Sales Engagement
Buyers Guide

Software Provider and Product Assessment

EXECUTIVE
SUMMARY

iSG Research™

Sales Engagement

Sales engagement is an essential component that expands beyond customer relationship management (CRM), encompassing all interactions and touchpoints between sales teams and customers throughout the sales process. Its primary aim is to develop and progress opportunities by building strong relationships to effectively advance prospects through the sales and buying process. Sales engagement tools can enhance these interactions, making them more targeted, efficient and measurable.

ISG defines sales engagement as the set of digital activities and systems to manage and guide selling to reach its effective outcomes. The distinction between sales engagement and CRM in sales lies primarily in the focus and functionality of each system. CRM is fundamentally about data collection, serving as a repository for various types of information necessary for effective sales operations. This includes product details, account information, the sales organization hierarchy, individual salespeople's profiles and contact details at various accounts. CRM systems must also account for GDPR considerations and security issues related to personal information such as phone numbers and contact details. Essentially, CRM is as much about capturing and organizing data as it is about supporting the sales team.

> **The distinction between sales engagement and CRM in sales lies primarily in the focus and functionality of each system.**

On the other hand, sales engagement focuses on utilizing the data captured by the CRM. It is about using this data to streamline and enhance the interactions between salespeople and potential or existing customers. Sales engagement platforms cannot perform the functions of CRM because they do not handle all the data capture and organization aspects. Where CRM is concerned with the thorough and secure collection of sales-related data, sales engagement is dedicated to making the most of that data to optimize sales activities.

Sales engagement platforms integrate and streamline various communication channels within the CRM, such as email, phone and social media. This integration ensures that sales representatives can interact seamlessly with both prospects and customers. Automated workflows and sales activity cadences enable sales teams to follow up consistently and promptly, improving customer experiences and increasing conversion rates.

Enhanced personalization is another key element of sales engagement. Utilizing data stored in the CRM, sales engagement tools help tailor communications to meet individual customer needs and preferences. This level of personalization makes interactions more relevant, thereby increasing the likelihood of engagement and conversion.

Data-driven insights provided by sales engagement platforms play a significant role in refining sales strategies. These platforms offer analytics and tracking capabilities, revealing which interactions are most effective. Many sales engagement systems offer conversational analytics, engagement effectiveness and overall activity analysis to ensure that sales processes are continually assessed against achievement of sales and revenue objectives. By 2026, more than one-half of enterprises will recognize that modernizing processes and SFA systems will be needed to enable new data-driven features that aid in maximizing sales effectiveness to achieve revenue targets.

Sales Engagement
Market Assertion

By 2026, more than one-half of enterprises will recognize that modernizing processes and SFA systems will be needed to enable new data-driven features that aid in maximizing sales effectiveness to achieve revenue targets.

Stephen Hurrell
Director of Research, Office of Revenue

ïSG Research™

In addition, individual and team sales coaching and performance improvement are facilitated by sales engagement tools through conversational analytics and activity tracking to ensure adherence to formalized sales processes and sales methodologies. Managers can assess individual and team performance, using insights to coach sales reps and optimize their sales tactics. Sales engagement tools also aid in pipeline and opportunity management by monitoring deal progression and ensuring that no opportunities are neglected. ML and predictive analytics prioritize opportunities based on potential to close and provide guidance on next best actions.

Moreover, sales engagement platforms enhance judgement-based, opportunity-based sales forecasting by analyzing engagement data and historical trends to provide insights such as probability to close win. This helps sales teams and management make informed decisions, allocate resources effectively, and set realistic targets. Machine learning is also used to create both a computer derived aggregate opportunity forecast supplemented with estimation for sales and revenue for opportunities not yet opened and sales from sources such as self-service. Integration with CRM systems ensures that all engagement activities are logged and maintains a comprehensive record of customer interactions. This seamless integration allows for a holistic view of customer journeys, enabling better coordination between marketing, sales, and service teams.

When it comes to support for actually selling, CRMs have somewhat fallen short. Interestingly, the lack of real help for sellers or their management resulted in opportunities for start-ups offering add-on products to fill the sales engagement gap. One of the earliest examples is best classified as dialers or cadence platforms targeted at inside sales and sales development representatives with a defined structure or cadence to the activities. This includes so-called conversational analytics, where this analysis is used as part of sales coaching to improve individual performance and identify which messages resonate, and which do not. As a result, we assert that through 2026, to effectively manage critical presales staff, enterprises will look

to vendors to provide data-driven technologies to help optimize resource allocation, or risk creating bottlenecks in the sales process.

Sales engagement is the support and management of field sales. These particular add-on applications offer a thorough process of data capture, organizing information, ensuring data security, administering user access and managing reporting hierarchy structures. This includes detailing who reports to whom, the organization of product structures and how these products are aligned with pricing lists, and comprehensive oversight of various aspects, from user administration to structured roll-ups. These opportunity pipeline management views are aligned with different reporting hierarchies that are ranked or scored using ML based on what a successful sale historically looks like versus unsuccessful opportunities. But most CRM providers are yet to have an integrated sales performance management to ensure leadership can manage sales teams, including territory and quota planning, and sales incentive compensation management.

> **In contrast, sales engagement primarily concentrates on what happens once a lead transforms into an opportunity.**

In contrast, sales engagement primarily concentrates on what happens once a lead transforms into an opportunity. It focuses on the activities and strategies to advance that opportunity through to the negotiation phase and beyond. Sales engagement effectively manages the critical phase where potential sales are developed and progressed to close, ensuring that interactions are optimized for successful outcomes.

But CRM providers are not blind to what is happening. Many large providers have accelerated the development of pipeline and opportunity-management functionality. Applications to enhance sales forecasting incorporate machine language-based predictive scoring to complement opportunity-based sales forecasting. These systems also can aid in revenue forecasting by capturing non-opportunity tracked sales, deals not yet in the pipeline, and can utilize historical data to better predict product and service mix. Some providers add dialers and cadence-based playbooks to support the inside sales teams. Automatic capture of calls, meetings and messages from common personal productivity tools improves ease of use and ensures timely and accurate data collection.

More recently, providers have increased their focus on functionality that improves the buying experience, aids sellers in suggesting next best action and helps in navigating the buying organization. Providers are also making better use of data to deliver personalized metrics and self-learning skill improvement. These developments coupled with the adoption of GenAI point to the future evolution of CRM. We assert that by 2026, one-quarter of sales organizations will replace current applications with those that use AI to optimize sales and revenue performance to maximize outcomes.

CRM systems will continue to add sales engagement functionality and, if innovative, will develop a truly next-generation engagement platform offering digital collaboration across revenue teams, prospects and customers. Some providers have already introduced collaborative configure, price and quote features, while others have digital mutual action plans between buyers and sellers.

Many sales teams lack an effective, unified omnichannel selling environment with which to engage and motivate buyers purchasing products and services. With more commerce moving to a digital, omnichannel engagement, GenAI will play a larger role, not just to improve outreach or emails, but as discovery tools to better match buyers' needs with sellers' offerings. In industries using technical demonstrations as a proof point of the sales process, generative and predictive AI could bring a more automated and focused initial engagement. Support could include self-assessments pointing to a focused and tailored message or discovery answers to those engaged with the prospect.

> **Sales engagement is indispensable with CRM enhancing communication, personalization and overall sales performance.**

Sales engagement is indispensable with CRM, enhancing communication, personalization and overall sales performance. By integrating sales engagement tools, businesses can refine their sales strategies, improve customer experiences and drive growth. CRM systems are increasingly incorporating advanced functionalities, powered by analytics and GenAI, to stay relevant in a digital, omnichannel landscape. To remain competitive, businesses must ensure their CRM systems evolve to meet changing needs, integrating advanced tools and technologies. Through continuous alignment and innovation, CRM systems will continue to be powerful tools for managing customer relationships and driving business success.

The ISG Buyers Guide™ for Sales Engagement evaluates software providers and products based on specific evaluation sections including sales engagement support to coach and guide selling, help navigate selling into accounts, and ensure the support of deal rooms with sales enablement and the technical or pre-sales processes. It also must include forecasting, pipeline management, analytics and insights, business collaboration, roles and preferences to the support of the evolving use of AI and machine learning. To be included in this Buyers Guide, products must include digitally focused sales engagement capabilities.

This research evaluates the following software providers that offer products that address key elements of sales engagement as we define it: Apollo.io, Aviso, Clari, Gong, HubSpot, Mediafly, Microsoft, Oracle, Outreach, People.ai, Revenue Grid, SalesDirector.ai, Salesforce, Salesloft, SAP, Xactly, Zoho, and ZoomInfo.

Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

> " **ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business requirements in any enterprise.**

The ISG Buyers Guide™ for Sales Engagement is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for sales engagement software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for sales engagement to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of sales engagement technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment

time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of sales engagement software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating sales engagement systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.

How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.

   Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.

   Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.

   Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.

   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.

   Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.

   Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.

   Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.

   Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

## Overall Scoring of Software Providers Across Categories

The research finds Oracle atop the list, followed by Salesforce and Zoho. Companies that place in the top three of a category earn the designation of Leader. Salesforce has done so in seven categories; Oracle in six; HubSpot in five; and Aviso, SAP and Zoho in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines 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.

The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.

Sales Engagement
Overall

Providers	Grade	Performance
Oracle	B++	*Leader* 78.4%
Salesforce	B++	*Leader* 77.8%
Zoho	B	*Leader* 68.5%
Xactly	B	65.5%
SAP	B	65.4%
Salesloft	B	64.5%
Microsoft	B	63.7%
HubSpot	B	63.5%
Gong	B-	59.7%
Aviso	B-	59.2%
Outreach	B-	58.8%
Clari	B-	58.5%
Mediafly	B-	57.8%
ZoomInfo	C++	55.7%
People.ai	C++	52.0%
Apollo.io	C++	50.5%
Revenue Grid	C++	50.5%
SalesDirector.ai	C+	48.8%

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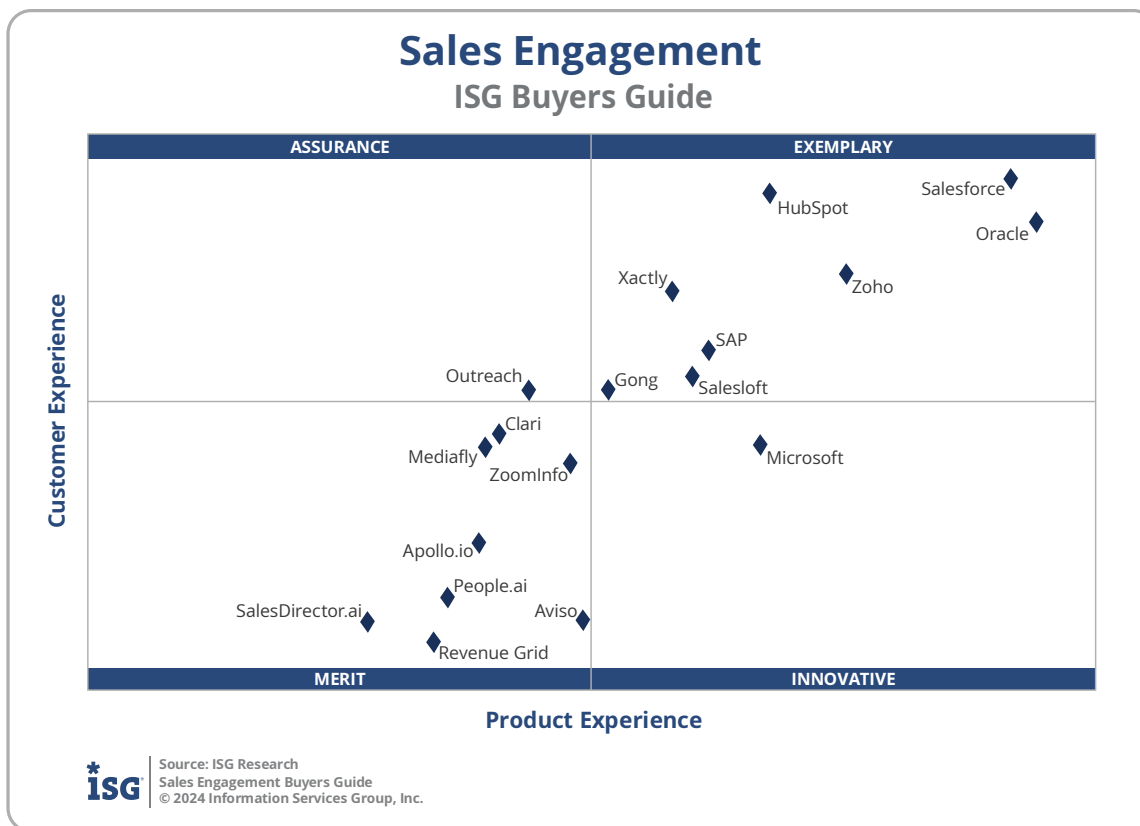
Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Gong, HubSpot, Oracle, Salesforce, Salesloft, SAP, Xactly and Zoho.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The provider rated Innovative is: Microsoft.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The provider rated Assurance is: Outreach.

Merit: The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: Apollo.io, Aviso, Clari, Mediafly, People.ai, Revenue Grid, SalesDirector.ai and ZoomInfo.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise

or for a specific process. Although there is a high degree of commonality in how enterprises handle sales engagement, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (20%), Capability (25%), Reliability (20%), Adaptability (5%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research. Oracle, Salesforce and Zoho were designated Product Experience Leaders.

Sales Engagement
Product Experience

Providers	Grade	Performance
Oracle	B++	Leader 64.4%
Salesforce	B++	Leader 63.5%
Zoho	B+	Leader 57.0%
HubSpot	B	54.1%
Microsoft	B	53.7%
SAP	B	51.7%
Salesloft	B	51.2%
Xactly	B	50.3%
Gong	B-	47.8%
Aviso	B-	47.4%
ZoomInfo	B-	46.2%
Outreach	C++	44.7%
Clari	C++	43.6%
Mediafly	C++	43.1%
Apollo.io	C++	42.8%
People.ai	C++	41.6%
Revenue Grid	C++	41.0%
SalesDirector.ai	C+	38.5%

Source: ISG Research
Sales Engagement Buyers Guide
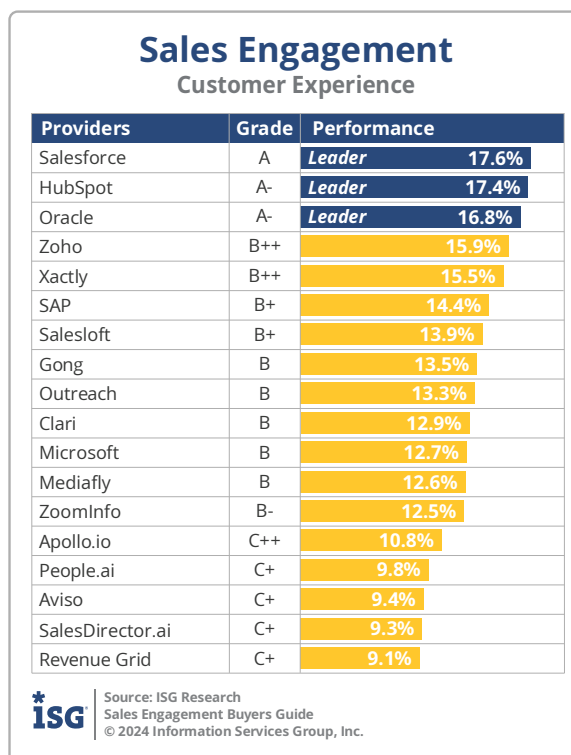© 2024 Information Services Group, Inc.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Salesforce, HubSpot and Oracle. These category leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to readily provide sufficient customer case studies that demonstrate success or that articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

Sales Engagement
Customer Experience

Providers	Grade	Performance
Salesforce	A	Leader 17.6%
HubSpot	A-	Leader 17.4%
Oracle	A-	Leader 16.8%
Zoho	B++	15.9%
Xactly	B++	15.5%
SAP	B+	14.4%
Salesloft	B+	13.9%
Gong	B	13.5%
Outreach	B	13.3%
Clari	B	12.9%
Microsoft	B	12.7%
Mediafly	B	12.6%
ZoomInfo	B-	12.5%
Apollo.io	C++	10.8%
People.ai	C+	9.8%
Aviso	C+	9.4%
SalesDirector.ai	C+	9.3%
Revenue Grid	C+	9.1%

Source: ISG Research
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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Sales Engagement in 2024, a software provider must be in good standing financially and ethically, have at least $50 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 100 customers. The principal source of the relevant business unit's revenue must be software-related and there must have been at least one major software release in the last 12 months.

For inclusion in this Buyers Guide, a software provider must include digital-focused sales engagement that supports the ability to coach and guide selling, help navigate selling into accounts, and ensure the support of deal rooms with sales enablement and the technical or pre-sales processes. Providers were also evaluated across forecasting, pipeline management, analytics and insights, business collaboration, roles and preferences to the support of the evolving use of AI and machine learning.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant sales engagement products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
Apollo.io	Apollo.io	n/a	July 2024
Aviso	Aviso Platform	n/a	August 2024
Clari	Clari Revenue Platform	n/a	August 2024
Gong	Gong	n/a	August 2024
HubSpot	HubSpot Sales Hub	n/a	August 2024
Mediafly	Mediafly	n/a	August 2024
Microsoft	Microsoft Dynamics 365 Sales	2024 release wave 1	August 2024
Oracle	Oracle CX Sales	24C	August 2024
Outreach	Outreach	n/a	August 2024
People.ai	People.ai	n/a	August 2024
Revenue Grid	Revenue Grid	2408	August 2024
SalesDirector.ai	SalesDirector.ai	n/a	August 2024
Salesforce	Salesforce Sales Cloud	Summer '24	August 2024
Salesloft	Salesloft	n/a	July 2024
Xactly	Xactly Intelligent Revenue Platform	n/a	August 2024
Zoho	Zoho CRM, Zoho One	n/a	August 2024
ZoomInfo	ZoomInfo Sales	n/a	August 2024

Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as "Providers of Promise."

Provider	Product	Product Support	Marketed as	Revenue	Customers
Boostup.ai	Boostup	No	No	No	Yes
salesdna.ai	SalesDNA	No	Yes	No	No

About ISG Software Research

ISG Software Research provides authoritative market research and coverage on the business and IT aspects of the software industry. We distribute research and insights daily through our community, and we provide a portfolio of consulting, advisory, research and education services for enterprises, software and service providers, and investment firms. Our premier service, ISG Software Research On-Demand, provides structured education and advisory support with subject-matter expertise and experience in the software industry. ISG Research Buyers Guides support the RFI/RFP process and help enterprises assess, evaluate and select software providers through tailored Assessment Services and our Value Index methodology. Visit www.ventanaresearch.com to sign up for free community membership with access to our research and insights.

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