Sales Engagement Buyers Guide

Software Provider and Product Assessment

EXECUTIVE SUMMARY

iSG® Research

Key Takeaways

Sales engagement has become a strategic execution layer within revenue organizations as enterprises address longer buying cycles, informed buyers and pressure for predictable growth. While customer relationship management (CRM) systems govern data and pipeline structure, sales engagement platforms orchestrate daily seller activity through structured cadences, multichannel outreach and measurable workflows. Organizations are prioritizing engagement capabilities that standardize execution, improve productivity and link frontline interactions directly to pipeline progression and revenue outcomes.

Software Provider Summary
The ISG Buyers Guide™ for Sales Engagement evaluates 19 software providers offering products that support outreach orchestration, cadence execution, activity tracking, conversational analytics, workflow automation, CRM integration and AI-driven next-best-action guidance. The research ranked the top three overall leaders as Salesforce, Oracle and HubSpot. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. HubSpot, Microsoft, Oracle, Oracle NetSuite, Salesforce, SAP and Zoho were rated Exemplary, with Apollo, Outreach and SugarCRM rated Innovative. Bigtincan, Seismic and Showpad were rated as Assurance, while Allego, Gong, Highspot, monday.com, Sage and ZoomInfo were rated as Merit.

Product Experience
Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%), which includes adaptability, manageability, reliability and usability. Salesforce, Oracle and HubSpot achieved the highest performance as Leaders in this category, supported by structured outreach orchestration, cadence execution capabilities and a robust platform architecture enabling governance, scalability and enterprise integration. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience
Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Salesforce, HubSpot and Oracle were the Leaders in this category, demonstrating strong customer advocacy and a clear investment in successful outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations
Enterprises should evaluate sales engagement platforms as structured execution engines that align daily seller activity with governed CRM workflows. Assessments must emphasize integration maturity, AI transparency and data capture reliability to preserve forecast integrity. Cross-functional alignment across sales leadership, operations and IT is essential to balance automation with disciplined execution and sustainable revenue growth.

The Findings

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes in line with TCO and ROI expectations. It is equally important that this commitment to customer success is evident throughout the provider's website, the buying process and the customer journey.

## Overall Scoring of Software Providers Across Categories

The research finds Salesforce atop the list, followed by Oracle and HubSpot. Providers that place in the top three of a category earn the designation of Leader. Salesforce, Oracle and HubSpot have done so in five categories.

The quadrant chart below presents ratings for Product Experience and Customer Experience on the *x*- and *y*-axes, respectively, to visually classify software providers. Those providers whose Product Experience has above-median weighted performance on the axis, in aggregate across the two product categories, place farther to the right. The performance and weighting for the Customer Experience category determine placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Sales Engagement
Overall

Providers	Grade	Performance
Salesforce	A-	Leader 82.8%
Oracle	A-	Leader 81.4%
HubSpot	B++	Leader 79.8%
Zoho	B+	73.0%
Microsoft	B+	72.9%
SAP	B+	69.9%
Oracle NetSuite	B	66.0%
SugarCRM	B-	61.8%
Outreach	B-	59.8%
Apollo	B-	57.3%
Highspot	C++	56.1%
monday.com	C++	54.3%
Gong	C++	54.3%
Showpad	C++	53.6%
ZoomInfo	C++	53.3%
Allego	C++	52.8%
Bigtincan	C++	51.6%
Seismic	C++	51.1%
Sage	C+	46.2%

Source: ISG Research
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The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. Placement represents the software providers' weighted performance in meeting the requirements of product and customer experience.

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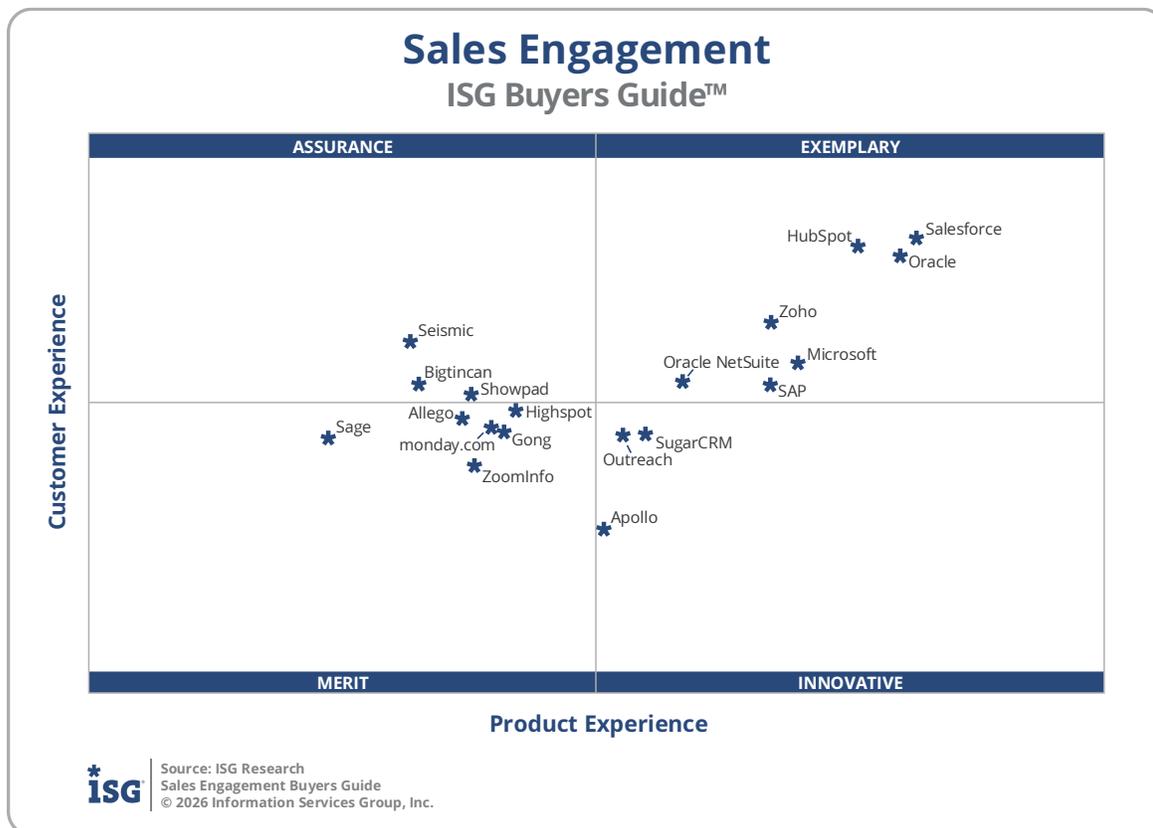
Exemplary: This rating (upper right) applies to those providers that performed above the median on Product and Customer Experience requirements. The providers rated Exemplary are: HubSpot, Microsoft, Oracle, Oracle NetSuite, Salesforce, SAP and Zoho.

Innovative: This rating (lower right) applies to those that performed above median in Product Experience but not in Customer Experience. The providers rated Innovative are: Apollo, Outreach and SugarCRM.

Assurance: This rating (upper left) applies to those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: Bigtincan, Seismic and Showpad.

Merit: This rating (lower left) applies to those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Allego, Gong, Highspot, monday.com, Sage and ZoomInfo.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent a provider's value nor indicate universal suitability of a set of products.

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