.50	1.58
	100%		3.94		3.94		4.11		3.96		4.30
Execution											
Breadth & Depth Of Solution Offering	30%	4.25	1.28	4.50	1.35	4.50	1.35	4.00	1.20	5.00	1.50
Market Share & Growth	15%	3.25	0.49	3.25	0.49	3.50	0.53	3.25	0.49	3.50	0.53
Customer Satisfaction	25%	4.00	1.00	4.25	1.06	4.25	1.06	4.00	1.00	4.50	1.13
Price Versus Value Ratio	30%	4.00	1.20	4.25	1.28	4.50	1.35	4.25	1.28	4.25	1.28
	100%		3.96		4.18		4.29		3.96		4.43



THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

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About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.



APPENDIX: CHAOTIC AND REACTIVE PHASES DEFINITIONS

- **eMail Marketing.** The process of setting up campaigns via eMail to purchased or built-up lists of contacts.
- **Web Content Management.** The process of creating and updating content on the company website.
- **Product Information Management.** Maintaining all product data on one system to optimize product presentation across sales and marketing channels.
- **DAM (Digital Asset Management).** The storage and management of all digital files, particularly media files. Allowing marketing and other users to find, access and deploy the assets in their content.
- **Content Marketing.** Publishing digital content on the company website but also on other sites to generate additional web traffic.
- **Basic CRM (Customer Relationship Management).** In most companies, CRM was set by Sales Ops and/IT and has little marketing value. But integration to the CRM database is necessary for marketing/sales alignment.
- **Lead Collection and Distribution.** The process of collecting and qualifying inbound marketing leads from the increased web traffic generated by content marketing. Distribution of appropriately leads to Sales.
- **PRM (Partner Relationship Management).** Processes around the channel partner (reseller, distributor, etc) relationship : recruitment, registration and classification, contractual details, information exchange, and more.
- **Universal Content Management.** Combination of content management, DAM and PIM into one common system of record and management. It-centric organizations call this Master Data Management.
- **Marketing Lead Management (MLM).** Often called Marketing Automation, the backbone process family to share content and run digital campaigns, nurturing and progressing leads through all digital channels.
- **Marketing Resource Management (MRM).** The budgeting and reporting processes for marketing executives consolidate management of all asset projects plus human and financial resources to support business analytics focused on the marketing organization.



APPENDIX: STABLE AND PROACTIVE PHASES DEFINITIONS

- **Content Distribution.** Process and systems that collate, manage and distribute marketing content both from internal and external sources.
- **Brand Content Management (BCM).** Process to control the brand messaging, from corporate brand to individual messaging statements around products. Companies in a more distributed (or local) marketing environment use BCM systems to manage content across internal organizations, subsidiaries, and/or all business partners.
- **Through-Channel Marketing Automation (TCMA).** Management of brand content, plus programs and campaigns, promotions, and even leads, both down and up the distribution channel of business partners.
- **Digital Experience Management (DXP).** Creating and updating content, as personalized as possible to the consumer, and rendering it through all required digital communications channels (web, social, POS, etc).
- **Customer Data Management.** The process of consolidating and aggregation of all data from disparate systems in the company about customers - a Marketing-led initiative to ensure the data unification project is focused directly on marketing requirements.
- **Sales Engagement Management.** A process where marketers provide relevant digital assets to a salesperson to support their customer interactions, supported by training and coaching delivered on-demand.
- **ABM (Account based marketing).** A process of leveraging collected behavioral and profile data on target companies (accounts) or even individual buying decision-makers.
- **Social Engagement and Advocacy.** Processes to manage and leverage interested parties within communities and on social media.
- **Attribution Reporting.** The ability to recognize the contribution of individual pieces of marketing investment (campaigns, events, specific content assets) to business success. The success factors include metrics like deal progression through the funnel, deal value increase, deal velocity increase and deal closure.
- **Interactive Management.** Digital marketing programs that provide responsiveness and deep personalization.
- **Marketing Performance Management.** Dashboard and reporting that consolidates data from MRM, CDM and attribution reporting to list the financial return on individual and aggregated marketing investments.
- **Customer Engagement Management.** The full orchestration process, support by personalization, of providing and supporting an ongoing digital relationship with individual customers across the full customer lifecycle and organization.



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