



The Aragon Research Globe™ for Sales Coaching and Learning, 2021

Demand Soars as Readiness Becomes Vital in a Hybrid Sales Environment

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Issue: Who are the vendors battling to lead the sales coaching and learning revolution?

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SUMMARY

The sales coaching and learning market has taken off due to the demand for better onboarding and training of sales teams. In our second Globe report for this market, Aragon evaluates 18 major providers who are making a difference in sales coaching and learning.

Key Finding:

Prediction: By YE 2021, 55% of enterprises will eliminate their classroom-based sales training initiatives and shift to digital sales coaching and learning (70% probability).

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Key Takeaways

1. Sales learning is becoming part of sales enablement platforms.
2. Sales coaching is growing due to innovation by startups and demand from buyers.
3. Microlearning and video role-plays are critical elements to deploy to ensure skills and knowledge are updated on a daily or weekly basis.

Introduction

The pandemic has forced sales teams to work remotely, including nearly all customer meetings being done through audio and video conferencing. This 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. In this second Globe report, Aragon reviews the key trends in sales coaching and learning and provides in-depth analysis of 18 major providers.

The sales coaching and learning market continues to experience strong growth and, given the robust features that many providers offer, this market is proving to deliver the type of learning platform that everyone needs. In a period of post-pandemic remote work, the need for digital selling has never been greater. Given the demand from buyers—more sales enablement providers have entered this market.

Sales leaders have realized that they need more than the traditional LMS-based approach to onboard, train, and coach their sales teams to be the best they can be. The market has responded—and its response represents a diversion from the traditional corporate learning market.

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.

Aragon has declared that sales coaching and learning (SCL) should be considered a market unto itself, with a set of characteristics that make the process of training, practicing, and just-in-time learning a breeze. This trend has been developing for some time, but the ease of adding video capabilities into platforms has been one of the driving forces that has allowed providers to set themselves—and this new market—apart from traditional corporate learning.

The Current State of Sales Coaching and Learning

The sales coaching and learning market is starting to become more defined and more bifurcated. Sales learning/training is highly sought-after and there is a growing realization that sales coaching is needed.

Investment in the category has also increased, as illustrated by Mindtickle's \$200M rounds over the last year. At the same time, new providers are emerging that offer sales coaching in different forms.

Sales enablement vendors are starting to acquire sales learning vendors so they can offer an integrated portfolio. Recent examples include Bigtincan buying Brainshark and Seismic buying Lessonly.

Additionally, more providers are entering this market with coaching capabilities. New entrants include AuctusIQ and Gryphon.ai.

The Consolidation of Sales Learning Into Sales Enablement

2021 saw continued mergers and acquisitions as more sales enablement providers acquired best-of-breed SCL providers.

Since we identified the sales coaching and learning (SCL) market, a breakout market from the legacy corporate learning market in 2019, the market has seen strong growth. Over the last year, we have seen repeated moves by sales enablement providers to add their own native capabilities or to buy other providers. Examples include:

- Allego added its own sales enablement capabilities
- Bigtincan acquired Brainshark
- Highspot added its own capabilities
- Mindtickle added its own sales content management capabilities
- Showpad acquired LearnCore
- Seismic acquired Lessonly
- Vablet added its own learning capabilities.

As we have mentioned in the past, the common ground between sales enablement and sales coaching and learning is content. While market consolidation in markets such as sales

enablement is not uncommon, we still think there will continue to be a number of best-of-breed sales enablement providers as well as sales coaching and learning providers (see Figure 1).

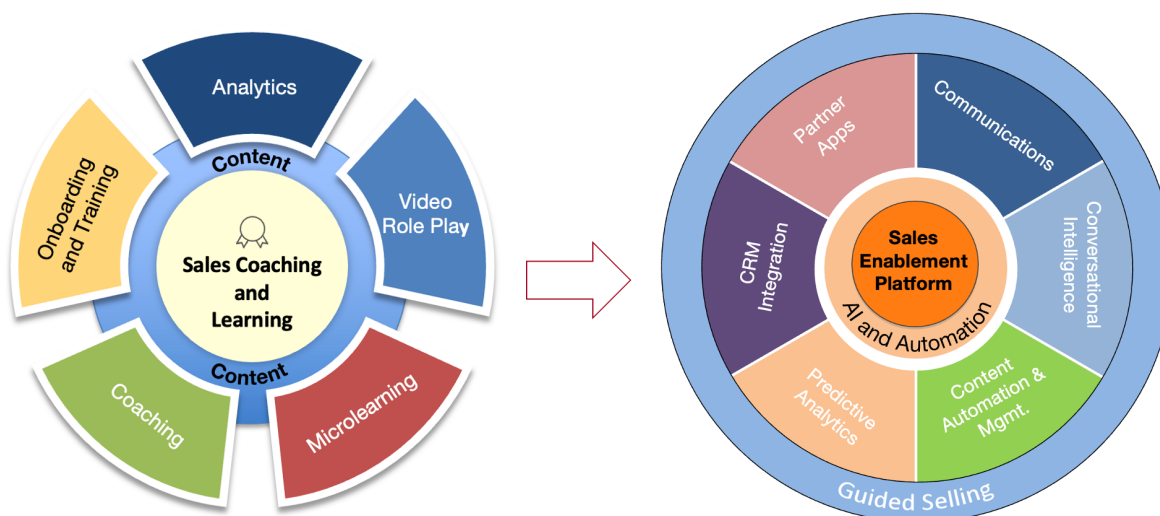


Figure 1: Sales learning is quickly becoming a part of overall sales enablement offerings.

The Growth of Sales Coaching

This year we've seen a greater need for remote sales coaching both on skills and on deals. Two new providers that offer sales coaching include gryphon.ai and AuctusIQ. We expect to see continued investment in sales coaching to augment the regular learning exercises that SCL providers already offer.

That said, sales coaching is also sometimes referred to as guided selling, which ties to sales methodology. This area is one of the most sought-after capabilities that many buyers are not yet aware of. Sales coaching has become real, and enterprises should realize that a virtual agent may become "the coach" for the account executive – when the manager is not available (see related Aragon Research Notes on digital labor and conversational ai).

Sales Coaching and Learning—Practice Makes Perfect

There is no doubt that even in the hybrid work environment we are in, salespeople need to practice the craft of selling and interacting on a regular basis. One of the big things that SCL solves is the need to learn new presentations, pitches, and skills.

The regular interactions that SCL platforms provide make it ideal for inclusion in a sales enablement platform. This is also one of the reasons why sales learning has quickly become distinct and unique from regular corporate learning offerings.

Corporate Learning Is About Skills and Mastery

While many corporate learning providers are still adding content libraries to their platforms, in many cases, they still do not offer core functionalities like microlearning. For this reason, we see continued separation between sales learning and corporate learning providers.

The reality in many enterprises is that there will be a corporate learning platform that is managed by the HR team and a sales learning platform that is managed by sales. This should not be viewed as a negative because the reality is that business organizations are taking more control of their technology stack, and sales coaching and learning is clearly a part of the sales organization moving forward.

Remote Selling Is Here to Stay

Often referred to as digital sales, the reality is that many sellers today are working remote and are working with customers on a remote basis. This puts extreme pressure on sales managers that have young sales teams who need constant learning and coaching.

The work environment itself demands more investment in daily learning and coaching. Enterprises that do not have an SCL offering are often at a disadvantage because it forces sales managers to play the role of both coach, manager, and trainer—often all at the same time.

This is the reason that sales coaching and learning is a must-have part of the sales tech stack. While this is only the second Globe that Aragon has done on SCL, the demand for these technologies continues to grow, as does the number of providers.

The Shift to Virtual Classroom-Based Training

Part of the way that salespeople learn is by interacting with others in a class setting. In the past, Aragon estimates that up to 85% of all sales training was done in physical classrooms. Now, it is clear that physical classrooms are no longer the way to succeed. It is now all about using virtual classrooms to deliver a similar experience.

Today, many providers of sales coaching and learning partner with providers such as Cisco, Microsoft, Zoom, and Google to run their virtual classrooms on those platforms. One of the critical features for this kind of virtual classroom learning is called breakout rooms, which allow students to do exercises in small teams. Enterprises should assess their current virtual classroom capabilities to make sure they are optimized for learning.

Sales Training Becomes Vital in Remote Selling

There is a strong imperative for sales organizations to invest in robust sales training given that selling today is almost all conducted remotely, which puts more pressure on individuals to do selling over video conferencing. The best way to sell is still face-to-face, but that's just not a reality today.

In addition, it's not just about investment in sales training, it's about having good training content and regular role plays to ensure that the knowledge that a sales rep learns during a virtual class can be continually reinforced through practice. Part of the benefit of sales coaching and learning is having a platform that enables both onboarding and regular practice through microlearning content delivery.

Providers Get Serious About Sales Coaching

One of the biggest shifts over the last year is that more providers offer true sales coaching than in the past. It is important to point out that there are two types of sales coaching. One is deal coaching, where an application can coach a rep on the next thing to do in order to close a deal. To date, AuctusIQ, gryphon.ai, and Upland Altify are three providers that offer deal coaching, which has also been known as guided selling.

The other part of sales coaching involves making suggestions to the rep or to the manager on skills improvements that the rep needs to make. One of the new providers this year that has made a splash is Gryphon AI. Part of the reason that sales coaching can be enabled is the use of conversational intelligence.

Conversational Intelligence Is a Catalyst for Sales Coaching

The newest technology that's becoming part of the sales enablement stack overall is conversational intelligence. By being able to listen to a call that's in progress, providers can now offer real-time skill and deal coaching while the call is taking place. While this is sometimes referred to as agent assist in contact centers, conversational intelligence is the catalyst for enabling real-time sales coaching. Allego, Bigtincan, grypon.ai, and Mindtickle have all added conversational intelligence over the last year.

Sales Coaching and Learning—Key Capabilities

For years, sales training was done when someone was hired via the onboarding process, or in the classroom through what is called a ride along. The need to constantly train and practice has led to the rise of this new market.

Aragon is not saying that the corporate learning market is going away. On the contrary, it too is shifting. That said, there is too much pressure on sales teams to perform at a high level. Sales coaching and learning offerings are more tailored to the daily demands of sales teams, and that is why the demand for these offerings is skyrocketing.

The key functionality that enterprises should look for in an SCL platform includes (see Figure 2 below):

- Onboarding
- Video role-plays (can also include audio)
- Just-in-time microlearning
- Ongoing skills development
- Ability to manage content and courses
- Coaching—both skills and deals
- Analytics



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

Onboarding Becomes More Important in Post-Pandemic Selling Reality

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 is 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. To meet these needs, a complete approach to learning is a requirement; simply having an LMS in place is no longer sufficient. This trend is pushing the demand for and the growth of the sales coaching and learning market.

Video Role-Plays: Vital in a Hybrid Sales Environment

Over the last year, more providers have incorporated video role-plays into their offerings. Salespeople need to practice their delivery, and today, there is no better way to do that than with video-based role-plays. In an era of remote, digital selling, video role-plays are becoming more critical than ever.

Given the global nature of work, video learning is a way to accomplish the same results as being there in person with an expert. The reason enterprises need video learning now is due

to the unprecedented speed of business; workforces are no longer staying in place like they used to.

This turnover puts high stress on the enterprise, which itself is under siege from more nimble competitors. To keep up and to move faster, video learning solves some of the biggest issues an enterprise—especially an enterprise sales team—faces.

The Four Aspects of Sales Coaching and Learning that Lead to success

The best salespeople make SCL a daily habit. Figure 3 shows the continuum of SCL. Many organizations conduct sales onboarding and periodic sales training. But the best managers do regular coaching, which is now becoming more automated and guided. Organizations need to do all four elements of sales coaching and learning: onboarding, periodic training and classes, daily roleplays and microlearning, and regular manager coaching—and it must be synchronized. This is why an SCL platform will prove to be so valuable to a sales organization (see Figure 3).



Figure 3: The four critical aspects of sales coaching and learning.

The Aragon Research Globe™ for Sales Coaching and Learning, 2021 (As of 10/21/2021)

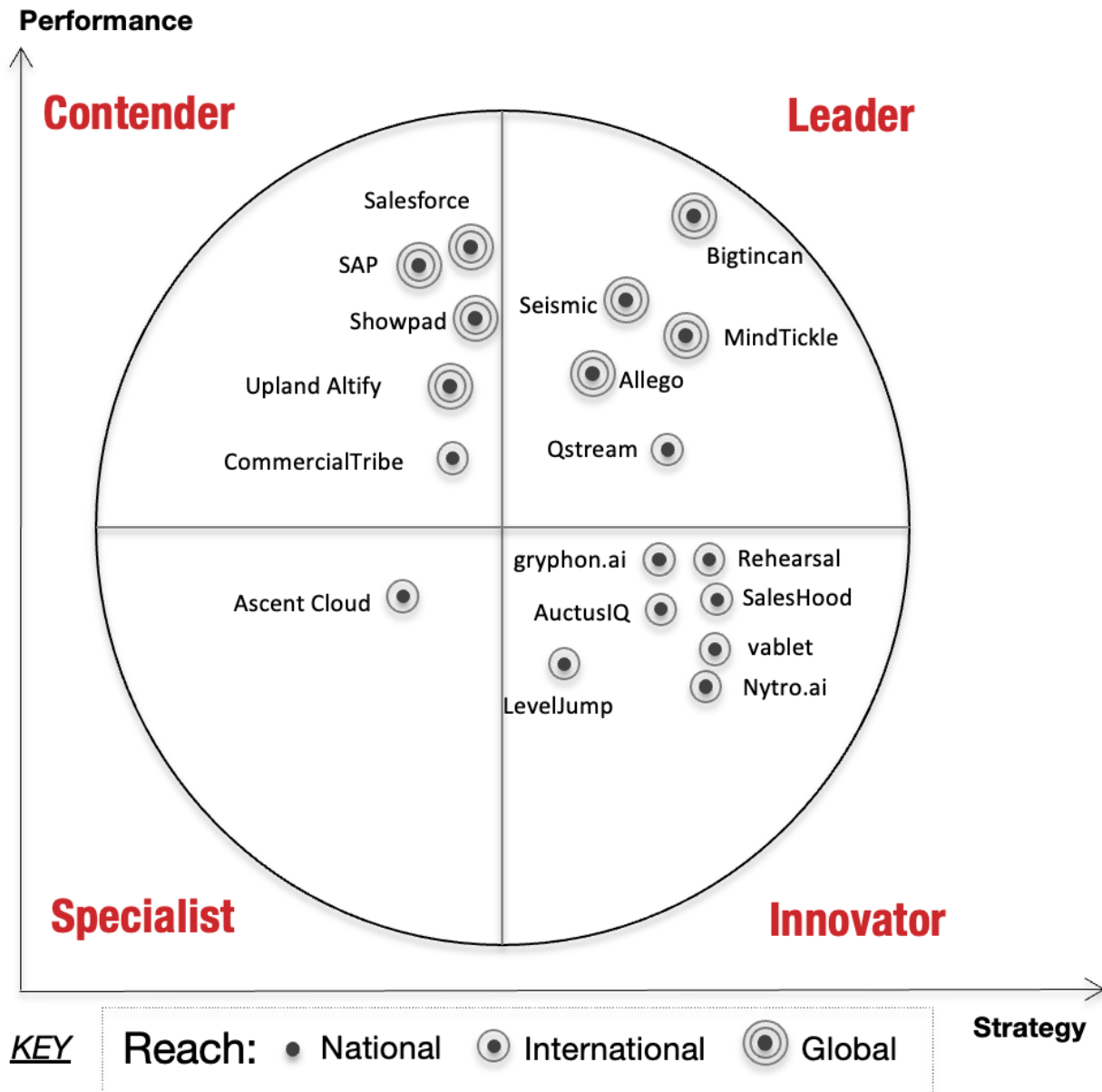


Figure 4: The Aragon Research Globe™ for Sales Coaching and Learning, 2021

Leaders

Allego

Allego, based in Boston, helped to pioneer video-based learning for sales. In 2021, Allego expanded its platform to include sales content management. It offers its sales coaching and learning platform in a bundle with its video solution. Allego offers onboarding, coaching, and video learning with a strong set of analytics. Allego flash drills are a microlearning technique that deliver daily questions to reps' smartphones on the basis of individual competency attainment and needs.

In May 2021, Allego expanded its call coaching capabilities to offer full conversational intelligence, which can now transcribe calls across multiple languages and automate alerts and coaching to improve overall sales behaviors. Allego focuses on multiple markets, including banking, insurance, wealth management, life sciences, and high tech. The ability to access videos online and offline on mobile devices also makes Allego a solid option for sales organizations.

Strengths

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

Challenges

- Market awareness outside of the U.S.

Bigtincan

Bigtincan acquired Brainshark in August 2021 for an undisclosed sum. With Brainshark, Bigtincan has one of the largest customer install bases in the SCL market. Bigtincan now has a full sales enablement platform and now even more capabilities in sales coaching and learning. Bigtincan offers a full sales coaching and learning offering based on its previous Zunos acquisition. Bigtincan Learning includes microlearning, in-app messages, video coaching, role-plays, and access to content offline. Additionally, enterprises can create their own courses with an intuitive course builder. One of the important additions to the Bigtincan platform is its embedded video coaching with machine learning behavioral scoring, which can be used for daily role-plays. The Bigtincan conversational intelligence solution allows reps to practice and receive subjective, AI-driven feedback on-demand, whether in call centers or face-to-face. The solution is also used to assess digital customer interactions for deal coaching.

With the acquisition of Brainshark, Bigtincan also offers Readiness Scorecards. This advanced form of analytics will help sales managers and leadership understand what areas of sales skills and techniques need focus, at both the individual, rep, and team levels.

Bigtincan Learning is sold with its flagship sales enablement offering and also offered standalone.

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

Mindtickle

Mindtickle raised its second major \$100M funding round in August 2021. Following its previous \$100M round in 2020, this puts its total funding at \$281M. The core focus of Mindtickle is on 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. 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.

In September 2021, Mindtickle expanded its platform with the addition of sales content management, which it calls Asset Hub. Asset Hub consolidates training content with customer-facing content. Additionally, Mindtickle also released the ability to create an Ideal Rep Profile to set the benchmarks for ideal rep behaviors and revenue performance and then track gaps against those benchmarks. 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.

Qstream

Qstream, based in Boston, has seen growth due to its focus on a just-in-time microlearning platform that has excelled in the life sciences market, particularly with sales teams. 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. Through this proven approach, learners are 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.

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 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, 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

Seismic has continued to grow organically, and given its revenue and global footprint, it is well-positioned for an IPO in the next twelve months. On August 16th, 2021, Seismic announced the acquisition of learning provider Lessonly, which, as an existing partner, was already deeply integrated with the Seismic platform. Lessonly by Seismic now offers core learning and skills training, practice/role plays, and a new knowledge module.

The Seismic platform offers rich content experiences that help sales teams connect with buyers and now with Lessonly by Seismic, Seismic offers both foundational and just-in-time learning experiences to all customer-facing roles. New features in 2021 include Smart Plays, dynamic email templates, and new global privacy management. Additional new capabilities include refined content recommendations from Seismic Aura, expanded knowledge management features from Obie, and coaching at scale through Lessonly skills.

Seismic is fully integrated into Salesforce and also works seamlessly with Slack, Zendesk, Gong, Zoom, email clients and many other adjacent technologies in the sales, learning and customer support tech stack. Seismic offers a robust set of learning capabilities to help enablers create and then leverage their learning artifacts for both formal learning paths as well as deconstructed and aligned to customer interactions to reinforce knowledge and behavior at the time of need. With Lessonly, Seismic is well positioned to offer sales enablement and sales coaching and learning offerings to sales, marketing and customer organizations.

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

Contenders

CommercialTribe

CommercialTribe offers a coaching platform that focuses on the sales manager and their ability to engage with and coach their teams. CommercialTribe's CT Connect provides a guided manager experience that helps to tell managers where to spend their time, with which sellers, and most importantly how they spend that time. Across the quarter, managers can execute a coaching cadence, taking ownership of their teams' development and ultimate success in making plans. Sales organizations can create assessment maps through sales management interactions that enable consistent, structured feedback. Managers can build coaching plans to determine with whom and where they should spend coaching time to improve performance.

One nice aspect of CommercialTribe is its use of dashboards that can observe the activities of individuals and compare them with others with similar tenure. CommercialTribe integrates with Salesforce for CRM and Google and Microsoft for calendar integration.

Strengths

- Built for sales manager persona
- Assessment maps
- Coaching plans
- Web/mobile app
- Analytics

Challenges

- Balancing coaching vs. learning

SAP

SAP offers SAP Litmos Training, which has expanded beyond its roots of sales coaching and learning. Today, besides sales, SAP Litmos focuses on service/support, operations, compliance, customer, partner, and employee training. SAP Litmos Training includes an online course builder, gamification, task automation, video role-plays/assessments, and customized learning paths. Additionally, the LMS provides the ability to add off-the-shelf content from the SAP Litmos Training Content library, which offers more than 1000 courses across relevant, timely topics.

SAP Litmos Training offers a full iOS and Android mobile experience that can be branded. The focus of SAP is on the entire sales enablement needs of a sales organization. SAP Litmos solutions are more focused on the horizontal needs of the extended enterprise, which includes partner and channel solutions. Besides the sales use case, SAP Litmos solutions also focus on operations, gig worker, contractor, customer, and supplier training.

Strengths

- Mobile support
- Video role-plays
- Other sales enablement modules
- Partner and channel training
- Off-the-shelf learning content
- Content authoring tool within the LMS

Challenges

- Awareness inside the SAP install base

Salesforce

Salesforce continues to promote Trailhead as its overall approach to skills development. It launched myTrailhead with great fanfare two years ago. myTrailhead is the paid offering, powered by Trailhead, which adds premium features for delivering custom branded enablement content, and it is ideal for sales and service team-enablement. myTrailhead features the ability to surface learning right in the flow of work within Salesforce, enabling greater adoption of Salesforce, and increased rep productivity. Gamification, with points and badges, leveraging built-in leader dashboards, is a proven feature set that is popular with sales teams. Additionally, its Einstein Conversation Insights gives sales managers insights about their teams' sales calls and surfaces coachable moments.

Salesforce touts the ability to create and update custom content creation quickly, and easily link out externally, enabling enterprises to speed up onboarding and scale delivery. Coming in the new Winter 22 release is the ability to segment content to specific audiences using content permissions.

For Salesforce Sales Cloud customers, one of the attractive features is the fact myTrailhead is embedded right within Sales Cloud natively with a new feature called learning paths. Learning paths makes Salesforce in-app learning possible, and there is literally no integration. Besides internal sales enablement, myTrailhead is also optimized for partner and customer onboarding, which is a growing need for enterprises that use partners for distribution.

Strengths

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

Challenges

- Pricing

Showpad

Showpad, with an established presence in the U.S. and Europe, continues to offer its sales enablement platform, along with its coaching and learning solution—Showpad Coach. In March 2021, Showpad announced a number of new executives that joined the company in sales, marketing, and HR leadership positions. Showpad is innovating with its Conversational Intelligence offering that allows reps and managers to gain insights on conversations during calls.

Showpad Content also includes Showpad Shared Spaces, which allows for buyers to visit a secure, branded micro-site for viewing 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.

The Spring 2021 releases added the ability to create custom home pages, accelerated course creation, enabled shareable video meeting ‘snippets,’ added greater augmented reality and VR support, and added enhancements to customize search options. Showpad is also optimized for web or mobile device access and historically has offered a strong mobile-first experience for salespeople on the go. 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.

Upland Altify

Upland Altify is focused on all aspects of sales and manager coaching via its customer revenue optimization platform. Upland Altify assists enterprises to increase revenue growth through repeatable, guided selling and regular coaching. Altify's customer revenue optimization platform offers several modules: Relationship Map, Account Manager, Sales Process Manager, Opportunity Manager, and Sales Reference Manager.

Upland Altify also includes advanced Altify Account Planning with Tableau and Salesforce Einstein integration, Qvidian Proposal Management, and Kapost Content Operations. Kapost Content simplifies the process of finding relevant content and courses. Altify's integration into Salesforce CRM means that coaching is always on and available. The Upland Altify intuitive interface guides sales reps to take the next best step in an account.

Strengths

- Guided selling
- Call coaching
- Opportunity management
- Account planning
- Advanced analytics

Challenges

- Market awareness outside of the U.S.

Innovators

AuctusIQ

AuctusIQ, based in Lincoln, Nebraska and led by CEO Troy Kanter and Chief Science and Strategy Officer, Courtney McCashland, 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 assess a person's set of talents and competencies (**TalentIQ**) to build out a roadmap for individual development it calls **CoachingIQ**. The AuctusIQ offering also combines intelligence about talent, coaching, operational competencies (**GrowthIQ**), recruiting (**RecruitIQ**) and deal confidence (**DealIQ**) to produce an integrated set of data-driven insights designed to spur growth.

Its coaching offering 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.

The AuctusIQ coaching support ties directly into its talent management capabilities, which helps enterprises construct metrics to retain and attract talent and engage in audits to find talent gaps. 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

Gryphon.ai

Gryphon.ai, based in Boston, Massachusetts, and led by CEO Jeff Fotta, offers a sales enablement and engagement platform with an emphasis on sales learning and coaching. The centerpiece of the Gryphon.ai platform is Gryphon One. It offers multi-channel cadences, call recording and conversation intelligence, real-time AI based guided coaching and Amplify Learning Management. Alongside these voice features, Gryphon offers a suite of analytics and sales engagement tools. Its multi-channel sales cadences make it easy to seamlessly message prospects at the right time. It also features a learning management system with sales training materials, a sales performance dashboard, and automated tools to maintain compliance with DNC and TCPA regulations.

Gryphon.ai 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. It also features a virtual assistant called Gryph, which acts as a coach/mentor providing sales associates with advice during calls. Gryph can offer ongoing assistance about following up on leads, brand cues, and valuable intel about competitors. While new to the sales market, Gryphon.ai is well positioned to meet the needs of growing sales organizations.

Strengths

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

Challenges

- Market awareness in sales

LevelJump

LevelJump offers a sales coaching and learning platform that focuses on onboarding, coaching, readiness, and enablement. On October 1st, 2021, Salesforce completed the acquisition of LevelJump for an undisclosed price. Salesforce previously had announced a fund to invest in and acquire Canadian technology companies. LevelJump can deliver prescriptive training sequences that are easy to build and deploy. Part of the justification for acquiring LevelJump is that it runs natively in Salesforce Sales Cloud—it should help to bolster the Salesforce myTrailhead offering.

LevelJump offers coaching rooms, which give a team a dedicated space for coaching. LevelJump partners with Gong.io to add conversational intelligence to the combined offering. LevelJump provides a robust set of analytics that need Salesforce to be leveraged. One of the key analytics attributes we like is the ability to visualize training results that are driving business outcomes.

Strengths

- Salesforce native support
- Analytics
- Training sequences
- Coaching rooms

Challenges

- Market awareness

Nytro.ai

Nytro.ai is an AI-powered platform for sales coaching, onboarding, training, and ongoing readiness. In June 2021, Nytro.ai announced Mike Stone as its CEO. Nytro's Pitch Intelligence platform uses AI to analyze pitch submissions across a number of useful dimensions, including clarity of speech, duration of speech, coverage of topics, identified keywords, and more to determine which reps are ready to sell digitally and which require more targeted training and coaching. Nytro.ai's intelligent system also compares the overall performance to that of a top-performing rep and provides actionable steps to improve pitch performance for those that need to become peak sales performers

Nytro.ai seamlessly integrates with all learning management systems and adds a layer of experiential learning to elevate sales rep onboarding, training and assessment programs.

Strengths

- Content creation
- Video coaching and role-play
- Sales enablement features
- Salesforce integration
- Content analytics

Challenges

- Market awareness

Rehearsal

Rehearsal helped to pioneer video-based sales coaching and learning. Rehearsal is an easy-to-use platform that focuses exclusively on video role-plays. Rehearsal also offers AI-based role-play feedback, which can speed up the learning process and reduce review time by managers.

In 2021, Rehearsal added adaptive learning to its platform. The Rehearsal adaptive learning module automatically adjusts a sales reps training based on their performance. Rehearsal Hot Seat helps to drive knowledge retention by having competition and only enabling a one-time answer.

The role-based analytics provide sales reps and their managers with insights about where they are in their training or onboarding, as well as what they need to focus on. By leveraging Amazon AWS, Rehearsal can deliver sales coaching and learning programs on a global basis.

Strengths

- Video role-play
- Collaboration
- Analytics
- Ease of use

Challenges

- Market awareness

SalesHood

SalesHood, based in San Francisco, continues to focus on executing its vision of an all-in-one sales enablement platform, purpose-built to drive revenue outcomes. The SalesHood platform enables revenue teams to boost sales productivity with just-in-time Training and Onboarding, Manager Coaching, Guided Selling and Buyer Sites. In addition to modern learning and coaching, SalesHood now enables the delivery of branded content, videos, and files to revenue teams, partners, and customers with Buyer Sites.

SalesHood enhanced its learning platform with live-event training and tracking, automated course enrollment, natural language process (NLP) smart search, AI/ML speech to text, public and private pitch modules, automated rules-based badge gamification and pitch AI. SalesHood also released Skillshood for company-wide enablement and updates to GDPR compliance for partner channels in PartnerHood. SalesHood offers localization for users across the globe, with AI/ML video transcription in 5 languages: English, Spanish, French, Chinese (simplified), and Japanese

SalesHood also released the Coaching Command Center to streamline remote sales coaching for front-line managers. SalesHood also announced an update to its partnership with Winning By Design with a new on-demand coaching membership service for virtual selling—Remote Selling Mastery. The content library is optimized for virtual coaching and selling.

In 2021, SalesHood released new performance analytics innovations with its Correlation Engine for Salesforce and no-code required integrations with leading business intelligence platforms like Domo, GoodData, PoweredBI, Snowflake, and Tableau.

Strengths

- Sales content management
- Sales coaching and learning
- Social learning
- Front-line manager enablement
- Performance analytics and correlation
- Ease of use
- Deep enablement domain expertise

Challenges

- Market awareness

vablet

vablet, based in Irvine, CA and led by CEO Paul Pacun, offers both a web- and mobile-first sales enablement platform. In 2021, vablet added sales coaching and learning to its portfolio. One of the features that stands out for vablet is its ability to access content on-the-go, including accessing it offline, which is important for the mobile sales professional. vablet can be deployed on iOS (iPhone or iPads), Android (Phones and Tablets), Windows devices—such as the Surface—and browsers. vablet excels at content sharing, particularly media including video, rich-media, and interactive presentations. vablet also includes strong forms capabilities, making it ideal for kiosk and other self-serve applications.

vablet provides advanced content management features including the ability to push new content to devices with full tracking capabilities and full offline access. Enterprises also like the native integrations with cloud content management providers, such as Box, Dropbox, Google Drive, Microsoft SharePoint, Hyland OnBase, SSO providers, and Oracle PLM.

vablet is winning customers in life sciences and has added financial services and medical devices as focus areas as well. vablet's form building tool also makes it ideal for data capture for reps on-the-go. vablet's extensive content capabilities, including rich media and video, along with offline access to that content, are one of the reasons it is winning new customers.

Strengths

- Content management
- Video support and expertise in handling video
- Document and video analytics
- Extensive Salesforce integration
- Optimized for mobile devices
- Sales coaching and learning
- Integrations

Challenges

- Market awareness

Specialists

Ascent Cloud

Ascent Cloud is the result of the merger between Geopointe and LevelEleven in January 2020. Geopointe is a geolocation solution for CRM that helps to enable field sales with geo-contextual intelligence. Geopointe is ideal for sales teams that need to do territory planning, optimize sales routes, visualize sales territories, and increase efficiency of time spent in the field. For sales and service use cases, Geopointe can help to maximize customer face time by having the best routes to minimize downtime.

LevelEleven is a sales performance solution that includes coaching, scorecards, gamification, and live TV broadcasts. LevelEleven leverages real-time analytics to allow managers to know who needs coaching and what to focus on via its Coaching Cadences. Scorecards for sales reps, managers, and sales leadership have an overview of individual and team performance as well as when to course correct.

Ascent Cloud has customers in a variety of several industries, including financial services, healthcare, manufacturing, and telecommunications. Ascent Cloud also offers native integrations between its LevelEleven and Geopointe solutions.

Strengths

- Coaching
- Gamification
- Scorecards
- Engagement
- Location services (Geolocation)
- Territory planning
- Route optimization
- Analytics

Challenges

- Balancing two different product offerings

Aragon Advisory

- In an era of post-pandemic selling, sales organizations should deploy a dedicated sales coaching and learning platform to improve training and skills.
- Role-plays are a vital part of any SCL offering. Enterprises should evaluate the ease of use of the role-play features before making a vendor selection.
- Enterprises should evaluate the providers in this report and realize that some may meet different needs for inside vs. direct sales teams and coaching vs learning.

Bottom Line

Sales coaching and learning is the newest and most focused way to onboard and continuously 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 \$6 million in primary revenue for 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.

New vendors included in this report:

- **Gryphon.ai**
- **Seismic**
- **vablet**