



# The Aragon Research Globe for Enterprise Coaching, 2024

Putting Conversational Intelligence to Work

**Author:** Jim Lundy

**Video Producer:** Adam Pease

**Topic:** Coaching

**Issue:** Who are the vendors making a difference in providing coaching applications?

October 10, 2023 | Research Note 2023-38



## SUMMARY

The enterprise coaching market has quietly emerged as the need to automate the process of live and post interaction coaching is now apparent. Enterprise Coaching the most popular in Sales and Contact Centers but it is not limited to those roles. In our first Enterprise Coaching Globe, we evaluate 15 providers.

### Key Finding:

**Prediction:** By YE 2024, 70% of the Enterprise Coaching providers will add Generative AI capabilities to their platforms (75% probability).

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## Key Takeaways

1. Coaching is needed for nearly all frontline worker positions.
2. Conversation Intelligence, a form of Content AI, can help understand areas and skills to focus on.
3. Sales Coaching and Contact Center Coaching are seeing increased demand.

## Introduction

Coaching is a frontline application and management best practice. In previous reports, Aragon had focused on coaching and learning for sales, but what we have seen change in the market is the overall surge in demand for coaching for many frontline worker positions, including sales and contact center.

Technology such as conversational intelligence is helping to empower this growth and demand for coaching. While human managers still need to coach, what we see is the rise of this form of automated coaching application, which is technology-based and is getting smarter all the time. This report evaluates 15 vendors who are making a difference in the coaching market.

Remote work has placed severe pressure on sales organizations and increased the need for sales coaching and learning. The market has grown, and consolidation has already begun.

Enterprise Coaching has evolved from both the Sales Enablement, the Contact Center, and the Corporate Learning market. It has evolved as an area that technology is enabling to speed up and automate. The Coaching market is seeing solid demand as awareness grows that this is an automation play, where technology increases the speed of live conversations and feedback about improving what is said on a call the next time.

Sales leaders and Contact Center Managers have less time than ever to coach, but Coaching frontline workers does not end there. All kinds of frontline workers need feedback on how they are doing, and while today, the market is focused on Conversational Intelligence (Video), Aragon feels that there will be many more ways to interact based on video interactions as well. Note: Some providers can analyze videos to help improve role plays and interactions.

## The Evolution of Enterprise Coaching

Since Aragon declared sales coaching and learning as a market, we have seen strong growth and more new providers. This is because many enterprises are reaping the benefits of these new platforms, and word is spreading about their value. For 2024, we have separated

Coaching from Sales Coaching and Learning partly because so many SCL providers merged with Sales Enablement providers.

At the same time, in contact centers, there has been a gradual awareness that automating quality assurance is a needed capability, and today, we now have more providers that offer Coaching for Contact Center agents.

While this market has been emerging slowly over the last two years, Enterprise Coaching is here. Conversational Intelligence (voice AI) helps to automate and identify what needs to be focused on; the need is clearly coaching. We expect providers to continue to emerge and the feature set of coaching to continue to grow.

### **Enterprise Coaching: Why Demand Is Growing**

The enterprise coaching market is starting to become more defined and more bifurcated. While there are two distinct use cases—Sales Reps and Contact Center Agents, there is also the need to guide managers on coaching that their teams need. This basically means that there is one set of needs that can be applied across multiple organizations in an enterprise.

Demand is growing because now the act of Coaching can be automated. Artificial Intelligence is one of the catalysts in this movement, and while it started and revolves around Conversational AI, Generative AI is also here and is going to help individuals to be able to get more detailed feedback about what they need to do. This is because applications will be able to talk back in response to prompts or questions. While providers such as Gong helped to pioneer Conversational AI, today, it has become a common set of capabilities across multiple providers.

### **The Growth of Coaching**

Conversational Intelligence helped to start the trend toward awareness. But the need was to both automate and speed up this critical task. Managers are responsible for coaching, but their time is limited, particularly with larger teams and with remote work.

### **Conversational Intelligence Enables Deal Coaching and Guided Selling**

The ability to listen to what is said provides the ability to provide feedback to sales reps on their skills, talk time, and how they sell. The shift to guided selling is here and is still in the early days. Some providers can adapt a methodology into their platform to deploy real guided selling. Others still focus on the feedback to help improve by giving them coaching tips.

We would note that some providers offer very basic suggestions in their platform, but we don't think that it is enough. An example of lightweight recommendations is from Salesforce, which tries to tell users what to do but, in many cases, misses the mark.

### **The New Coaching Tech Stack—Large Language Models Come Online**

Large Language Models (LLM) are part of what is called Generative AI, which represents a new way for humans to talk to applications. Whether it be prompts or full natural language, the way people talk to applications is becoming less focused on queries and more focused on the spoken language. For Enterprise Coaching, a few providers have added Generative AI capabilities, and more are expected to.

The Coaching application is configured so that humans can start asking questions in free form to the application. The LLM is the front end, but it still needs the Conversational Intelligence algorithm (also called Voice AI) to be able to listen to either a voice call or, in some cases, a video call.

See Figure 1 below for the emerging architecture for Coaching Applications. Realize that Generative AI is still in its infancy, and many providers will add Gen AI and LLMs to their architecture over the next year. Note also that Figure 1 shows that Coaching apps may be configured in conjunction with a Sales Enablement Platform, a Contact Center, and, of course, the Meeting or Communications application so it can listen to and transcribe the call.

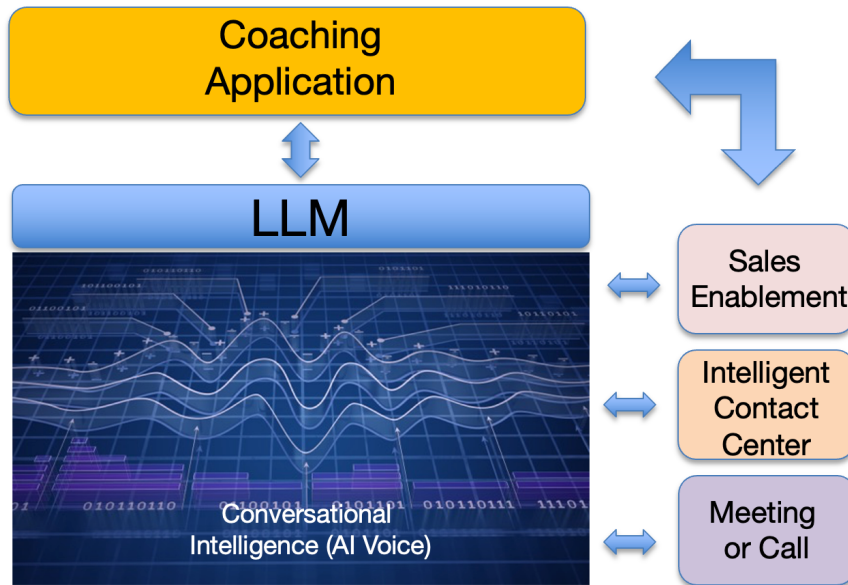


Figure 1: the emerging AI capabilities that help to make Coaching applications smart.

While nearly all of the focus today is on Conversational Intelligence, enterprises should realize that Generative AI-based applications can also be configured to read documents (document AI) and to look at video and images (computer vision).

**Prediction:** by YE 2024, 70% of the Enterprise Coaching providers will add Generative AI capabilities to their platform (75% probability).

### Coaching – Key Capabilities

Coaching is about skills (how), interaction conversations (what), and feedback (how to do better next time). For generations, Coaching was done by managers or trainers, often after the fact. Now, with Enterprise Coaching, the software can automate the process, and with Conversational Intelligence, it can often do Coaching in real-time and correct behaviors before they actually occur.

The key functionalities that enterprises should look for in an Enterprise Coaching application are listed below (see Figure 2).



Figure 2: Key elements of a sales coaching and learning platform.

### Preparation

- **Skills development**—this may include homework assignments and learning courses.
- **Practice Sessions**—that include role plays (voice or video role) to build skills and confidence.

### Interactions

- **Live Coaching** – what to say and when to say it. While this is emerging, expect to see more providers offering this.
- **Script adherence and Compliance** – this can be done live—and may have the application intervene and be reported post-call on how well the rep/agent delivered against the recommended script.

### Feedback

- **Call Review** – including talk time (both Sales and Contact Center Agents).
- **Manager Advice**—that includes which teams and individuals need on a regular basis.
- **Dashboards and Analytics**—providing the right analytics, particularly as it ties to rep/agent performance and business metrics.

## **Skill Coaching Is Here Today**

There are some important aspects to realize about the Enterprise Coaching market as it currently stands. Skill Coaching is the dominant feature set being provided today. Did you do what you were supposed to do? Did the worker follow the script? Did the worker have the right amount of talk time, did they know their products, were they friendly? These are things that can be assessed with Conversational Intelligence.

## **Deal or Transaction Coaching**

Deal Coaching for Sales or Transaction Coaching for Contact Centers is another layer of complexity that needs to be taught and mastered. In this scenario, the ability of providers to know what is being said and to know how to guide the Sales or Contact Center Agent is key.

In 2023, while many providers have added conversational intelligence to be able to analyze what is said during a sales call, there is still the need to add content AI to be able to analyze more about how content is created and consumed (see Figure 3 below).

In the future, Aragon envisions that Enterprise Coaching applications will be able to recognize what is happening and provide input and guidance to sales reps and managers about the right content to share, the fixed and dynamic sales playbooks, as well as guidance for reps and managers on what to do at each stage of a deal. While many providers offer basic guided selling, we see this area continuing to expand over time.

## **Onboarding Is Vital in a Front-Line Worker Remote Work Environment**

Hiring is a challenge, but onboarding is beyond essential in a post-pandemic selling environment. One of the biggest needs a sales team has is getting new sales associates onboarded quickly. A growing number of providers have made their onboarding modules stronger, which enables teams to get their reps productive and selling faster. Reducing the time it takes to train new team members on product information and the latest playbooks is one of the reasons that sales coaching and learning are taking off.

While onboarding classes can take place via video meetings, having the right sales coaching and learning platform is critical to ensure onboarding can be done virtually. Managers can get guidance from Coaching Platforms for skills work that their individual contributors need.



### Three Ways to Buy Enterprise Coaching

Enterprise Coaching is offered by the providers that focus on frontline workers. The Coaching demand today is from the Sales and Contact Center. So, while the need is for Coaching, in many cases, you can procure Coaching from a variety of providers:

- Sales Enablement Providers
- Standalone providers
- Intelligent Contact Center providers

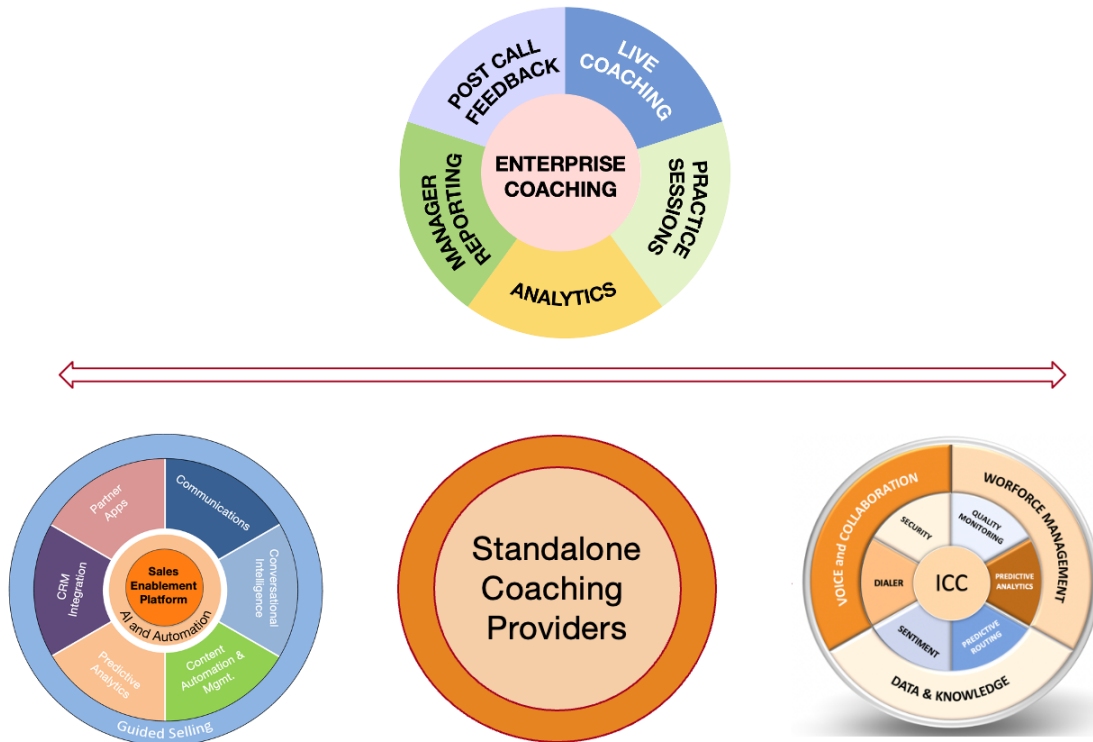


Figure 3: The different ways that Coaching Applications can be procured.

### The Aragon Research Globe™ for Coaching, 2024 (As of 10/10/2023)



Figure 4: The Aragon Research Globe™ for Enterprise Coaching, 2024.

## Leaders

### **Bigtincan**

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Bigtincan is based in Boston led by CEO David Keane. Bigtincan focuses on Sales Enablement and Coaching. While Bigtincan has grown via acquisition, it has also grown organically. Bigtincan now offers sales communications, sales content, coaching and learning, and conversational intelligence. It has three brands—Bigtincan, Brainshark and ClearSlide, each of which has solid install bases. In March 2023, Bigtincan introduced Bigtincan GenieAI™, its LLM powered personal assistant that can help with content generation as well as learning and coaching.

The Bigtincan Coaching application is powered by its VoiceVibes Conversational Intelligence acquisition, which also includes a Learning module. The Coaching solution helps with Sales onboarding including practice sessions, call review sessions, and active coaching. Some of the feedback that can be given to a rep includes tone-of-voice analysis such as enthusiasm, confidence and clarity. The new GenieAI capabilities will also help reps to get summaries of interactions.

For Managers, Bigtincan allows the creation of Coaching assignments based on the feedback the manager sees from Conversational Intelligence. Assignments include role plays that may involve specific scenarios. Because Bigtincan offers live meetings, it can record the interactions with customers and leverage Zoom, Cisco and Microsoft Teams.

The Bigtincan platform functions seamlessly on iOS, Android, and Windows devices online or offline. Bigtincan focuses on a number of vertical markets including life sciences, financial services, manufacturing, technology/telecom, and energy, as well as B2C retail providers including big box stores and large franchises.

#### Strengths

- Mobile sales and service
- Sales coaching and learning
- Analytics
- Salesforce and Outlook integration
- Mobile apps and full support for iOS, Google, and Windows
- Content analytics
- Conversational intelligence

#### Challenges

- Bringing together two large learning platforms and creating clearly defined use cases for customers

## Cresta

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Cresta, based in Palo Alto, California, and led by CEO Ping Wu, offers generative AI for the contact center that supports agents, managers and business leaders to thrive in their work. Cresta has four product offerings focused on the intelligent contact center (ICC), Cresta Agent Assist, Cresta Director, Cresta Insights, and Cresta Virtual Agent. The company has been adding new Generative AI capabilities over the years to bolster its offerings in Virtual Agent and Agent Assist and Post-Call Coaching.

Using information from its platform, Cresta's Virtual Agent solution identifies conversation types best suited for automation. With Cresta's Agent Assist solution, Cresta helps businesses identify and track behaviors that lead to successful outcomes and to coach and mentor agents in real-time.

Cresta Insights offers insights into what is being said and that helps to power Agent assist and Cresta Director. Capabilities include knowledge assist and real-time summarization and note-taking for all calls, which minimizes post-call activities for agents and removes ambiguity and bias in call reporting.

Because of its real-time listening engine, Coaching for agents can be delivered in real-time, not just post call. So, enterprises have the choice of doing post call processing and reviews. However, for certain agent populations, the need may be to have real-time coaching turned on in areas such as upsells or client retention. Cresta Opera allows managers to build and deploy real-time coaching rules such as new hints, knowledge articles, and guided workflows based on specific keywords, silence and behaviors.

Cresta's platform allows its Agent Assist to continue to learn and improve from successive positive outcomes across channels. One of the things that stands out is that Cresta focuses on both Agents and Managers via its offerings.

### Strengths

- Omni-channel
- Real-time coaching / agent-assist
- Automatic real-time call summary
- Automated note taking of calls
- Focus on Agents and Managers

### Challenges

- Awareness outside North America

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## Dialpad

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Dialpad based in San Ramon, California and led by co-founder and CEO Craig Walker, provides an AI-Powered Customer Intelligence Platform that combines Ai Contact Center, Ai Sales Center, Ai Messaging, Ai Meetings, and Ai Voice. It has been offering its solutions to sales, customer engagement and business communications buyers for several years, making investments in AI innovation one of its strategic initiatives. Its launch of DialpadGPT, in August 2023, is one of the first bespoke, domain-based Large Language Models (LLMs) specifically built business communications and collaboration and customizable for enterprise needs.

Dialpad Ai uses in-house and natively integrated LLMs with built-in speech recognition and natural language processing (NLP) to transcribe any conversation and deliver real-time, data-driven actionable insights and coaching recommendations. Dialpad Ai can automate and customize workflows for end users and agents (sales, HR recruiting, and contact center).

Some of the specific Dialpad Ai capabilities include:

- Dialpad Ai delivers real-time transcription capabilities that supervisors can read to assess agent needs and potential guidance during live calls.
- Ai Playbooks are a useful coaching and adherence tool for sales and HR teams.
- Ai Custom Moments provide supervisors with real-time alerts and customizable analytics based upon spoken keywords (i.e., competitor mention) to tailor coaching to common questions.
- Real-Time Assist Cards offer pre-programmed guidance, talk tracks, and assets for agents and sellers that populate based upon spoken keyword(s), ensuring agents have access to relevant information when supervisors are not available.
- Ai CSAT helps coaches understand which agents need more support and attention.
- Ai Agent Assist provides instant access to all knowledge sources in a chatbot-like interface to easily connect agents to the right information in real-time.

Ai Scorecards suggests when an agent or sales rep's mandatory behavior or process is met during a call. Ail Recaps, which provides users with a brief summary of every call or meeting. Dialpad focuses on delivering AI-powered Customer Intelligence solutions to SMB, Midmarket and Enterprise businesses. Dialpad is one of the providers that focuses on Coaching for Sales, Recruiting and Contact Center. This makes them one to watch in overall Enterprise Coaching.

### Strengths

- Natively integrated AI capabilities
- Real-time transcription on every call
- Real-time analytics
- Real-time custom moments and sentiment analysis
- Automated workflows
- Visual bot builder
- Pre-built integrations
- Sales and Recruiting use cases

### Challenges

- Maintain focus across a wide range of product offerings

## **Gong**

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Gong, based in San Francisco and led by CEO Amit Bendov, focuses on Revenue enablement, and a big part of that is their foundational Conversational AI capabilities. Gong currently offers the following products: Forecast, Engage, Gong Insights, and Gong AI. Gong is focused on delivering feedback and guidance to sales reps and their managers. Gong Engage was launched in June 2023, and it expands the Gong footprint in accounts.

Gong automatically transcribes calls so that it can deliver the insights and coaching actions needed. This includes the time that the topic was discussed and the talk ratio (rep vs. customer). Because of the visibility of team performance trends, Managers can see patterns and address coaching needs with reps who need it.

In August 2023, Gong introduced its Call Spotlight, its Gen AI-based offering that allows front-line workers to ask anything and get immediate answers. Call Spotlight provides highlights of key moments in a call, Outline, which categorizes call topics, and Call Briefs, which are summaries generated by Gong Spotlight.

While Gong has a history in Sales, Customer Success teams have also been adopting it. Marketing is another use case that Gong has been gaining traction with. That said, it helped to create the Conversational Intelligence use case for Sales.

### **Strengths**

- Salesforce native support
- Conversation Intelligence with real-time guided coaching
- Learning management
- Analytics
- Sales cadences
- Automated compliance

### **Challenges**

- Market awareness outside of North America

## **Gryphon.ai**

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Gryphon.ai, based in Boston, Massachusetts, and led by CEO Jeff Fotta, offers its Gryphon One platform that is ideal for customer-facing teams. It offers Gryph for Compliance, Gryph for Collections, Gryph for Conversation Intelligence, and Gryphon for Sentiment Analysis. One of the leadership capabilities is that Gryphon ONE can listen to conversations in real time.

Gryphon ONE offers call recording and conversation intelligence, real-time AI-based guided coaching, and comprehensive post-call analytics and sentiment analysis. Gryph for Conversation Intelligence enables real-time call capture and recording from any device at any time, making it a natural fit for enterprises whose sales teams depend highly on mobile enablement. Gryph acts as a coach/mentor, providing sales and customer service associates with advice during calls. Gryph can offer ongoing assistance with following up on leads, brand cues, and valuable intel about competitors.

Gryph for Compliance has become a popular use case as it helps to mitigate DNC, Telephone Consumer Protection Act (TCPA), Consumer Financial Protection Bureau and Fair Debt Collection Practices Act (FDCPA). It can automatically block non-compliant conversations.

Besides Collections, Gryphon offers a suite of analytics and sales engagement tools that include Onboarding and Sentiment Analysis, making it easy to seamlessly provide the right message to prospects at the right time. Given its use case focus and real-time Conversational Intelligence-based Coaching, Gryphon.ai is well positioned for the growing demand for Coaching.

### **Strengths**

- Salesforce native support
- Conversation Intelligence with real-time guided coaching
- Learning management
- Analytics
- Automated compliance

### **Challenges**

- Market awareness outside of North America

## **Qstream**

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Qstream, based in Boston and led by CEO Dan Whelan, continues to see demand for its just-in-time microlearning platform that also offers coaching as one of its key capabilities. While the focus has been on sales teams, they have also excelled in the life sciences market, with operational units such as nursing. Today, it is being adopted by enterprises in broader verticals and for horizontal use cases beyond sales training. Qstream helped to pioneer microlearning and its focus on just-in-time knowledge delivery.

Qstream offers a unique, proven approach that enables front-line workers to be able to recall information in job scenarios sooner than traditional methods. The capabilities that can be delivered via Qstream include scenario-based Q&A challenges, spaced repetition, real-time feedback, peer interaction, and game mechanics. So, due to the real-time nature of Qstream, the coaching feedback is immediate, and sales reps and managers can take action to make the right adjustments that matter.

Qstream offers robust analytics and has been able to show higher levels of engagement via its game mechanics, which makes microlearning fun, partially because it occurs in short bursts and can be delivered within the flow of work. Qstream has solidified its ability to extend beyond traditional LMS deployments. This is due to its ability to provide a first presentation of learning content, reinforce knowledge, create meaningful behavioral change, and provide managers with real-time data on an individual's learning needs for remediation and coaching. Qstream assists enterprises with strategic positioning and professional services that include content development best practices, instructional design services, and program launch services.

### **Strengths**

- Just-in-time knowledge delivery
- Analytics
- Mobile capabilities
- Life sciences install base

### **Challenges**

- Overall focus on video



## Seismic

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Seismic, led by Founder and CEO Doug Winter, has continued its strong growth and now touts an annual revenue run rate of over \$300M. Seismic offers its Enablement Cloud, which it announced in April 2022. The Seismic Enablement Cloud platform includes sales content management, sales coaching and learning, strategy and Planning, Content Automation, Buyer Engagement, and Enablement Intelligence.

The Seismic Platform also offers rich content experiences that include Smart Plays, dynamic email templates, and new global privacy management. Seismic also offers immersive, choose-your-own-adventure style presentations that allow the audience to drive the conversation.

Seismic's coaching capabilities include components from its Lessonly acquisition (now "Seismic Learning" product) combined with Seismic Skills, Knowledge, Practice, and Meetings modules. This set of capabilities provides JIT learning, role plays, targeted recommendations for role performance, and opportunity-specific recommendations. They also offer Skills coaching as well as targeted recommendations for role performance and opportunity recommendations. Finally, for managers, the platform provides specific recommendations for individuals who need targeted coaching. In October 2022, Seismic announced that it is partnering with Cisco and integrating Seismic with Cisco Webex Meetings.

Seismic continues to offer native content automation with its LiveDocs functionality that enables documents to be customized for prospects and clients on the fly. This eliminates the need for a separate CA or Configure Price Quote (CPQ) offering.

### **Strengths**

- Automated content assembly
- Install base
- Analytics
- Content management
- Content automation
- Content discoverability
- Customer success initiatives
- Pathing and certification
- Professional services
- Learning content creation

### **Challenges**

- Awareness in APAC

## Salesforce

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Salesforce, based in San Francisco and led by CEO Marc Benioff, helps businesses connect to their customers through Customer 360, a complete suite of products to unite sales, service, marketing, commerce, and IT with a single shared view of customer information. Salesforce offers Enablement as an add-on product to its CRM offering. Salesforce has also been leading the industry with its pioneering AI approach to Sales Cloud featuring Sales Cloud Einstein.

Enablement delivers outcome-based sales programs to sellers that drive continuous rep improvement natively within the CRM. Enablement provides step-by-step guidance, practice spaces, and resources that help sellers achieve specific revenue results. The key differentiator for Salesforce is the ability to embed revenue and behavioral milestones into sales programs. This functionality allows sales leaders to track if coaching programs are changing how reps work and tie that change to key business outcomes.

For 1:1 coaching, Salesforce offers Einstein Conversation Insights (ECI) as part of the Enablement add-on product. This solution provides conversation transcription, keyword tracking, mentions, and talk times, as well as AI-powered call summaries. These calls can be grouped into Call Collections, centralizing best practices to further improve rep performance. The keyword data analyzed in ECI can also be used to trigger automated sales program enrollment, adding sellers to programs based on their individual performance.

The same data can be leveraged by sales managers to have more informed 1:1 coaching conversations with their sellers that are focused on the specific behaviors that might be impeding quota achievement.

Both ECI and Enablement are embedded right within Sales Cloud natively, making it an attractive solution for Salesforce Sales Cloud customers.

Salesforce placed an early bet on AI, and now, with ECI and Enablement, it is going beyond pure CRM to offer a one-stop shop to sales teams that want coaching and learning with AI-based insights.

### **Strengths**

- Einstein Conversation Insights
- Tight integration with CRM
- Personalized content creation
- Gamification and leaderboards
- Customizable learning paths
- Salesforce in-app learning

### **Challenges**

- Pricing

## Contenders

### Allego

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Allego, based in Boston and led by CEO Yuchun Lee, offers its Go Platform. Go is a sales enablement platform that has content management, video-based sales coaching, onboarding, learning, and virtual selling capabilities. In 2022, Allego also added roleplay enhancements that include AI-generated virtual actors that simulate real-world sales interactions. To drive retention and reinforcement, Allego's Flash Drills delivers personalized questions to reps' smartphones based on their learning needs.

In addition, Allego offers sales content management and Digital Sales Rooms (DSRs) with a strong set of analytics that combine with conversation intelligence data for a fuller picture of deal interactions. Allego DSRs offer functionality, including personal video and live messaging, templates that can easily be customized, content engagement analytics, and a flexible security model that can open or restrict access based on email domain verification.

Allego also offers full conversation intelligence capabilities that enable reps to learn and get coaching feedback on their performance on calls. Allego Conversation Intelligence can transcribe calls across multiple languages, automate coaching alerts, and curate bite-sized call highlight reels to help managers quickly understand and improve sales behaviors and recommend content and next best actions. In 2023, Allego added GPT-powered (Generative AI) call summaries, translation, and role play.

Allego focuses on multiple markets, including financial services, life sciences, manufacturing, and high-tech. With Allego's expanded platform that includes Conversation Intelligence, Content Management, and expanded Coaching and Learning, they are one to watch.

#### Strengths

- Video learning
- Conversational Intelligence
- Mobile support
- Video creation
- Analytics

#### Challenges

- Market awareness outside of the U.S.

## **Mindtickle**

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Mindtickle, based in San Francisco and led by CEO Krishna Gopal Depura, focuses on overall Sales Enablement and Coaching and raised its second major \$100M funding round in August 2021. Mindtickle is privately held and has total funding of \$281M. The Mindtickle sales enablement platform features sales content management, sales coaching, and learning, which includes onboarding, training, microlearning, and role plays. In 2021, Mindtickle enhanced its platform with the announcement of Call AI, its conversational intelligence offering.

The Mindtickle Coaching offering can provide coaching on specific sales call attributes, including areas such as articulation, discovery, process adherence, competitor knowledge, and speaking in the customer persona. Managers can schedule 1:1 appointments to do some active coaching with individuals on the team. Reps can also learn from peers via the peer-to-peer coaching forum. Additionally, content that can be used to enhance skills can be automatically recommended.

In the area of coaching, Mindtickle continues to offer its coaching framework, which includes role-specific competency maps to enable personalization of learning paths and coaching. Mindtickle also enables teams to compete via leaderboards and other gamification techniques. Mindtickle offers advanced analytics so that sales leaders know which teams and individuals they need to focus on. Mindtickle integrates with sales enablement, HR, content management, and CRM platforms.

### **Strengths**

- Platform approach and single data model
- Competency-driven coaching framework for reps and managers
- Robust integrations to CRM, SE, LMS, and HR platforms
- AI-based analytics
- Smart role-plays with AI feedback
- Micro-learning with native content creation capabilities, social gamification, and spaced reinforcement

### **Challenges**

- Awareness outside of the U.S.

## Outreach

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Outreach, based in Seattle and led by CEO Manny Medina, offers its AI-powered sales execution platform that includes coaching as one of its core components. It has continued to focus on growth with some large deals. Outreach focuses on sales communications and offers Outreach Engage, Outreach Guide, and Outreach Commit, along with its intelligence capabilities.

Outreach Sequence leverages a series of touch points to help reps connect with buyers. Outreach Guide helps generate sales plans, offers AI-generated insights, and helps to track deal progress via deal health scores.

Outreach features Kaia Conversational Intelligence, which was launched in June 2022. Kaia CI can listen to calls on platforms such as Zoom and provide AI-generated insights to understand talk time. Kaia can also capture action items, notes, and content cards. Content Cards are moments during the call when key questions come up that are key to a deal.

In July 2023, Outreach announced the Outreach Marketplace for both Customers and Partners. The applications featured include ones for CRM Integration, Account Based Marketing, Marketing, Sales Intelligence, and more.

Outreach has also been expanding its European presence. In June 2022, Outreach announced new data center options in Dublin, Ireland, powered by Amazon Web services.

### Strengths

- Sales communications
- Digital assistant
- Conversational Intelligence
- Voice, email, and SMS capabilities
- Predictive analytics including intent
- Automation and sequencing of sales activities
- Sales coaching

### Challenges

- Content management capabilities

## Showpad

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Showpad, based in dual Chicago and Ghent HQs and led by CEO Hendrik Isebaert, continues to offer its sales enablement platform, Showpad eOS. It also offers its coaching and learning solution—Showpad Coach. The Showpad product portfolio has grown, and today it includes Showpad Content, Showpad Coach, Showpad MeetingIQ, and Showpad Video.

Showpad offers an intuitive Manager Hub to view all team activities. Showpad offers both the Coach Essential and Coach Plus offerings. Key capabilities include in-depth reporting and analytics, the ability to create training content, the ability for managers to identify gaps and weaknesses in the Manager Hub, and monitoring role progression. Coach Plus offers Pitch IQ—to understand how sales reps are doing on calls. Reps can practice pitches with the assistance of AI to pre-score their pitches and receive recommendations for improvements before they submit their pitch.

In related product areas, Showpad Shared Spaces, part of Showpad Content, allows buyers to visit a secure, branded micro-site to view all the content associated with that account. Showpad Content has built-in AI-based content recommendations so the right content can be shared at the right time.

Along with its strengths in content creation and the ability to update content for everyone, Showpad integrates with CRM systems such as Salesforce and Microsoft Dynamics, so sales professionals don't waste time looking for files or updating their CRM with the latest activities and can even share content from Showpad directly from their CRM.

### Strengths

- Mobile experience
- Content analytics
- Meeting analytics
- Content sharing
- Salesforce integration
- User interface

### Challenges

- Market awareness in U.S.

## Innovators

### AuctusIQ

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AuctusIQ, based in Lincoln, Nebraska, and led by CEO Troy Kanter, brings together a suite of services on a single tech platform that helps companies look at running a sales force as a business process. AuctusIQ offers a suite of Services focused on the Sales organization. This includes *TalentIQ*, *DeallQ*, *RecruitIQ*, *GrowthIQ*, and *CoachingIQ*. These are all focused on helping to enhance the performance of Sales teams.

CoachIQ analyzes specific sellers on an individual basis and provides mentors with guides for dialogue and cadence to drive employee growth. Additionally, the AuctusIQ deal intelligence system draws intelligence together to support a sales roadmap that helps accurately forecast deal success rates. GrowthIQ assigns a score to organizations based on its audit of their sales data. What makes this offering unique is the way it draws together different key intelligence and data touchpoints into a single, unified platform system.

In Macy 2023, AuctusIQ announced a partnership with Sandler, which will provide the Auctus Performance Platform to Sandler customers. This gives AuctusIQ significant distribution as Sandler is widely known by Sales organizations. With its focus on sales and deal coaching, AuctusIQ is well-positioned to help sales organizations succeed in a hybrid selling environment.

#### Strengths

- Deal coaching
- Analytics
- Rep coaching
- Unified approach
- Recruiting
- Operational sales assessments

#### Challenges

- Market awareness outside of North America

## **AmplifAI**

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AmplifAI, led by CEO Sean Minter and based in Plano, Texas, offers its AI-driven Performance Enablement platform. The Company raised \$18.5M in its Series A Round in 2021. AmplifAI enables enterprises to develop their employees and leaders. AmplifAI easily integrates all enterprise data sources such as CRM, voice analytics, surveys, ACD, chat, WFM, and HR systems to develop dynamic personas of high-performing associates and front-line coaches.

The high-performer personas then allow AmplifAI to create an automated learning and coaching blueprint for every employee that AmplifAI's algorithms use to generate its proprietary Coaching Effectiveness Index. AmplifAI transforms data and actions into user-friendly single-pane views that feature gamification, notifications, and other employee engagement features.

AmplifAI also learns about best practices. It encourages these via lesson plans, social recognition, and gamification. Managers understand who they need to focus on via coaching tasks.

### **Strengths**

- Salesforce native support
- Analytics
- Training sequences
- Advanced capabilities to support coaching efforts
- Gen AI performance recognition for users
- AI Driven coaching recommendations
- Integrations with 150+ platforms to centralize enterprise performance data

### **Challenges**

- Market awareness



## SalesHood

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SalesHood, based in San Francisco and led by CEO Elay Cohen and CTO Arthur Do, expanded its management team in 2022, adding Josh Cruckshank as CSO and Brett McBee-Wise as SVP of Product. SalesHood is a purpose-built sales enablement solution using AI to replicate top performers by achieving breakthroughs in sales effectiveness, execution, and readiness. SalesHood has strong capabilities in sales coaching and learning. The SalesHood platform offers branded document and video content delivery, just-in-time learning, prescriptive coaching, guided selling, and performance correlations. In addition to modern learning, SalesHood also offers digital Client Sites to allow enterprises to engage their customers and prospects at their own pace.

SalesHood released AI Coach in 2022, providing Customer-facing teams with real-time and AI-generated feedback on tone, duration, speed, key phrases mentioned, and restricted phrases avoided. AI Coach also offers summary recommendations that are presented in real-time with graphical and text-based qualitative and quantitative feedback. AI coach provides front-line managers with valuable messaging and sales process insights on their team's performance, guiding them to have data-driven coaching conversations.

SalesHood offers turn-key sales skills training and sales coaching templates in its library, including SalesHoodIQ, MEDDICC, Revenue Academy by Winning By Design, and Selling Through Curiosity. SalesHood focuses on front-line manager enablement with coaching templates and AI Coach to streamline remote and real-time sales coaching. SalesHood also offers guided selling in Salesforce and Microsoft.

Over the past 12 months, SalesHood enhanced its platform with new features that include major updates to its sales content solution, Integration marketplace, Salesforce CRM Insights, buyer engagement insights, AI Coach, custom generative AI prompts for coaching anything, and customized Pages. SalesHood is also leveraging an approach called Peer2Peer that focuses on best practice sharing among revenue teams. The focus is on use case storytelling, pitch practice, skills coaching, and team selling with Client Sites. Customers have seen success using this Peer2Peer approach.

### **Strengths**

- Sales content management
- Sales coaching and learning
- Digital client sites
- Social learning
- Front-line manager enablement
- Ease-of-use and administration
- Cash flow positive business

### **Challenges**

- Market awareness outside North America
- Larger heavily funded competitors

## **Aragon Advisory**

- Enterprises need to look at Coaching as a discipline that can now be augmented with technology. In an era of post-pandemic selling, sales organizations should deploy a dedicated sales coaching and learning platform to improve training and skills.
- Providers and offerings may differ based on the front-line workers they are targeting, but the need to enhance behaviors via coaching does not really differ across roles.
- Enterprises should evaluate the providers in this report and realize that some may meet different needs. Given existing install base, in some cases, a standalone Enterprise Coaching provider may be needed, particularly in the Intelligent Contact Center.

## **Bottom Line**

Enterprise Coaching represents the automation of an age-old process that often was based on a manager giving feedback to their individual team members. Now, that has changed, and there is the ability to coach all team members simultaneously as well as train sales representatives and sales managers. SCL platforms offer a robust and consistent way to deliver training that is vital to getting higher rates of achievement across the sales organization. Given the growing need for sales coaching, enterprises should realize that in, some cases, more than one SCL provider may be required (sales training vs coaching).

## Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance, but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

## Dimensions of Analysis

The following parameters are tracked in this analysis:

**Strategy** reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

**Performance** represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer experience:** Feedback on the product, installs, upgrades, and overall satisfaction.

- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?
- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

**Reach** is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international* or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East, and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.).

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

### The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators*, or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.

- **Specialists** fulfill their strategy well but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

### **Inclusion Criteria**

The inclusion criteria for this Aragon Research Globe is

- a minimum of \$4 million in primary revenue for customer experience (sales or Contact Center) or a minimum of \$8 million in revenue in a related market (sales coaching and learning).
- Shipping product. Product must be announced and available.
- Customer References. Vendor must produce customer references in each hemisphere that the vendor participates in.

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process. This determination was not applied to this report as all vendors participated in the Globe process.