



Sales Engagement Platforms

Tools to drive more effective interactions with prospective buyers

2024 CONSTELLATION SHORTLIST

The Constellation ShortList™ presents vendors in different categories of the market relevant to early adopters. In addition, products included in this document meet the threshold criteria for this category as determined by Constellation Research. This Constellation ShortList of vendors for a market category is compiled through conversations with early adopter clients, independent analysis and briefings with vendors and partners.

ABOUT THIS SHORTLIST

Sales engagement platforms are designed to drive both seller productivity and a more seamless interaction experience between buyers and sellers. These platforms focus on the mechanics of a seller crafting profitable 1:1 customer engagements: what to say, when to say it, where to send it and how to focus on the impact of lasting relationships.

These tools must either reside within core sales systems such as sales automation/CRM, or integrate seamlessly with them – both to draw critical sales and customer data but also to write important sales cadence and customer preference data back to the CRM. Reporting and analytics is required to better understand how sellers are engaging, and what sales actions are having the most impact. Recently, the addition of AI-based tools has amplified sales engagement platform's ability to boost both productivity of sellers and the likelihood of converting buyers. These new features include AI-powered virtual assistants, which can aid sellers in crafting more contextual, relevant and timely emails and offers, selecting the right message and/or sales content and collateral. In addition, chatbots can be deployed to capture prospect inquiries and nurture buyers prior to seller-assisted interactions.

The future of sales engagement platforms lies in its integration with broader customer experience (CX) technologies. We can expect these platforms to connect even more seamlessly with customer data platforms (CDPs), marketing automation engines, and service-driven experience tools, to better assist sellers at various stages of the customer journey. As AI matures, we'll likely see more specialized offerings tailored to specific industries, company sizes, and seller behavior/maturity levels. Additionally, with a focus on holistic customer journeys, we might see consolidation within the vendor landscape. Marketing and service solutions might integrate their engagement hubs with these systems, creating a unified platform for orchestrating and optimizing the entire customer lifecycle.












LIKE WHAT YOU SEE?

Consider partnering with Constellation Research on your go-to-market-strategy. Email ShortList@ConstellationR.com for more info.

To learn more about Constellation Research Shortlists visit: www.constellationr.com/ShortList

11 SOLUTIONS TO KNOW

Constellation evaluates more than 20 solutions categorized in this market. This Constellation ShortList is determined by client inquiries, partner conversations, customer references, vendor selection projects, market share, and internal research.

-  CLARI REVENUE PLATFORM
-  CONVERSICA REVENUE DIGITAL ASSISTANT
-  FRESHSALES
-  HUBSPOT SALES HUB
-  MICROSOFT DYNAMICS 365 SALES
-  OUTREACH
-  QUALIFIED
-  REVENUEGRID
-  SALESFORCE SALES CLOUD
-  SALESLOFT
-  SUGAR SELL

THRESHOLD CRITERIA

Constellation considers the following criteria for these solutions:

- Email, collaboration and calendar integrations
- Integrated sales communications channels including email, phone dialer, text and social
- Automated, programmable email cadences
- Prioritized actions and guided next steps for sellers
- Actions and responses triggered by customer behaviors
- AI chatbots and live chat (native or via seamless integration) to engage and nurture prospects across digital properties
- Integrated activity capture in CRM
- Security and governance controls to ensure data security and compliance
- Improved deal visibility, outcome reporting and analytics to optimize results
- Increased pipeline and forecasting accuracy
- Sales best practice identification and sharing
- AI/ML applied for smart lists, segmentation, communication recommendation and analytics
- Generative AI copilots automate message creation and engagement orchestration to best align with buyer intents and signals
- Integrations across key sales solutions including CRM, productivity, coaching, intelligence, chat, collaboration, communications (telephony and video), security and account based selling tools

ABOUT CONSTELLATION RESEARCH

As an award-winning Silicon Valley-based strategic advisory and futurist analyst firm, Constellation Research serves leaders and organizations navigating the challenges of digital strategy, business-model disruption and digital transformation. Constellation works closely with solution providers, partners, C-suite executives, board of directors, and its Constellation Executive Network of buy-side leaders to lead the way in research coverage and advise clients how to achieve valuable business results.

FREQUENCY OF EVALUATION

Each Constellation ShortList is updated at least once per year. Updates may occur after six months if deemed necessary.

EVALUATION SERVICES

Constellation clients can work with the analyst and the research team to conduct a more thorough discussion of this ShortList. Constellation can also provide guidance in vendor selection and contract negotiation.

BUSINESS THEMES



Digital Marketing & Sales Effectiveness



Next Generation Customer Experience



Future of Work



Martin Schneider Vice President & Principal Analyst

Martin Schneider has had a unique career that has spanned both analyst and marketing practitioner roles, focused on high technology and related industries. The unifying factor has always been both a keen analysis of go-to-market trends, while also having achieved success as a marketing leader. Schneider started his career as a journalist covering B2B technologies, and quickly transitioned into a leading analyst covering application software for the 451 Group in NYC, where he specialized in CRM, marketing automation, and business intelligence/analytics technologies.

