

BOWERY CAPITAL PRESENTS:

The Startup Sales Stack

Report

Tracking the top software tools for Startup Sales Orgs



Michael Brown Ellen Terlizzi Gabe Hawkes Ethan Schnaper Anjali Barnabas

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WWW.BOWERYCAP.COM WWW.G2.COM

Introduction

WHO SHOULD READ THIS REPORT?

This report is meant to serve as a guiding framework for anyone evaluating sales solutions. Whether sales, marketing, customer success or management, if you are thinking of using or buying software to optimize customer acquisition or management processes, this report should be insightful. We also hope it will be relevant for any parties interested in learning more about the sales and marketing automation software landscapes, from investors to consultants to prospective employees.

WHY IS IT RELEVANT TO THE SALES COMMUNITY?

The <u>Bowery Capital</u> team thinks about the startup sales stack from three separate angles. First, sales software is core to our portfolio support platform: our <u>Acceleration Team</u> works closely with every one of our founders to build an optimal enterprise sales infrastructure from the ground up. Second, it factors heavily into our diligence process: sales tools are critical to keeping acquisition costs low and sales cycles short, and we always evaluate how a startup leverages them as they go to market. Third, the sales stack is an area of potential investment for Bowery Capital: we focus exclusively on enterprise software and sales automation has become a sub-sector in its own right over recent years. Our team has developed a unique view on the startup sales stack and we are continually exposed to new, innovative solutions. As a result, we thought it would be helpful to aggregate our team's learnings into a piece that other startup stakeholders can use to build up or strengthen their own sales stacks. In 2021, we released the fifth edition of the report: the <u>2021 Startup Sales Stack Report</u>. This edition illustrates the landscape today, with some additional emerging categories too. We're proud to once again partner with <u>G2</u> for the raw data behind the report.

WHAT IS NEW?

For this year's edition of our Sales Stack report, we discuss the shift in buyer needs and how Sales Enablement will a key indicator of success in 2023 with actionable insights to inspect if your current tech stack is optimized for performance and efficiency. Lastly, we present our perspective on the emerging SalesTech innovations that are going to reshape the way we leverage and interact with sales tools. We relied heavily on G2's data as their ecosystem continues to grow at rapid pace.

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Acknowle	dgements	and Thank `	You
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I. Sales Stack Takeaways

What you need to know for an educated and farsighted selection of your sales tools

Categories Taxonomy – Guiding Framework

For this year's report we investigated tens of categories and hundreds of tools, ultimately narrowing our focus on 15 categories that we believe have the highest relevance for the sales machine, based on the momentum gained, the founders' feedback, and our perception from the market. The following framework helps visualize these categories in the context of a traditional customer lifecycle.



Categories Taxonomy – Description

1. Email Template Builder	Offer users templates (built with a simple drag-and-drop HTML editor) for creating business emails intended for certain industries or designed with specific themes.
2. PROPOSAL	Automate the proposal and RFP process by generating documents from a repository in multiple file formats, share them through multiple channels, and track the relative impact.
3. Contract Management	Automate the creation, tracking, and monitoring of contracts, enabling multiple stakeholders to participate in the contracting process to ensure compliance with laws, regulations, and company rules.
4. E-Signature	Facilitate the encrypted distribution of legally sensitive documents for the collection of electronic signatures.
5. SALES COACHING	Offer capture, analysis, and feedback tools related to sales calls to help refine technique, establish best practices, and improve sales win rates.
6. CRM	Manage a company's interactions with both current and potential customers, enabling team members to access real- time information (contact information, communication history, customer history, etc.).
7. Sales Intelligence	Collect and organize internal and external data to improve the quality and quantity of sales leads and identify new opportunities to build the pipeline.
8. MARKETING AUTOMATION	Help marketers to capture leads, nurture them further down the sales funnel, and analyze lead behavior and campaign performance.
9. Sales Engagement	Streamline the sales process by combining sales and marketing efforts to create personalized and automated sales journeys across all potential touchpoints (email, calls, social media, SMS/text, video, live chat, etc.).
10. Email Tracking	Track emails and collect analytics (e.g., email open rates, clicks volume, number of attachment downloads) to identify optimal engagement points and improve effectiveness of outreach campaigns.
11. LIVE CHAT	Open an instant messaging channel between customer service representatives and website visitors, to provide support to users who have questions regarding products.
12. CPQ	Automate the lifecycle of the quoting and proposal process (configuration logic for the offering, standard and custom pricing, and quote tracking) to accelerate the sales process while improving quote accuracy and customer relations.
13. Partner Management	Improve communications with business partners (suppliers, distributors, resellers, etc.) by providing for them a portal to access documents, campaign materials, market development funds (MDF), opportunities, and deals.
14. Sales Performance Management	Manage and record sales performance on a team and individual basis through scorecards to determine success and proactively guide personnel to improve their sales capabilities.
15. SALES ANALYTICS	Build on top of CRM data to reveal sales insights (e.g., performance of salespeople, products, communications etc.) and forecast future performance.

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"CORE "

"ARISING





Jake Dunlap CEO, Skaled

2023 Trends: Sales Enablement

As the dynamics of B2B Sales change and the economic conditions fluctuate, organizations are recognizing that focusing only on enabling individual sellers does not drive pipeline growth. The importance of sales enablement innovation has risen so we asked the teams at Skaled Consulting and RevShoppe to share their thoughts for 2023.

Expect to see companies cut between 20-40% of their sales technology budgets due to lack of usage. Many organizations were fine to "keep trying" with tools when they purchased two years ago but now in year three, they are trimming what's not working.

- Sales operations teams are not experts at these tools and it's the real reason adoption is struggling. We will continue
 to see the rise of expert agencies and Sales Operations roles to help optimize performance of tools just like
 marketing has experts for their tech stack and performance manage their outbound spend.
- Companies are going to look for tools that can be used across teams vs one singular use case. Tools like Outreach
 will have to do a better job of showing how they can be used across sales and CS as well which there is a
 tremendous use cases for.

More organizations will shift their focus to this motion to grow revenue vs. net new outbound. Sales Teams are going to switch their mindset completely and make account growth priority one. This means SDR teams are hyper focused on forging new relationships in target accounts vs. net new prospecting each week. Technology will be critical to support these efforts.

• We are going to see smaller, leaner teams; A shift in mindset to a performance optimization strategy for outbound that happens weekly; Tools utilization at 80-90% of their capabilities vs. 20-30% we see today.

"Tomorrow will be won by the teams that find ways to do outbound profitability and with less headaches"

– Jake Dunlap

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Patricia McClaren CEO, RevShoppe

RevShoppe

2023 Trends: Sales Enablement, Cont..

Sales engagement enablement is driven by a simple truth: Most sales engagement platforms are underutilized and/or underperforming simply because sellers are not as proficient as they can be to carry out their responsibilities in a sales engagement platform.

- Investing in sales engagement technology without prioritizing the enablement needed to spur adoption and desired results is akin to negating your investment. In these uncertain times, we're seeing mass layoffs across enablement orgs; this is a mistake on behalf of companies missing the connection between sales engagement platform adoption and optimization, and why their teams might not be succeeding.
- The key is having two sides to sales engagement enablement: one ongoing program for platform proficiency and a second for application of workflow. Platform proficiency focuses on what sales engagement is and the functionality. Application of workflow focuses on how the platform is actually used in a seller's day at your organization based on your unique strategy, typically varying from role to role.

Frontline Managers are also often overlooked in the sales engagement enablement strategy. There is a direct correlation between the frontline manager involvement and accountability of their team's using a sales engagement platform and that team's performance. Managers who are logging in and integrating sales engagement data into their coaching are able to truly make an impact on how their team is successful with a sales engagement platform. If your managers aren't expected to understand or leverage sales engagement they will not hold their teams as accountable and you won't see the adoption that will ultimately lead to performance.

"Sales engagement enablement is lacking across the board, and the key to driving better results in a tough economy is to prioritize building stronger enablement programs, not eliminating them."

Leverage Your Sales Tech: Actionable steps

Below are some steps to take to measure the effectiveness of your sales technology and where you may have opportunity to better enable your sellers and managers.

Process: Most of the technology inefficiencies and lack of enablement go unnoticed by leadership. SDR's and AE's are your best resource for this type of knowledge. Do a shadow session to identify:

- Workflow inefficiencies and discrepancies between AE's and SDR's. Can you confirm that all SMB reps are following the same workflow as a MM or ENT rep? Or are there major discrepancies in adoption? And from there, is there a correlation between the adoption and success?
- What does an outbound workflow look like and what data can be used from the CRM to support account prioritization?
- Ask the team what process takes them the longest (i.e. account research, email copy, account prioritization) and document the current flow, ask for feedback on how this could become more efficient.
- What data is most critical and how does the team source what they need and from what systems?
- Analyze what tools are used most, what tools aren't used; which have features that could help teams be more organized, efficient, and integrated.

"Where there's smoke, there's fire" - RevShoppe ₈



Metrics Inspection: Ask your managers to walk you through a 1v1 metrics inspection. Gather information that helps surface where there is opportunity for training and enablement.

- How is technology supporting managers in their metrics inspection? How to they interpret data and identify coaching opportunities?
- Instead of focusing on vanity metrics like opens, clicks, and responses, focus on things like "how many meetings are we completing with qualified prospects?" and "How many of those meetings are turning into qualified pipeline/opportunities?
- How are reps and managers held accountable?

CRM: Ensuring you can report on each stage of the sales process is critical in understanding your organizations inefficiencies and identify performance problems. If your CRM is not organized to track the proper conversions, you will struggle in pinpointing where there is opportunity to better enable your sellers. If 45% of all leads are disqualified due to "not interested" or "not a technical fit" etc. you need to course correct your marketing and SDR efforts by evaluating the quality of your account distribution.

- MQL > Qualified opportunity; recycled lead; or disqualified (and why)
- SDR > Qualified opportunity; recycled; disqualified
- AE opportunity acceptance rates; days between touches; templates used for next steps and action plans

SKALED

Where in the funnel do we see drop off; elongated sales cycles; closed lost opportunities





SalesTech Innovations to Keep on the Radar

PERSONALIZATION AT SCALE

G2's Buyer Behavior Study outlines a shift in power in the sales process, leaning heavily towards buyers. Companies must begin to innovate their sales processes to adhere to buyer's needs earlier in the sales cycle to build trust, remove friction, and provide content that buyers find useful and informative. These types of tools are not simply just CPQ software or contract management tooling, imagine a fully branded customer portal based on the specific needs and use case of the prospects. A Digital Sales Room is meant to offer customization in the sales process with a prospect facing portal to collaborate, track deal progress and share content. Sales Teams will need to put more time in curating a sales process that is specific to the buyers needs and use cases. Personalization is not just an outbound effort.



ARTIFICIAL INTELLIGENCE

G2 lists 161 AI sales Assistant tools available in the market today. AI has the potential to impact sales by automating some of the more repetitive and time-consuming tasks that salespeople currently have to do, such as data entry and analysis. This is where we see tools like Dooly and Scratchpad become critical shortcuts for sellers to better inform their CRM and leadership teams.

These types of assistants primarily focus on lead qualification and follow-up, pipeline management, forecasting, meeting scheduling, and data entry. The category is expanding, AI is evolving to better improve personalization efforts and impactful prospecting without sacrificing guality. These technologies can save reps a significant amount of time on account prioritization, research, and copy writing.

When teams are hyper focused on budget conscious tool consolidation, efficiency, and capacity, how will these tools redefine what a must have tech stack looks like?











Top Tools Constellation 2022





II. Leading Company Profiles

Top tools in the Startup Sales Stack by functional category



Profile Methodology

- All raw data are collected from G2's review platform as of June 2021
- The top five products for each category have been identified on the basis of (i) customer satisfaction with end user-focused product attributes and (ii) market presence, accounting for company size, web presence, and relative growth in both dimensions. If a product fit multiple categories, it has been allocated to the one in which it scored best according to the aforementioned criteria
- Overall drivers of customer satisfaction (e.g., ease of use, ease of setup, and quality support) are based on a large pool of customer reviews compiled from G2's website
- Pricing model reports publicly available price point and pricing structure for each tool
- Reasons to buy or to pass reflect our analysis on why a tool may or may not be a good fit for prospective buyers, often taking into account the company size or desired functionality. Such evaluations draw from our knowledge and second-hand evaluations from known founders, G2, or other reputable sources found online. While our aim is to offer a balanced evaluation of a product's strengths and weaknesses, this is by no means exhaustive
- The breakdown of customers by size, multiple implementation indicators (e.g., degree of third-party support, average time to go live, average contract terms), and payback estimations are intended to further help leaders make educated product selections



ENGAGE

Email Template Builder

Tools that offer users templates (built with a simple drag-and-drop HTML editor) for creating business emails intended for certain industries or designed with specific themes.

ACTIVE CAMPAIGN	16
KLAVIYO	17
CONSTANT CONTACT	18
SENDINBLUE	19
SITECORE (MOOSEND)	20

Additional products included in the category are: Omnisend, MailerLite, GetResponse, and Zoho



Observations on Email Template Builder and Criteria for Inclusion

This software can typically communicate with email marketing software so users can manage email lists. Email template builder software can also integrate into marketing automation software to assist with email marketing campaigns.

To qualify for inclusion in the Email Template Builder category, a product must:

Allow users to create their own reusable email templates Come with premade, reusable email templates Allow users to adjust text and themes on the templates

Email Template Builder

ActiveCampaign

ActiveCampaign

Chicago, IL

501-1,000 employees

ActiveCampaign helps growing businesses meaningfully connect and engage with customers. Its SaaS platform enables businesses to create optimized customer experiences by automating many processes and communicating with their customers across channels with personalized, intelligence-driven messages. www.activecampaign.com | Twitter: @activecampaign



Anne Keizer Location Chicago, IL USA Local Time 8:45 AM CS > 🔍 Web Cha > Fields > 🕝 Facebool ino. IL USA #74403 Saved at 09:24AM Sea View Emails ations / High Value Purchase Unsel View Contacts Activ Add a new trice Q Search action Sending Options Send an emai 🗮 Web Chat 👻 🖺 Send a site me Send an SMS Send a notificati ontact CRM **Pricing Model**

Lite \$9 Plus \$49 Professional \$149 Enterprise \$200+

Reasons To Buy

Great option for small businesses Email marketing and automation made simple

Great automation

Reasons To Pass

Campaigns feels limited in design

The system can be slow especially with communication with external CRM

Customer by Size



Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

15.6

14.3

66%

Email Template Builder

Klaviyo

Klaviyo

Boston, MA

501-1,000 employees

Klaviyo is a marketing automation platform. Powered by data, built for ecommerce and web businesses.

www.klaviyo.com | Twitter: @klaviyo





SENT ON December 15 at 1:15 p.m.

Pricing Model

Free (0-500 monthly emails) \$45 per month (15k monthly emails) \$60+ per month (15k monthly emails + texts usage pricing)

Reasons To Buy

Interface is simple and easy to use Pre-made flows and templates. Intuitive and effective

Reasons To Pass

A 0%

Total Opens 570

Can feel overwhelming at first and may be hard to learn

Bounced 92 (0.02%

Der 10 2017 -- 8-20

Customer by Size



Implementation Method¹



Services Team Consultant

Average Time to Go Live (Months) 0.6

4.6

5.6

83%

Average Contract Term (Months)

Estimated Payback (Months)

Constant Contact

Endurance International Group

Burlington, MA

1,000-2,500 employees

Constant Contact helps small businesses, nonprofits, and individuals navigate the power and potential of the internet with a robust suite of web building, e-commerce, domain, logo making, and online marketing tools.

www.constantcontact.com | Twitter: @ConstantContact





Pricing Model

╡

Core: \$9.99 per month Plus: \$45 per month CRM Platform by Sharpspring: \$449 per month

Reasons To Buy

Easy to use your contacts to craft email marketing geared towards those contacts.

Drag and drop option makes it easy and fast to build an email campaign

Reasons To Pass

Pricing is slightly above average for small customers

Customer by Size



Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

¹ Complement to 100% includes those respondents that have not disclosed a breakdown 10.2

14.4

62%

Email Template Builder

Sendinblue

Sendinblue

Paris, France

501-1,000 employees

SENDINBLUE easily allows users to manage their marketing campaigns, transactional emails, and SMS messages all in one simple and powerful platform.

www.sendinblue.com | Twitter: @SendinBlue





Pricing Model

Free: \$0 per month Lite: \$25 per month Premium: \$69 per month

Reasons To Buy

Setup is easy and intuitive

Integration with Shopify store and additional apps is an asset

Support is high-level and it offers extensive resources for self-learning

Reasons To Pass

Cannot upload videos into campaign without a third-party plug-in

Trial period is shorter than that of comparable apps

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.7

99

11.6

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 60%

Email Template Builder

Moosend

SITECORE

San Francisco, CA

1,000-2,500 employees

Moosend is a fully featured email marketing platform which includes a responsive email campaign editor, marketing automations and many other competing features.

https://moosend.com | Twitter: @Sitecore





Reasons To Buy

Through partnerships with IBM and Message Systems, Mossend offers a stable infrastructure Competitive pricing for small and medium sized enterprises

Reasons To Pass

The process of working with the program is complicated and needs time to invest in learning or communicating with staff member

Customer by Size



Implementation Method¹



Services Team Consultant

Average Time to Go Live (Months) 1.2

9.2

9.5

57%

Average Contract Term (Months)

Estimated Payback (Months)



Convert

Proposal

Tools that automate the proposal and RFP process by generating documents from a repository in multiple file formats, share them through multiple channels, and track the relative impact.

PANDADOC	23
PROPOSIFY	24
DROPBOX (DOCSEND)	25
RFPIO	26
LOOPIO Inc.	27

Additional products included in the category are: GetAccept, DealHub, Qwilr, Relayto, Conga



Observations on Proposal and Criteria for Inclusion

Proposal tools are usually used to help sales or partnerships. Common integrations include CRM software, CPQ software, esignature software, and accounting software.

To qualify for inclusion in the Proposal category, a product must:

Provide a repository of documents and templates which can be used to quickly generate proposals

Integrate with solutions like CRM and CPQ to pull product and customer data

Offer functionality to quickly create and send proposals, allow edits and feedback during the proposal process, and track changes made

Include analytics to evaluate the efficiency of the proposal process

PandaDoc

PandaDoc

San Francisco, CA

500-1,000 employees

PandaDoc is an app that lets users build, track, and sign docs all in one place. It can help automate workflow, discover what sells with built-in analytics, and get legally binding signatures in minutes. www.pandadoc.com | Twitter: @pandadoc





Car

Pricing Model

Free eSign: free

month

records

Essentials: \$19 per user per

Offers a varied and dynamic

accessible without the internet

Provides flexible formatting and

high degree of customization

It is easy to perform audit

Reasons To Buy

workflow management,

LEADERBOARD Completer Revenue Time to clo Meg Rigden \$17,570,00 1.84 hours 107 docs 🔺 Senior Sales Manage Pafaada El Nour 86 docs 🔺 \$12,140.00 2.30 hour \$6.980.00 2.35 hours 42 docs -

> Business: \$49 per user per month Enterprise: contact them directly

Reasons To Pass

Cannot upload multiple

documents at once

significant time

Mobile adaptation is limited

File conversion might take

Go Live (Months)

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

Implementation Method¹

4%

ENTERPRISE

(>1000 EMP.)



23%

MID-MARKET

(51-1000 EMP.)

Customer by Size

72%

Small Business

(<50 EMP.)

Services Team Consultant

Average Time to

18

0.3

9.54

80%

Proposify

Proposify.biz

Halifax, Canada

51-200 employees

Proposify helps sales teams streamline the process of creating, sending, and closing proposals, quotes, contracts, and other sales documents. It provides a simple way of delivering beautiful, winning proposals to clients.

www.proposify.com | Twitter: @proposify





Business Plan: \$590 per business per month

Reasons To Pass

Drag and drop feature is limited Lacks search feature in the image library

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.2

10.9

5.5

79%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

24

Proposify Free: free

month

Team Plan: \$49 per user per

Reasons To Buy

Beautiful templates makes it easy to build, tailor, and tweak proposals quickly

Function to live chat with client as they go through proposal is a value added

DocSend

DocSend

San Francisco, CA

2,500-5,000 employees

DocSend tells salespeople how prospects engage with their sales material. Have the right conversation, at the right time, with the right person, and do business faster.

www.docsend.com| Twitter: @DocSend



Core Metrics				
75% Avg. viewed	1,862 _{Visits}	263 Downloads		
Comparat	ive Stats		Uareinn 1 Uareinn 7	
Time per page (average seconds p	per visit)	DocSend	🛃 Sign Document 9/9 🗱 3\$ + — C	হ 😨
100 80 60			Signature By signing below, I confirm that I have reviewed and agree to the contents of this document. Full Name Date	
20		<	5/20/2019 Email address	
			Signature i agree to use decorate resorts and signatures and to Doctands Terms of Service. Sign document	
Prici	ng M	odel		
Perso	onal: \$10	per month		

Reasons To Pass

file types

Can be difficult to upload certain

Standard: \$45 per month Advanced: \$150 per 3 users per month Enterprise: contact them directly

Reasons To Buy

Sharing documents and ease of use

Prospects love how clean and organized it looks

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.1

12

6

67%

Average Contract Term (Months)

Estimated Payback (Months)

RFPIO

RFPIO

Beaverton, OR

201-500 employees

RFPIO is a cloud-based RFP software that eliminates the friction often associated with responding to Requests for Proposal (RFPs), through a no-nonsense set-up, simple and intuitive user interface, and robust integrations with Salesforce and Slack.

www.rfpio.com | Twitter: @rfpioinc





Pricing Model

RFPIO has not provided pricing information for this product or service. Contact RFPIO to obtain current pricing

Reasons To Buy

Provides robust integrations with Salesforce and Slack Offers a large array of functions and customization to manage and respond to RFIs and RFPs

Reasons To Pass

Flexibility is limited due to heavy automation Sometimes it can be difficult to manually change documents

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.1

48

10.3

62%

Average Contract Term (Months)

Estimated Payback (Months)

Loopio

Loopio Inc.

Toronto, Canada

201-500 employees

Loopio's response software streamlines the way enterprises respond to RFPs, RFIs, and Security Questionnaires.

www.loopio.com | Twitter: @loopioinc



COOPO # Projects Reviews 🕥 Library Categories Tags	Admin	Search Library Q Help 🧕 Nat -	
🗐 Library		+ Create New 2 Import	
Search Library Q Al Stacks	re vergens	Al Sub-Categories	
O Exact Phrase Match: OFF OFF OFF OFF OSearch Fields: @ Question	(s) 2 Answer 2 Tags	Q, Search +	
1-10 of 58 results Previous 1 2 3 4 5 6 Next+		SORT BY Last Updated (Recent to Oldest)	
Are you a cloud solution?	Stacks	<u>`</u>	Q A
Loopio is a SaaS product that operates using cloud-based servers. The Loopio servers or platform from any location with an interset connection.			
Sales Content Se Technology / Architecture	Customer Support	- Categories	•6
An overview of Loopio			
Responding to RFPs can be a drasting task, especially when the information you need	is s	Resources	Q A
	1		

Pricing Model

Loopio has not provided pricing information for this product or service. Contact Loopio to obtain current pricing

Reasons To Buy

Collaboration tools make it easy to manage ongoing and multiple projects at the same time Home dashboard gives a comprehensive view of everything that is going on

Reasons To Pass

Search function still has room for improvement

Customer by Size



Implementation Method¹



Average Time to Go Live (Months)

97

1.3 49.0

10.4

71%

Average Contract Term (Months)

Estimated Payback (Months)



Convert

Contract Management

Tools that automate the creation, tracking, and monitoring of contracts, enabling multiple stakeholders to participate in the contracting process to ensure compliance with laws, regulations, and company rules.

PandaDoc	30
LinkSquares	31
Proposify	32
GetAccept.Al	33
DealHub.io	34

Additional products included in the category are: Ironclad, Accelo, Qwilr, Lexion, SpotDraft



Observations on Contract Management and Criteria for Inclusion

Contract management software typically fits into a portfolio of tools used to handle overall vendor or contractor relationships and commonly integrates into CRM software, proposal software, accounting software, and e-signature software.

To qualify for inclusion in the Contract Management category, a product must:

Include a repository of documents which can be stored in different categories for each type of contract

Offer templates which can be customized by the users involved in the creation of business contracts

Provide the ability to easily create, edit, share, and collaborate on contracts internally (with other employees) and externally (with customers or partners)

Enable users to send notifications for significant milestones, like contract expiry or renewal

Comply with business legal requirements as well as with the internal business rules of the parties involved in the contract

PandaDoc

PandaDoc

San Francisco, CA

501-1000 employees

PandaDoc is an app that lets users build, track, and sign docs all in one place. It can help automate workflow, discover what sells with built-in analytics, and get legally binding signatures in minutes. www.pandadoc.com | Twitter: @pandadoc





Car

Pricing Model

Free eSign: free

month

records

Essentials: \$19 per user per

Offers a varied and dynamic

accessible without the internet

Provides flexible formatting and

high degree of customization

It is easy to perform audit

Reasons To Buy

workflow management,

LEADERBOARD		ERBOARD	Completed		Time to close
	A	Meg Rigden Senior Sales Manager	107 docs 🔺	\$17,570.00	1.84 hours
No. of Concession, Name	2	Rafeeda El Nouri Sales Manager	86 docs 🔺	\$12,140.00	2.30 hours
		Andries Grootoonk Sales Manager	42 docs 🔻	\$6,980.00	2.35 hours
	Takana a			instantinen suon	DERESZOR

Business: \$49 per user per month Enterprise: Contact PandaDoc

Reasons To Pass

Mobile adaptation is limited Cannot upload multiple documents at once File conversion might take significant time

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.6

14

10.4

79%

Average Contract Term (Months)

Estimated Payback (Months)

CONTRACT MANAGEMENT

LinkSquares

LinkSqaures

Boston, MA

201-500 employees

LinkSquares is an AI-Powered contract analytics tool for in-house legal and finance teams. Drift, Carbonite, and Wish are saving hundreds of hours and thousands of dollars by eliminating manual contract review. www.linksquares.com | Twitter: @linksquares



Overview Schedule	Insights	Stream Attachmen	nts Materials	Expenses	Billing Assets	Details		
Status: All 👻 Milestone	e Manager/Task Ass	ignee: All 👻		0 Edit Plan	Add Task Q Sei	rch		
ilestones & Tasks	Status	Earned Value +		Usage / Budget Sch	eduled start + Scheduled due	 Actions 		
 Kickoff Vera Dushevina 	Complete	\$177/\$200	88%	4h 52m / 3h 15m	$\underline{Jul 20} \vdash \underline{Jul 24}$	Q & :		
Internal Handoffs/Doc Vera Dushevina	Complete	\$0 / \$0	0%	2h 44m / 1h 30m	Jul 20 > Jul 24	Q & :		
Meeting: Kickoff Call Astrid Kumbernuss	Complete	\$177 / \$200	88%	0h 53m / 1h 0m	$\underline{Jul24} \vdash \underline{Jul24}$	0.8 :		
Project Management David Beckham	Complete	\$0 / \$0	0%	1h 14m / 0h 45m	Jul 27 > Jul 30	Q & 1		
 Base Setup [User + CRM] David Beckham 	Pending	\$17 / \$2,150	0%	0h 13m / 13h 0m	Jul 27 > Sep 15	0.8 :		
Project Management David Beckham	Started	\$0 / \$0	0%	Oh Roy / SIN/JSm	Jul 27 - Aue 20	<u> </u>		
Meeting: Operations R David Beckham	Pending	\$0 / \$300	; by Ca	tegory				
Meetings: User + CRM David Beckham	Pending	\$0 / \$600	0%					
Offline Setup [User + C David Beckham	Started	\$17/\$500	3% reated On and	After Wed Jan 01 202 Cl	ient Created On and Before Thu Dec	31 202 Client Status (A)	L] Category (ALL)	Category Option (ALL)
Salesforce Import [CRM]	Pending	\$0/\$150	0% anies Create	d Over Time, by Category Op	tion			
Team Training Scoping David Beckham	Pending	\$0 / \$0	0%					
Training: Accelo Overvi David Beckham	Pending	\$0 / \$600	0%					
Project Setup David Beckham	Pending	\$217 / \$2,700	8%					
Retainer Setup David Beckham	Pending	\$0 / \$1,850	0%					

Pricing Model

Plus: \$24 per user Premium: \$39 per user

Reasons To Buy

User friendly and promotes productivity Real time task tracking Fantastic onboarding

Reasons To Pass

Customer service could be improved Integration could be more robust

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 29

54

24

54%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

GetAccept.AI

GetAccept.Al

Palo Altos, CA

51-200 employees

GetAccept is an all-in-one solution for e-signature, contract management, proposal creation, sales collateral management, document tracking and prospecting. Used by sales, HR, customer success and development teams; personal video messaging, live chat and analytics are popular features. www.getaccept.com| Twitter: @getaccept

Overall Satisfaction Ease of Use 92% 93% Ease of Setup Quality of Support 89% 97% VISIT G2 WEBSITE



Pricing Model

Essential: \$15 per user per month Pro: \$49 per user per month

Reasons To Buy

Ability to view updates in realtime helps maintain a timely communication with clients

Modern user interface makes it easy for both user and customer to navigate

Reasons To Pass

HubSpot integration is still not fully smooth

Mobile application does not replicate all the functionalities of the desktop version

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.7

20

12

68%

Average Contract Term (Months)

Estimated Payback (Months)

Proposify

Proposify.biz

Halifax, Canada

51-200 employees

Proposify helps sales teams streamline the process of creating, sending, and closing proposals, quotes, contracts, and other sales documents. It provides a simple way of delivering beautiful, winning proposals to clients.

www.proposify.com | Twitter: @proposify



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Pricing Model

Proposify Free: free Team Plan: \$49 per user per month

Reasons To Buy

Beautiful templates makes it easy to build, tailor, and tweak proposals quickly

Function to live chat with client as they go through proposal is a value added Business Plan: \$590 per business per month

Reasons To Pass

Drag and drop feature is limited Lacks search feature in the image library

Customer by Size



Implementation Method¹



Services Team Consultant

Average Time to Go Live (Months) 0.7 10.9

5.5

79%

Average Contract Term (Months)

Estimated Payback (Months)

CONTRACT MANAGEMENT

DealHub.IO

DealHub

Los Altos, CA

VISIT G2 WEBSITE

101-200 employees

DealHub is easy to set up and easy to use. Sales Engagement and CPQ platform lets you share relevant content, quickly produce error-free quotes, track buyer engagement and automate sales workflows and approvals. DealHub is fully native within Salesforce and Microsoft Dynamics CRM .www.dealhub.io | Twitter: @DealHubIO

Overall SatisfactionEase of Use90%92%Ease of SetupQuality of Support95%97%

Pricing Model

DealHub has not provided pricing information for this product or service. Contact DealHub to obtain current pricing

NDA Details 1 of 6

Type of NDA:

Effective date: (?

Selec the relevant company entity (Inc. or Ltd.):

Reasons To Buy

Very responsive and knowledgeable Flexible enough to support our start-ups quickly changing needs Excellent and intuitive quoting tool

Reasons To Pass

Required standardization around proposal documents

THE MINDCORF

Customer by Size



Implementation Method¹



SERVICES TEAM CONSULTANT

Average Time to Go Live (Months) 2.4

46

13

77%

Average Contract Term (Months)

Estimated Payback (Months)



Convert

E-Signature

Tools that facilitate the encrypted distribution of legally sensitive documents for the collection of electronic signatures.

DOCUSIGN	37
DROPXBOX SIGN	38
PANDADOC	39
airSlate	40
Foxit	41

Additional products included in the category are: Adobe, Eversign


Observations on E-Signature and Criteria for Inclusion

E-signature software frequently integrates into third-party applications, including CRM software, ERP systems, HR management suites, and accounting to facilitate quote, contract, and supplier management efforts.

To qualify for inclusion in the E-Signature category, a product must:

- Allow both sender and recipient users to sign documents on a variety of devices and operating systems
- Encrypt and secure communications and shared documents between the users of the solution
- Track document status and notify users when actions are required (sign, approve, etc.)
- Enable users to define user roles and permission rights both internally as well as for external users (contractors, partners, customers, etc.)
- Offer built-document creation and storage capabilities or integrate into third-party software solutions that provide document creation or storage features

E-Signature

DocuSign

DocuSign

San Francisco, CA

5,000+ employees

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 method for signing electronically on practically any device, from almost anywhere, at any time. <u>www.docusign.com</u> | Twitter: @DocuSign





Add Documents

Mutual NDA GerWatt.doc

Add Recipients

sage to All Recipient

Pricing Model

Individual: \$10 per month

(Signing Made Simple)

Standard: \$25 per month

Reasons To Buy

User interface is modern and

It is possible to create custom

templates and save them for

Mobile application works perfectly as the desktop

(Business Essentials)

simple

application

recurring use

Business: \$40 per month (Advanced Features)

Business Premium: \$135 per month per user (Power Plan)

Reasons To Pass

Cannot alter/modify documents after sending them (it is required to delete them and start over)

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.3

14.8

12.8

70%

Average Contract Term (Months)

Estimated Payback (Months)

E-Signature

Dropbox Sign

Dropbox (formerly HelloSign)

San Francisco, CA

2,500-5,000 employees

Fast, secure, and legally binding e-signatures for business.

www.hellosign.com | Twitter: @HelloSign



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Pricing Model

Favorite Templa

Essentials: \$15 per user per month, billed annually Dropbox + eSign: \$25 per month Standard: \$26 per month

Reasons To Buy

It is easy to use and user friendly Offers option to make reusable forms

It is possible to add multiple files onto one upload to send to a client for signature

Reasons To Pass

Lacks customizability options for branding

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.2

14

10.4

79%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

Complement to 100% includes those respondents that have not disclosed a breakdown

E-SIGNATURE

PandaDoc

PandaDoc

San Francisco, CA

500-1,000 employees

PandaDoc is an app that lets users build, track, and sign docs all in one place. It can help automate workflow, discover what sells with built-in analytics, and get legally binding signatures in minutes. www.pandadoc.com | Twitter: @pandadoc





Meg Rigden

Senior Sales Manage

Pafaada El Nour

Pricing Model

Car

Free eSign: free Essentials: \$19 per user per month

Reasons To Buy

Offers a varied and dynamic workflow management, accessible without the internet Provides flexible formatting and high degree of customization It is easy to perform audit records

Reasons To Pass

Completer

107 docs 🔺

86 docs 🔺

42 docs -

Revenue

\$17,570,00

\$12,140.00

\$6.980.00

Business: \$49 per user per month Enterprise: Contact PandaDoc

Time to clo

1.84 hours

2.30 hour

2.35 hours

Mobile adaptation is limited Cannot upload multiple documents at once File conversion might take significant time

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.9

14

10.5

79%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

1 Complement to 100% includes those respondents that have not disclosed a breakdown

E-Signature

airSlate

aireSlate

Brookline, MA

501-1,000 employees

airSlate empowers anyone to create powerful documents and automate document workflows. From simple tasks like editing PDFs and creating forms to eSigning, airSlate is everything you need to create, integrate, and automate your document workflow.

www.airslate.com | Twitter: @aireslate



Signing Step 1: these s	signers will be asked to sign first	Recei
Signer 1	Signer1@email.com	= Ne
		= Sig
2	+	- CC: Sig
-		= Sig
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Pricing Model

aireSlate Business: \$8 per user per month aireSlate Business Premium: \$15 per user per month

Reasons To Buy

Offers the ability to automate the sending of group documents upon completion of a prior document

Offers generous trial phase (send up to 50 documents per day) Setup is fast and intuitive

New Signe Signer1@email.con Signer2@email.con Signer3@email.com User1@email.con SAMPLE LETTER OF AGREEMENT Date peaker's Name Address City, State Dear Speaker's Name This letter serves as a formal agreement between Student Organization's Name and Speaker's Na whereby Speaker's Name will provide professional services of XXXXXXXX, on date, time, place. Speaker's Name is being sponsored by the Student Organization's Name and will be compensated for services provided in the amount of \$Amount. Payment will be disbursed upon completion of services. Please sign both copies of this agreement. Retain one copy for your file and return one copy to the Student Organization (or specific office). sident's Signature Text Field

> aireSlate Enterprise: \$30 per user per month airSlate Business Cloud: \$50 per user per month

Reasons To Pass

It is not possible to edit/remove documents from a document template group once it has been sent

Presents some usability issues due to small team and new product

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.1

27

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 10.5 74%

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

E-Signature

Foxit

Foxit

Fremont, CA

101-500 employees

Foxit is a leading software provider of fast, affordable and secure PDF solutions. Businesses and consumers increase productivity by using Foxit's cost effective products to securely work with PDF documents and forms. Foxit is the #1 pre-installed PDF software, shipped on one-third of all new Windows PCs, including those from HP®, Acer, and ASUS®.

www.foxit.com | Twitter: @foxitsoftware





Pricing Model

- PDF Editor: \$14.99 per month
- PDF Editor: \$79 per year
- PDF Editor Pro (Windows): \$149 per year
- PDF Editor Pro (Mac): \$159 per year

Reasons To Buy

Reasons To Pass

Offers all the basic functions at a competitive price

No default templates are provided

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.1

12

8.7

66%

Average Contract Term (Months)

Estimated Payback (Months)



Learn

Sales Coaching

Tools that offer capture, analysis, and feedback related to sales calls to help refine technique, establish best practices, and improve sales win rates.

GONG	44
ZOOMINFO (CHORUS.AI)	45
MINDTICKLE	46
SALESLOFT	47
SALESKEN	48

Additional products included in the category are: Outreach, Salesforce, Clari, Balto, Allego



Observations on Sales Coaching and Criteria for Inclusion

Sales coaching software may integrate with outbound call tracking software to streamline cold dialing and lead follow-up calls and integrate with or share features of web conferencing software for joint/observed calls with clients. These tools may also integrate with sales enablement software and sales performance management software so sellers can access relevant resources and receive feedback on their overall success. Emails and calls captured within a sales coaching platform will often be tied to customer data in the company's CRM software.

To qualify for inclusion in the Sales Coaching category, a product must:

Offer capture, analysis, and feedback tools related to sales calls

Help identify pivotal moments or opportunities in conversations as well as areas for improvement to share with the corresponding salesperson

Integrate with call dialers and/or CRM software to pull and store sales call information

Sales Coaching

Gong

Gong San Mateo, CA <u>1001-</u> 2500 employees

Gong.io enables revenue teams to realize their fullest potential by unveiling customer reality. The patented Gong Revenue Intelligence Platform captures and understands every customer interaction and then delivers insights at scale, empowering revenue teams to make decisions based on data instead of opinions. <u>www.gong.io</u> | Twitter: @Gong_io



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Pricing Model

GONG

Gong has not provided pricing information for this product or service. Contact Gong to obtain current pricing

Reasons To Buy

Keyword search provides significant insights Integrates with Zoom Offers granular analytics (e.g., avg. pause length, word choice) Can playback the speed of the call (e.g., 1.25 or 1.5 speed)

Reasons To Pass

Call recordings are not available in real time Transcriptions on calls are not always 100% accurate

Customer by Size

nis mo



Implementation Method¹



Average Time to Go Live (Months) 0.8 7.5

10.9

79%

Average Contract Term (Months)

Estimated Payback (Months)

SALES COACHING

Chorus.ai

ZoomInfo

San Francisco, CA

2,500-5,000 employees

Chorus.ai is a conversation intelligence platform that helps sales teams win more deals and coach reps to become top performers. Al-based insights help track deal risks, next steps, talk track adoption, and surfaces what works or doesn't work for a specific company's sales cycle.

www.chorus.ai | Twitter: @chorus_ai





Pricing Model

O

Chorus.ai has not provided pricing information. Contact Chorus.ai to obtain current pricing

Reasons To Buy

Offers option to trigger notifications when key terms are used during a sales call (e.g., competitors names, product features, compliance requirements) Provides training playlists for new employees

Reasons To Pass

Automatic note taking that transcribes the conversation is not fully accurate

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.6

4.2

9.4

72%

Average Contract Term (Months)

Estimated Payback (Months)

Sales Coaching

Mindtickle

Mindtickle

San Francisco, CA

501-1,000 employees

Mindtickle provides a comprehensive, data-driven solution for sales readiness and enablement that fuels revenue growth and brand value for dozens of Fortune 500 and Global 2000 companies. Mindtickle enables company leaders and sellers to continually assess, diagnose and develop the knowledge, skills, and behaviors required to effectively engage customers and drive growth.

www.mindtickle.com | Twitter: @mindtickle

Overall Satisfaction Ease of Use 98% 94% Ease of Setup Quality of Support 91% 94% 94% 94%



Mindtickle has not provided

pricing information for this

product or service. Contact

Mindtickle to obtain current

Very user friendly with seamless

Responsive and helpful customer

Reasons To Buy

navigation of the product

pricing

care

Mobile-friendly

Reasons To Pass

There is room for improvement regarding their data reporting and analytics

Customer by Size



Implementation Method¹



Services Team Consultant

Average Time to Go Live (Months) 1.0 10.4

18.8

73%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

SalesLoft

SalesLoft

Atlanta, GA

1,000-2,500 employees

SalesLoft is a sales engagement platform that helps teams set and execute a cadence of communications to convert target accounts into customer accounts. With real-time email tracking and integrated sales dialer and social communications, sales leaders can be confident their reps are executing effective selling processes for their organization.

www.salesloft.com | Twitter: @salesloft



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•	Esther Howard Freight Forward, LLC opened Re: Following up 2 times		Call /w VM Vidyard (day 2 in thread)	Day 3: Step 7 Day 5: Step 8		11 Due 6 Due
	Kristin Watson Terratam		AM Call	Day 6: Step 9 Day 11: Step 14		11 Due 6 Due
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Pricing Model

SalesLoft has not provided pricing information for this product or service. Contact SalesLoft to obtain current pricing

Reasons To Buy

Offers automatic logging of activities (calls, emails, notes, LinkedIn Sales Navigator) to CRM Cadence function enables user to set up a sequence of events (e.g, email a prospect, then follow on LinkedIn, then call them, then email, etc.)

Reasons To Pass

Lacks integration with calendars to book meetings directly through the platform

Analytics are basic

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.1 22.8

81%

Average Contract Term (Months)

Estimated Payback (Months) 9.6

Sales Coaching

Salesken

Salesken

Bangalore, India

100-250 employees

Conversational intelligence platform that helps sales teams improve performance and reduce acquisition costs. The tool gives sales reps real-time cues during their conversation to help them engage their customers better.

www.salesken.ai | Twitter: @SakeskenAi



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One Call
 +91 887 878 8989

Owen Garcia

+91 887 878 8989

Reasons To Pass

Can take a while to learn the tool

Pricing Model

Contact Salesken to obtain current pricing

Reasons To Buy

Offers exceptional customer support Able to predict sales and provide feedback on calls

Customer by Size



Implementation Method¹



eam vendor i hird party Services Team Consultant

Average Time to Go Live (Months) 6.8 12.0

87.5

88%

Average Contract Term (Months)

Estimated Payback (Months)



Organize

CRM

Tools that manage a company's interactions with both current and potential customers, enabling team members to access real-time information (contact information, communication history, customer history, etc.).

SALESFORCE CRM	51
HUBSPOT HUB	52
ACTIVECAMPAIGN	53
ZOHO CRM	41
monday.com	55

Additional products included in the category are: Freshworks, Pipedrive, ClickUp, Constant Contact, Copper



Observations on CRM and Criteria for Inclusion

CRM software is generally delivered separately from other enterprise solutions, such as ERP systems, marketing automation software, and customer service software, but is often integrated with other business applications to facilitate an enhanced and coordinated customer experience.

To qualify for inclusion in the CRM category, a product must:

Provide a bounded set of sales-related functions

Consolidate customer history and transactions into a single interface

Track prospects and contacts throughout the sales pipeline

Facilitate communication at all phases of the customer lifecycle

Integrate functions into a unified database and platform

Salesforce CRM

Salesforce

San Francisco, CA

50,001+ employees

VISIT G2 WEBSITE

Salesforce helps businesses of all sizes accelerate sales, automate tasks, and make smarter decisions through: Lead and Contact Management; Sales Opportunity Management; Workflow Rules and Automation; Customizable Reports and Dashboards; Mobile Application.

www.salesforce.com | Twitter: @salesforce

Overall SatisfactionEase of Use97%79%Ease of SetupQuality of Support79%72%

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			S77,700.00 Biospan, LLC. Qualification	S55,000.00 Anaco Limited Needs Analysis		S124,600.00 Southern Sound Co. Proposal/Quote	S41,100.00 Tyconst Negotiation		Needs Analysis	1,5
								-	Value Proposition	1.3

Pricing Model

Sales Essentials Edition: \$25 per user per month Professional Edition: \$75 per user per month

Reasons To Buy

Provides integrations with sales enablement and marketing tools

Offers connection of leads, opportunities, contacts to keep track of completed and incomplete activities

Offers high level of customization for tailor-made solutions

Customer by Size

* G

0 7

Enterprise Edition: \$150 per user

Unlimited Edition: \$300 per user

Longer average time to go live

Lack of mobile user support

Reasons To Pass

than competitors

per month

per month



Implementation Method¹



Average Time to Go Live (Months)

3.4

22.3

18.1

72%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

Complement to 100% includes those respondents that have not disclosed a breakdown

HubSpot Sales Hub

HubSpot

Cambridge, MA

VISIT G2 WEBSITE

5,001-10,000 employees

HubSpot Sales Hub supercharges your sales process with a powerful and easy-to-use sales CRM that includes sales engagement tools, configure-pricequote (CPQ) functionality, and robust sales analytics for growing teams.

www.hubspot.com | Twitter: @hubspot

Overall SatisfactionEase of Use99%87%Ease of SetupQuality of Support84%86%

<complex-block>

Sales Hub Professional: \$500 for

Sales Hub Enterprise: \$1,200 for

Outside email communication

5 users per month

10 users per month

Reasons To Pass

integration aren't always

Layout requires scrolling

captured in CRM

Pricing Model

Free Edition: \$0, up to 1 users Sales Hub Starter: \$50 for 2 users per month

Reasons To Buy

Create customer success manager User friendly with lots of integrations

Customizable and flexible





Implementation Method¹



Average Time to Go Live (Months) 1.6

14.5

12.9

71%

Average Contract Term (Months)

Estimated Payback (Months)

ActiveCampaign

ActiveCampaign

Chicago, IL

751-1,000 employees

ActiveCampaign helps growing businesses meaningfully connect and engage with customers. Its SaaS platform enables businesses to create optimized customer experiences by automating many processes and communicating with their customers across channels with personalized, intelligencedriven messages.

www.activecampaign.com | Twitter: @ActiveCampaign





Pricing Model

ino. IL USA #74403

- Lite \$9 (per month-paid yearly)
- Plus \$49 (per month-paid yearly)
- Professional \$129 (per month-paid yearly)
- Enterprise \$229+ (per month-paid yearly)

Reasons To Buy

Great option for small businesses Email marketing and automation made simple

Great automation

Reasons To Pass

Campaigns feels limited in design

The system can be slow especially with communication with external CRM

Customer by Size

Activ



Implementation Method¹



Consultant Services Team

Average Time to Go Live (Months) 1 1

11.5

71%

Average Contract Term (Months)

Estimated Payback (Months)

CRM

Zoho CRM

Zoho CRM

Austin, TX

10,001-15,000 employees

Zoho CRM helps you to attract, retain, delight customers and grow your company into a customerfocused organization.

www.zohocrm.com | Twitter: @Zoho



	Advanced CRM A
etain, delight any into a customer-	
'oho	



Mass Update

Change Owner

AUG 12 25 Widget

ALIG 24

SEP 19 🗸

DEAL NAM

80 Widget

20 Widgets

1 Widgets

10 Widget

50 Widge

40 Widgets

Mass Upda

\$10,000 Print Mailing Labels

Delete

\$8.000

\$11,000

\$6,000

\$2,000.00

\$5000.00

\$9,000,00

\$10,000,00

\$500.00

month

Change Own

Revoke Sharing

Value Proposition

Id decision Make

Enterprise: \$40 per user per

Closed Lost

Closed Wor

Pricing Model

Standard: \$14 per user per month Professional: \$23 per user per month

Reasons To Buy

Gamification is a value added to incentivize adoption and usage Great for small side and mid size companies

Reasons To Pass

Hard to import external email into CRM

Limited sandbox test environment

Customer by Size

Q (

ACCOUNT NAME

Aug 30 Jul 27

Aug 18

Sep 10

Sep 20

Sep 22

Jul 25

Oct 10

Oct 23

Nov 11

Smithson Publications

Tony And Presscott Pvt L

Snow white Bakers

Ventura Capitalists

Lawson Associates Blue Rivers Pvt Ltd

Happy Homes

Thomas Publishe

Treble Notes Inc

HID Corporation



Implementation Method¹



Average Time to Go Live (Months) 14.4

4.9

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 66%

11.1

monday.com

monday.com

Tel Aviv, Israel

1,001-2,500 employees

monday sales CRM lets you control your entire sales funnel and close deals faster by automating manual work and streamlining sales activities from A-Z.

https://monday.com| Twitter: @mondaydotcom



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Standard: \$14 per month

Reasons To Pass

Basic and limited functionality of

Automations need updates

Pro: \$24 per month

features

Pricing Model

Individual: \$0 per month Basic: \$10 per month

Reasons To Buy

- integrates with most sales apps and tools
- gives sales teams full control over their sales pipeline, allows them to manage contacts and accounts
- streamlines post-sales processes and sales enablement

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.7

4.7

15.4

72%

Average Contract Term (Months)

Estimated Payback (Months)



TARGET

Sales Intelligence

Tools that collect and organize internal and external data to improve the quality and quantity of sales leads and identify new opportunities to build the pipeline.

LINKEDIN	58
ZOOMINFO	59
APOLLO.IO	60
GROOVE	61
OUTREACH	62

Additional products included in the category are: Dun & Bradstreet, Adapt, Seamless.ai, Uplead, Lusha



Observations on Sales Intelligence and Criteria for Inclusion

This type of software is used by marketing and sales executives to define and implement sales strategies based on their data combined with external data in their CRM software such as lists of prospects, databases of contacts, etc.

To qualify for inclusion in the Sales Intelligence category, a solution must:

Provide information and insights about prospects, which can be combined with business data generated by companies

Include functionality to search company lists, identify potential customers based on custom criteria, and use contact information to approach them

Integrate with sales and marketing software, as well as analytics, business intelligence, or data management solutions

Sales Intelligence

LinkedIn Sales Navigator

LinkedIn

Sunnyvale, CA

25,001+ employees

Sales Navigator makes it simple to establish and grow relationships with prospects and customers by helping users tap into the full power of LinkedIn. Users can focus on the right people, stay up-to-date on what's happening with accounts, and connect to with prospects even if users don't have their contact info. <u>www.business.linkedin.com</u> | Twitter: @LinkedIn



ead filters + Acco Q. Search Bookmarked alerts (23) Highlights for you one activity has been trending akers 🔲 🗙 •• View (D) (x) ·· 12K+ results View article Emery Levin - 1st 🛅 🗸 In CR View (I) (× ·· C shar View (D) (x) ··· ierkan Boyce - 1st 🖸 View (I) (×) ·· GRO 4 shared o Flexis CBM Antoine Martel - 2n **(10** e Kwok - 2nd 🛅 🗸 in CRN Q92 · **Pricing Model**

Core: \$79.99 per user per month Advanced: \$131.25 per user per month Advanced Plus: contact LinkedIn for pricing

Reasons To Buy

Offers powerful advanced filtering options for research Access to the larger LinkedIn community is an asset

Reasons To Pass

User interface presents room for improvement Automation features are basic

Customer by Size

Save

Save

Save

Save

Save



Implementation Method¹



Average Time to Go Live (Months) 0.5

15.7

13.3

59%

Average Contract Term (Months)

Estimated Payback (Months)

Sales Intelligence

ZoomInfo

Zoominfo Vancouver, WA 2,500-5,000 employees

ZoomInfo combines one of the world's most comprehensive business database with best-in-class technology to fuel users' go-to-market strategy from start to finish, and provide an accurate, 360-degree view of customers, prospects, and opportunities. <u>www.zoominfo.com</u> | Twitter: @ZoomInfo



Company List (14/19 x) Database Management x) (50+ IT Er McAfee, Inc The organization evaluating ne Uber Inc. Planning to invest up to \$250,000 Lisa Baez currently serves as Secto **GE** Capital Corporatio tion Security Office Aug 23, 2019 Informatio Security Contingent Workforce Aug 23, 2019 Funding ed \$80 million in Series D funde Aug 21, 2019 an agreement to merge with Signif Belocation salth. The terms of the trans

Pricing Model

ZoomInfo has not provided pricing information. Contact ZoomInfo to obtain current pricing

Reasons To Buy

Offers full integration with Salesforce and SalesLoft to export contacts

Provides "Scoops and Subscribed List" to get email updates when contacts have been added to the database

Virtual training is top-notch

Reasons To Pass

Presents limited advanced filtering for specific industries (e.g., tech industry's emerging sub verticals like Blockchain, Quantum Computing, Robotics, Al/Machine Learning)

Information on company financials are limited

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.6

15.8

13.3

68%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

SALES INTELLIGENCE

Apollo.io

Apollo.io

San Francisco, CA

201-500 employees

The unified Apollo.io platform ensures reps reach the right person, at the right time, with the right message. Access an accurate database of 200+ contacts, full sales engagement stack, dialer, custom in-platform Account Playbooks, custom scoring models for leads, tasks, and accounts from the Scoring Engine, the industry's most advanced Rules Engine, and the industry's only advanced custom Analytics suite.

https://www.apollo.io | Twitter: @MeetApollo



Customer by Size PROSPECTING Home Q Search ≫ Engage \$ Opportunities [™] Enrich [®] Setting Seting Setting Seting Setting Setting Setti Eiltore 4 Apollo Lead 🗉 Lists Database Name Access data on more than 250M people and companies • % Job Titles Titles: sales menager X Persona Company Citria x Microsoft x Sage x Small Business 0 Location Apollo R # Employe Intelligence to Industry Engine A Owner - Technol Improve your revenue strategy ∧ollo.io Implementation Method¹ across your workflow and poost efficiencies Apollo.io A A A **Pricing Model** IN-HOUSE TEAM Professional: \$99 per user per Free: \$0 month Basic: \$49 per user per month Custom: Contact Apollo.io for Average Time to custom pricing Go Live (Months) **Average Contract Reasons To Pass** Reasons To Buy Term (Months) integration into platforms like Unfriendly user interface **Estimated Payback** LinkedIn and Sales Nav (Months) Integrations into CRMs sequence toolkits Average User Adoption

65%

(<50 EMP.)

28%

MID-MAR<u>ket</u>

(51-1000 EMP.)

6%

Vendor

Services Team

7%

ENTERPRISE

(>1000 EMP.)

2%

THIRD PARTY

Consultant

0.2

4.9

15.7

62%

Sales Intelligence

Groove

Groove

San Francisco, CA 51-200 employees

Groove is a sales engagement platform that automates non-sales activities so that sales teams can spend more time building relationships and generating revenue. Groove eliminates the need for CRM data entry and provides managers with real-time visibility into activity levels and performance, regardless of location.

www.groove.co | Twitter: @groove_co



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Our Custor

COMPASS

Collaborate on Pipeline and Account Lists in Real Time

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☆	actes Arrayas		Past Effect no Engagement	-10	41	+	

Reasons To Pass

room for improvement

Lacks support for mobile app

The integrated dialer presents

Pricing Model

Google

Groove has not provided pricing information for this product or service. Contact Groove to obtain current pricing

Reasons To Buy

Offers the industry's only native Salesforce integration, which reduces administrative overhead by as much as 90%

Creates reports in Salesforce to visualize productivity

Calendar scheduler is integrated within outgoing emails

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.5

9.1

9.1

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 60%

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

Sales Intelligence

Outreach

Outreach

Seattle, WA

1,001-2,500 employees

By automating and prioritizing all customer touch points throughout the sales process, Outreach triples the productivity of sales teams by empowering them to drive more pipeline, book more meetings, and exceed revenue goals. Outreach places actionable data intelligence at the fingertips of sales reps through a single, integrated view of all prospect information.

https://www.outreach.io | Twitter: @outreach_io





Pricing Model

Outreach has not provided pricing information. Contact Outreach to obtain current pricing

Reasons To Buy

Offers A/B testing function on emails and campaign insights Automation of sequences is helpful when it comes to campaign prospecting Provides full integration with Gmail and automatic tracking and recording of emails

Reasons To Pass

Mobile version is not available yet Lacks integration with LinkedIn Sales Navigator

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.2 15.5

76%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

Complement to 100% includes those respondents that have not disclosed a breakdown



ENGAGE

Marketing Automation

Tools that help marketers to capture leads, nurture them further down the sales funnel, and analyze lead behavior and campaign performance.

HUBSPOT MARKETING HUB	65
ACTIVECAMPAIGN	66
KLAVIYO	67
BRAZE	68
SHARPSPRING (CONSTANT CONTACT)	69

Additional products included in the category are: Mailchimp, Sendinblue, Insider, Bloomreach, Omnisend



Observations on Marketing Automation and Criteria for Inclusion

Marketing automation products often integrate with CRM software, social media management software, CMS tools, and account-based orchestration platforms.

To qualify for inclusion in the Marketing Automation category, a product must:

Automate two or more of the following: email, social media, SMS, and digital ads

Provide advanced email marketing capabilities including (e.g., A/B testing, spam filter testing, scheduling)

Act as a central database for marketing information and interactions

Allow dynamic segmentation of marketing campaign targets

Contact targets across multiple channels after specific actions

Perform lead management to include lead nurturing and lead scoring

Generate forms and landing pages to collect prospect information

Provide analytics and reports that track the lifecycle of a campaign

HubSpot Marketing Hub

HubSpot

Cambridge, MA

5,000-10,000 employees

HubSpot portfolio is comprised of Marketing Hub, Sales Hub, Service Hub, and a powerful free CRM. HubSpot gives companies the tools they need to grow better.

www.hubspot.com | Twitter: @HubSpot

Overall Satisfaction Ease of Use 100% 86% Ease of Setup Quality of Support 81% 88% VISIT G2 WEBSITE



Pricing Model

Marketing Hub Free: \$0 Marketing Hub Starter: \$50 per month

Reasons To Buy

Offers effective workflow and automation capabilities Provides full integration with several applications/platforms Content Calendar combines projects and makes it seamless to see upcoming activities across marketing teams Marketing Hub Professional: \$800 per month Marketing Hub Enterprise: \$3,200 per month

Reasons To Pass

Lacks A/B testing feature for a workflow

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.8

34.9

15.0

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

67%

Complement to 100% includes those respondents that have not disclosed a breakdown

ActiveCampaign

ActiveCampaign

Chicago, IL

501-1,000 employees

ActiveCampaign gives businesses of all sizes access to hundreds of pre-built automations that combine email marketing, marketing automation, CRM, and machine learning for powerful orchestration, segmentation, and personalization across social, email, messaging, chat, and text. 300+ integrations. <u>www.activecampaign.com</u> | Twitter: @ActiveCampaign





Pricing Model

Lite: \$9 per month (billed yearly) Plus: \$49 per month (billed yearly)

Reasons To Buy

Offers large variety of tools and functions in a single platform Automations are easy and intuitive to set up Professional: \$129 per month (billed yearly) Enterprise: \$229 per month (billed yearly)

Reasons To Pass

Customizations and general sophistication require some time for learning how to fully leverage the tool

Sorting abilities in contacts are limited (one list and/or tag rather than multiple criteria)

Customer by Size



Implementation Method¹



ouse ieam vendor i hird party Services Team Consultant

Average Time to Go Live (Months) 1.0

16.7

10.9

70%

Average Contract Term (Months)

Estimated Payback (Months)

Klaviyo

Klaviyo

Boston, MA

1,000-2,500 employees

Klaviyo is growth marketing platform that helps users deliver more personalized experiences across owned marketing channels like email, SMS, in-app notifications, and app.

www.klaviyio.com | Twitter: @klaviyo



Automations help you make money while you sleep

Dozens of built-in automations are fully customizable, like welcome emails, happy birthday, or abandon cart. Each can have any mix of emails and texts. So while you're dreaming up your next big idea, customers are automatically getting timely, actionable info.

Pricing Model

current pricing

use

Reasons To Buy

Intuitive and effective

Klaviyo has not provided pricing information for this product or

service. Contact Klaviyo to obtain

Interface is simple and easy to

Pre-made flows and templates.



he products they love, the way they shop, the best time

So when Cindy in Cincinnati checks her email and sees the

eather bag of her dreams, she feels like it's written just for

and method to reach them

her (because it is)



Reasons To Pass

and may be hard to learn

Lacks automatic spell check in

the Can feel overwhelming at first

Customer by Size



Implementation Method¹



jse Team Vendor Third Party Services Team Consultant

Average Time to Go Live (Months) 0.8

4.9

6.3

75%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

² Complement to 100% includes those respondents that have not disclosed a breakdown

67

Braze

BRAZE

New York, NY 1,000-2,500 employees

Braze is a comprehensive customer engagement platform that powers relevant and memorable experiences between consumers and the brands they love. Context underpins every Braze interaction, helping brands foster human connection with consumers through interactive conversations across channels that deliver value quickly and continuously.

https://braze.com | Twitter: @Braze



Pricing Model

Braze has not provided pricing information for this product.

Reasons To Buy

User-friendly interface Speed of the response by support team

Reasons To Pass

Can be hard to implement Lack of customization (but currently rolling out an editor)

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 3.5 36.7

17.1

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

SHARPSPRING

Constant Contact

Waltham, MA

2,500-5,000 employees

SharpSpring is one of the most flexible comprehensive marketing automation platform on the market, offering powerful, behavior-based email marketing, native or 3rd party CRM integration, dynamic forms, landing page and blog builders, social media management, universal CMS compatibility, and integration with hundreds of applications.

<u>www.sharpspring.com</u> | Twitter: @ConstantContract

Overall Satisfaction Ease of Use 90%
85%
Ease of Setup Quality of Support
83%
91%
VISIT G2 WEBSITE

A conception of the concept

5,000 Contacts: \$699 per month

Reasons To Pass

compared to the desktop

Advanced custom reporting

features are limited

application

Mobile app still has some gaps

Pricing Model

Agency: contact SharpSpring for agency partner plans 1,000 Contacts: \$399 per month 2,500 Contacts: \$499 per month

Reasons To Buy

Email builder is approachable for non-coders, but offers the ability to edit HTML

Integration with third-party forms is simple and allows the use of all pre-existing forms

Offers several options for customizations

Customer by Size



Implementation Method¹



duse ieam vendor i hird party Services Team Consultant

Average Time to Go Live (Months) 1.4

12.9

9.7

65%

Average Contract Term (Months)

Estimated Payback (Months)



ENGAGE

Sales Engagement

Tools that streamline the sales process by combining sales and marketing efforts to create personalized and automated sales journeys across all potential touchpoints (email, calls, social media, SMS/text, video, live chat, etc.).

HUBSPOT SALES HUB	72
SALESLOFT	73
APOLLO.IO	74
OUTREACH	75
ActiveCampaign	76

Additional products included in the category are: Groove, Reply.io, Freshworks, MixMax, SalesHandy



Observations on Sales Engagement and Criteria for Inclusion

Sales engagement software will integrate with existing sales solutions, such as a team's CRM software, email software, email tracking software, outbound call tracking software, sales intelligence software or lead intelligence providers, and sales enablement software for content management, among others.

To qualify for inclusion in the Sales Engagement category, a product must:

Be a sales-facing product meant for daily use by sales representatives

Integrate sales communication channels (email, calls, social, etc.) within one cohesive platform

Manage standardized sales content such as email templates, call scripts, presentations, social posts, and other marketing materials

Automate multichannel communication sequences and workflows Provide analytics or insights into sales performance
Sales Engagement

HubSpot Sales Hub

HubSpot

Cambridge, Massachusetts 5,001-10,000 employees

Sales Hub is a powerful and easy-to-use sales CRM that includes sales engagement tools, configure-pricequote (CPQ) functionality, and robust sales analytics for growing teams.

www.hubspot.com | Twitter: @hubspot

Overall SatisfactionEase of Use97%87%Ease of SetupQuality of Support84%86%

VISIT G2 WEBSITE

Ease of Use



Pricing Model

Free HubSpot CRM: \$0 Sales Hub Starter: \$50 per month (2 paid users)

Reasons To Buy

Mobile app is well designed Offers possibility of multi-step prospecting sequence It is possible to receive direct

support from HubSpot through the "chat support" feature Sales Hub Professional: \$500 per month (5 paid users) Sales Hub Enterprise: \$1200 per month (10 paid users)

Reasons To Pass

Lacks integration with Microsoft Teams Does not have extensive reporting to drill-down data for several layers

Customer by Size



Implementation Method¹



Average Time to Go Live (Months)

Average Contract

Estimated Payback

Term (Months)

(Months)

Adoption

Average User

12.3

1.0

14.6

74%

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

SalesLoft

SalesLoft

Atlanta, GA

1,001 – 5,000 employees

SalesLoft is a sales engagement platform that helps teams set and execute a cadence of communications to convert target accounts into customer accounts. With real-time email tracking and integrated sales dialer and social communications, sales leaders can be confident their reps are executing effective selling processes for their organization.

www.salesloft.com | Twitter: @salesloft

Overall Satisfaction Ease of Use 97%
88%
Ease of Setup Quality of Support
85%
87%

SalesLof * - = ? 호 . C Day 1 Step 1 A - Phone Call /wo VM L Call /w VM Instructions Call Script mry Seinfeld Import to Sale Sorted by Timezon 770-756-8026 Ca Jerry Seinfeld unt Manager at SalesLol Profile 1 SelesLoft A Skip St DETAILS ACTIVITY Stephen Gladney Account Executive at SalesLo Cadence Stage Send Em... Disgualified L1 20 00 00

Lead Source

SalesLoft (Prospector

Campaign Tag Contac

770-756-8026 Call

Pricing Model

SalesLoft has not provided pricing information for this product or service. Contact SalesLoft to obtain current pricing

Reasons To Buy

Offers automatic logging of activities (calls, emails, notes, LinkedIn Sales Navigator) to CRM Cadence function enables user to set up a sequence of events (e.g, email a prospect, then follow on LinkedIn, then call them, then email, etc.)

Reasons To Pass

Filter Timeline 👻

Next Steps

Analytics and dashboard customization can be limited Integrations require maintenance

Kelly Hamilton

Allen English

00 00 00 00

00 00 02 01

Customer by Size



Implementation Method¹



Average Time to Go Live (Months)

Average Contract

Term (Months)

(Months)

1.0 12

9.0

80%

Average User Adoption

Estimated Payback

SALES INTELLIGENCE

Apollo.io

Apollo.io

San Francisco, CA

201-500 employees

The unified Apollo.io platform ensures reps reach the right person, at the right time, with the right message. Access an accurate database of 200+ contacts, full sales engagement stack, dialer, custom in-platform Account Playbooks, custom scoring models for leads, tasks, and accounts from the Scoring Engine, the industry's most advanced Rules Engine, and the industry's only advanced custom Analytics suite. https://www.apollo.io | Twitter: @MeetApollo





1 Complement to 100% includes those respondents that have not disclosed a breakdown

27%

MID-MARKET

(51-1000 EMP.)

6%

Vendor

Services Team

6%

ENTERPRISE

(>1000 EMP.)

3%

THIRD PARTY

Consultant

0.2

11.9

11.1

60%

Sales Intelligence

Outreach

Outreach

Seattle, WA

1,001 - 5000 employees

By automating and prioritizing all customer touch points throughout the sales process, Outreach triples the productivity of sales teams by empowering them to drive more pipeline, book more meetings, and exceed revenue goals. Outreach places actionable data intelligence at the fingertips of sales reps through a single, integrated view of all prospect information.

https://www.outreach.io | Twitter: @outreach_io





Pricing Model

Outreach has not provided pricing information. Contact Outreach to obtain current pricing

Reasons To Buy

Offers A/B testing function on emails and campaign insights Automation of sequences is helpful when it comes to campaign prospecting Provides full integration with Gmail and automatic tracking and recording of emails

Reasons To Pass

Mobile version is not available yet List building has limitations

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.1 12

10.2

76%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

Complement to 100% includes those respondents that have not disclosed a breakdown

MARKETING AUTOMATION

ActiveCampaign

ActiveCampaign

Chicago, IL

501-1,000 employees

ActiveCampaign gives businesses of all sizes access to hundreds of pre-built automations that combine email marketing, marketing automation, CRM, and machine learning for powerful orchestration, segmentation, and personalization across social, email, messaging, chat, and text. 300+ integrations. <u>www.activecampaign.com</u> | Twitter: @ActiveCampaign





Pricing Model

Lite: \$9 per month (billed yearly) Plus: \$49 per month (billed yearly)

Reasons To Buy

Offers large variety of tools and functions in a single platform Automations are easy and intuitive to set up Professional: \$129 per month (billed yearly) Enterprise: \$229 per month (billed yearly)

Reasons To Pass

Customizations and general sophistication require some time for learning how to fully leverage the tool

Sorting abilities in contacts are limited

Customer by Size



Implementation Method¹



eam vendor i hird party Services Team Consultant

Average Time to Go Live (Months) 1.0

12

9.5

73%

Average Contract Term (Months)

Estimated Payback (Months)



ENGAGE

Email Tracking

Tools that track emails and collect analytics (e.g., email open rates, clicks volume, number of attachment downloads) to identify optimal engagement points and improve effectiveness of outreach campaigns.

HUBSPOT SALES HUB	79
SALESLOFT	80
OUTREACH	81
GROOVE	82
MIXMAX	83

Additional products included in the category are: monday.com, Freshworks, Reply.io, GMass, InsideSales



Observations on Email Tracking and Criteria for Inclusion

Email tracking software integrates directly with email platforms and is often implemented as an addition to complementary sales and marketing products, such as CRM software and email marketing software products, to form a complete sales force automation system.

To qualify for inclusion in the Email Tracking category, a product must:

- Integrate with email platforms so that users can create, manage, send, schedule, and track inbound and outbound emails
- Enable users to schedule emails according to a diverse range of factors such as time constraints, geographic distribution of prospects, and prospect status
- Notify users when various actions (e.g., email opened, reply sent, attachment downloaded) are performed by the recipient
- Allow users to categorize inbound and outbound email communications according to tags, lists, and sales priority
- Deliver analytics on basic and advanced email use information to understand how emails are received

Email Tracking

HubSpot Sales Hub

HubSpot

Cambridge, MA

1,001-5,000 employees

HubSpot Sales Hub gives users a full suite of tools to boost productivity, shorten deal cycles, and make the sales process more human-friendly.

www.hubspot.com | Twitter: @hubspot





Pricing Model

Free HubSpot CRM: \$0 Sales Hub Starter: \$50 per month (2 paid users)

Reasons To Buy

Mobile app is well designed

Offers possibility of multi-step prospecting sequence

It is possible to receive direct support from HubSpot through the "chat support" feature Sales Hub Professional: \$500 per month (5 paid users) Sales Hub Enterprise: \$1200 per month (10 paid users)

Reasons To Pass

Lacks integration with Microsoft Teams

Does not have extensive reporting to drill-down data for several layers

Customer by Size¹



Implementation Method¹



Average Time to

2.0

12

Average Contract Term (Months)

Go Live (Months)

Estimated Payback (Months)

Average User Adoption 14.3

74%

SalesLoft

SalesLoft

Atlanta, GA

501-1,000 employees

SalesLoft is a sales engagement platform that helps teams set and execute a cadence of communications to convert target accounts into customer accounts. With real-time email tracking and integrated sales dialer and social communications, sales leaders can be confident their reps are executing effective selling processes for their organization.

www.salesloft.com | Twitter: @salesloft



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		/ Deal MSCI	40 days	dank a d	76	Discovery	4 days	Apr 29, 2022		2	Hot Lead: Casey Bohm
	T Model										

Reasons To Pass

the platform

Analytics are basic

Lacks integration with calendars

to book meetings directly through

Pricing Model

SalesLoft

shine Lev

Loft junink free salesloft.com

> SalesLoft has not provided pricing information for this product or service. Contact SalesLoft to obtain current pricing

Reasons To Buy

Offers automatic logging of activities (calls, emails, notes, LinkedIn Sales Navigator) to CRM

Cadence function enables user to set up a sequence of events (e.g, email a prospect, then follow on LinkedIn, then call them, then email, etc.)

Customer by Size



Implementation Method¹



Average Time to Go Live (Months)

1.2

12.1

94

80%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

EMAIL TRACKING

Outreach

Outreach

Seattle, WA

1,001-1,500 employees

By automating and prioritizing all customer touch points throughout the sales process, Outreach triples the productivity of sales teams by empowering them to drive more pipeline, book more meetings, and exceed revenue goals. Outreach places actionable data intelligence at the fingertips of sales reps through a single, integrated view of all prospect information.

www.outreach.io | Twitter: @outreach_io





Revenue to Date

Pricing Model

Outreach has not provided pricing information. Contact Outreach to obtain current pricing

Reasons To Buy

Offers A/B testing function on emails and campaign insights

Automation of sequences is helpful when it comes to campaign prospecting

Provides full integration with Gmail and automatic tracking and recording of emails

Reasons To Pass

Mobile version is not available yet

Lacks integration with LinkedIn Sales Navigator

Customer by Size

9

RP

67%

08/29/19 48 days krt \$20,

\$30,000

My Team

Brad Cunningham



Implementation Method¹



Average Time to Go Live (Months) 1.2

12.4

10.7

75%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

Complement to 100% includes those respondents that have not disclosed a breakdown

Email Tracking

Groove

Groove

San Francisco, CA

101-250 employees

Groove is a sales engagement platform that improves productivity by automating time consuming tasks such as email logging, outbound call logging, activity capture, and meeting scheduling without data latency or sync errors. Built for enterprise and mid-market companies, Groove is easy-to-use and highly configurable.

www.grove.co | Twitter: @groove_co



groove The #1 sales engagement platform for companies that use Salesforce

. Ada fee 🕘

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ŝ.	Activities This Week		
	And the second second		

Capital One

Our Custor

Collaborate on Pipeline and Account Lists in Real Time



Pricing Model

Google

Groove has not provided pricing information for this product or service. Contact Groove to obtain current pricing

Reasons To Buy

Integrates well with Salesforce Exceptional at tracking activities Easy way to automate Efficient sales engagement tool

Reasons To Pass

New tools and updates can be hard to keep up with <u>Set up can be intensive</u>

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.3

3.5

10.3

68%

Average Contract Term (Months)

Estimated Payback (Months)

Email Tracking

Mixmax

Freshworks

San Francisco, CA

51-200 employees

Mixmax makes Gmail your 'workflow control center' so you win more deals, engage more customers and streamline recruiting processes.

www.mixmax.com | Twitter: @Mixmax



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Customer by Size



Implementation Method¹



se Ieam Vendor Third Party Services Team Consultant

Average Time to Go Live (Months) .05

4.5

9.7

68%

Average Contract Term (Months)

Estimated Payback (Months)



ENGAGE

Live Chat

Tools that open an instant messaging channel between customer service representatives and website visitors, to provide support to users who have questions regarding products.

ZENDESK CHAT	86
INTERCOM	87
ZOHO DESK	88
PODIUM	89
Tidio	90

Additional products included in the category are: Drift, Freshchat, BirdEye, UJET



Observations on Live Chat and Criteria for Inclusion

Live chat functionality may come as a feature of other software types including e-commerce platforms and help desk software products.

To qualify for inclusion in the Live Chat category, a product must:

Provide instant messaging capabilities between customer service representatives and website visitors

Allow chat windows to either initiate conversation or live independently on a website for potential inquiries

Zendesk Chat

Zendesk

San Francisco, CA

1,001-5,000 employees

Zendesk Chat live chat solution helps businesses increase sales conversion by engaging important leads on their websites.

www.zendesk.com | Twitter: @ZendeskChat



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Support Only: \$19 per user per

Suite Team: \$49 per user per

monthly, billed annually

month, billed annually

Reasons To Buy

data on trends

conversation

After-chat notes function is

It is easy to create macros

useful to organize and collect

The history function allows users

and reference to a previous

to see missed chats and go back

- Advanced: \$79 per user per month, billed annually
- Premium: \$99 per user per month, billed annually

Reasons To Pass

- It is not possible to edit a reply once it has been delivered
- Pricing is slightly above average for the category

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.6

7.7

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 13.2 74%

Intercom

Intercom

San Francisco, CA

501-1000 employees

Intercom is a Conversational Relationship Platform (CRP). With Intercom, users can build better customer relationships through personalized, messenger-based experiences across the customer journey.

www.intercom.com | Twitter: @intercom



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 Intercom has not provided pricing information. Contact Intercom to obtain current pricing

Reasons To Buy

Pricin

- Mobile application is clean and easy to use
- Offers multiple integrations for the inbox without adding extra complexity

Reasons To Pass

- Lacks native integration between Intercom and Google Data Studio
- Segmentation can be cumbersome for first time users

Customer by Size



Implementation Method¹



Services Team Consultant

Average Time to Go Live (Months) 1.2

4.4

14.0

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 75%

Zoho Desk

Zoho Desk

Austin, Texas

10,001-20,000 employees

Zoho Desk pulls in all your customer interactions from across multiple channels into single, clean interface. You can seamlessly continue these conversations and help customers easily.

www.zohodesk.com | Twitter: @Zoho



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cing Model	Picity M 3 and the form	
er: free per 3 users		Professional: \$23 per user per

Standard: \$14 per user per month
 Enterprise: \$40 per user per

Pric

Fre

Reasons To Buy

Easy and smooth set up.

Cost effective and efficient.

Seamless ticketing process.

Reasons To Pass

month

 Integration with Zoho forms could be improved.

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.6

3.8

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 10.8 50%

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

Email Tracking

HubSpot Service Hub

HubSpot

Cambridge, MA

1,001-5,000 employees

Customer service software that makes it easy to manage and connect with customers, and truly help them succeed. You'll make customers happier, keep them longer, and grow your business faster. Service teams can show the value of their work and prove an actual return on investment platform

.www.hubspot.com | Twitter: @hubspot

Overall Satisfaction

Ease of Use

87%

93% Ease of Setup 83%

VISIT G2 WEBSITE

Quality of Support

89%

Pricing Model

Free HubSpot: \$0 Sales Hub Starter: \$50 per month (2 paid users)

Reasons To Buy

Mobile app is well designed

Offers possibility of multi-step prospecting sequence

It is possible to receive direct support from Hubspot through the "chat support" feature Sales Hub Professional: \$500 per month (5 paid users) Sales Hub Enterprise: \$1200 per month (10 paid users)

Reasons To Pass

Lacks integration with Microsoft Teams

Does not have extensive reporting to drill-down data for several layers

Customer by Size¹



Implementation Method¹



Average Time to Go Live (Months) 2.0

12

19.1

68%

Average Contract Term (Months)

Estimated Payback (Months)

Podium

Podium Lehi, UT 501-1,000 employees

Podium's Interaction Management platform uses messaging to make it convenient to interact with leads, customers, and teams at every customer touchpoint. With Podium, users can message leads and customers, get reviews and feedback, collect payment, and communicate easily with the team, all in one easy-to-use inbox.

www.podium.com | Twitter: @PodiumHQ





Pricing Model

 Podium has not provided pricing information. Contact Podium to obtain current pricing

Reasons To Buy

- The mobile app is well designed and user friendly
- Offers high speed of operations

Reasons To Pass

- Team Chat sidebar seems to be over-simplified, making it difficult to differentiate between groups of chats
- Portfolio of message templates is limited

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.9

7.2

11.9

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 74%



Convert

CPQ

Tools that automate the lifecycle of the quoting and proposal process (configuration logic for the offering, standard and custom pricing, and quote tracking) to accelerate the sales process while improving quote accuracy and customer relations.

SALESFORCE CPQ	93
HUBSPOT SALES HUB	94
DEALHUB.IO	95
PANDADOC	96
Paperless Parts	97

Additional products included in the category are: IBM Sterling Configure, Price, Quote, KBMax, Experlogix CPQ



Observations on CPQ and Criteria for Inclusion

Products are typically built on an existing CRM software product or designed to integrate with one (or more) CRM tools.

To qualify for inclusion in the CPQ category, a product must:

- Include features for the basic activities that are part of the configure, price, quote lifecycle: configuration logic for the offering, standard and custom pricing, and quote tracking
- Provide information that salespeople can use to quickly create offers that are beneficial for both the customer and the company
- Offer workflows for users to create, modify, send, and track quote documents in different formats
- Allow the use of CRM software, ERP systems, and other enterprise software data to define and manage product catalogs including pricing and bundling for hundreds or thousands of products
- Evaluate the profitability of each offering based on financial rules, customer pricing, costs, and external factors like competitors, market changes, and laws and regulations

Salesforce Revenue Cloud

Salesforce

San Francisco, CA

50,001+ employees

Salesforce CPQ automates quoting, contracting, and the ordering process. The solution improves sales productivity and helps users close more deals without ever leaving Salesforce. Fully native on the Salesforce platform, Salesforce CPQ delivers next-generation CPQ which is 5-10x easier to implement than legacy CPQ applications.

www.salesforce.com | Twitter: @SalesforceCPQ

Overall Satisfaction Ease of Use

 88%
 83%

 Ease of Setup
 Quality of Support

 78%
 85%

 VISIT G2 WEBSITE

Configure a Product or Service with 100% Accuracy

Pricing Model

- CPQ: \$75 per user per month, billed annually
- CPQ+: \$150 per user per month, billed annually

Reasons To Buy

 Adaptability and breadth of functionality makes it suitable for diverse industries

Reasons To Pass

 The high number of functionalities calls for extensive training to ensure compliance and buy-in from sales reps

•

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 4.1

14.9

16.9

68%

Average Contract Term (Months)

Estimated Payback (Months)

HubSpot Sales Hub

HubSpot

Cambridge, MA

5,001-10,000 employees

HubSpot Sales Hub supercharges your sales process with a powerful and easy-to-use sales CRM that includes sales engagement tools, configure-pricequote (CPQ) functionality, and robust sales

analytics for growing teams.

www.hubspot.com | Twitter: @hubspot





Reasons To Buy

Create customer success

User friendly with lots of

Customizable and flexible

manager

integrations

Sales Hub Enterprise: \$1,200 for 10 users per month

Reasons To Pass

- Outside email communication integration aren't always captured in CRM
- Layout requires scrolling

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.3

10.9

19.6

82%

Average Contract Term (Months)

Estimated Payback (Months)

DealHub.io

DealHub.io

CPQ

Los Altos, CA

11-50 employees

DealHub is an award-winning Sales Engagement and CPQ platform that delivers a personalized buying experience at every step of the sales and prospecting funnels. DealHub enables Sales reps and buyers to meet, engage, and collaborate online on relevant, personalized, and dynamic content, while gaining realtime insights on buyer engagement and disposition.

www.dealhub.io | Twitter: @DealHubIO





CPQ+: Available upon request

Reasons To Buy

- Flexibility and adaptability are among the best on the market
- Implementation time is short

Reasons To Pass

 It is not possible for customers to upload documents in the DealRoom

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 2.8

15.4

11.0

77%

Average Contract Term (Months)

Estimated Payback (Months)

PandaDoc

PandaDoc

San Francisco, CA

500-750 employees

PandaDoc provides an all-in-one document workflow automation platform that helps fast scaling teams accelerate the ability to create, manage, and sign digital documents including proposals, quotes, contracts, and more.

www.pandadoc.com | Twitter: @pandadoc



Proposal Contracts PROPOSAL TEMPLA Quotes Agreement Business Plans Forms Receipts Invoices Accounting & Tax Car PROGRESS REPORT Construction Viewed Consulting Education Employme 358 280 Family Financial \$60,144.00 Helthcare > \$43,960.00

LEADERBOARD

Meg Rigden

Pafaada El Nous

enior Sales Manage

235

\$36,690.00

Time to clos

1.84 hours

2.30 hour:

2.35 hours

Revenue

\$17,570.00

\$12,140.00

\$6.980.00

Business: \$49 per user per month

Enterprise: Contact PandaDoc

Reasons To Pass

Cannot upload multiple

documents at once

Mobile adaptation is limited

File conversion might take time

Completer

107 docs 🔺

86 docs 🔺

42 docs 👻

Pricing Model

- Free eSign: free
- Essentials: \$19 per user per month

Reasons To Buy

- Offers a varied and dynamic workflow management, accessible without the internet
- Provides flexible formatting and high degree of customization
- Easy to use, intuitive, and integrates





Implementation Method¹



duse Ieam Vendor Third Party Services Team Consultant

Average Time to Go Live (Months) 1.1 7.7

8.3

78%

Average Contract Term (Months)

Estimated Payback (Months)

Proposal

Proposify

Proposify.biz

Halifax, Canada

51-200 employees

Proposify helps sales teams streamline the process of creating, sending, and closing proposals, quotes, contracts, and other sales documents. It provides a simple way of delivering beautiful, winning proposals to clients.

www.proposify.com | Twitter: @proposify





Proposify Free: free

Reasons To Buy

proposals quickly

value added

month

Team Plan: \$49 per user per

Beautiful templates makes it

easy to build, tailor, and tweak

Function to live chat with client

as they go through proposal is a

Business Plan: \$590 per business per month

Reasons To Pass

Drag and drop feature is limited Lacks search feature in the image library

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.2

10.9

5.5

79%

Average Contract Term (Months)

Estimated Payback (Months)



Convert

Partner Management

Tools that improve communications with business partners (suppliers, distributors, resellers, etc.) by providing them with a portal to access documents, campaign materials, market development funds (MDF), opportunities, and deals.

PARTNERSTACK	100
IMPACT	101
ZINIFI SOLUTIONS	102
IMPARTNER SOFTWARE	103
ZIFT SOLUTIONS	104

Additional products included in the category are: Impartner PRM, Everflow, Salesforce Partner Relationship Management, TUNE, PartnerTap



Observations on Partner Management and Criteria for Inclusion

Partner management software delivers optimal results when used with other software solutions that track partner pipeline progression and engagement within the portal.

To qualify for inclusion in the Partner Management category, a product must:

- Offer portals to communicate and exchange information and content between a company and its partners, and optionally with prospects or customers
- Provide onboarding, training, and certification of partners
- Manage who has access to what information and decide which access rights are available for each user, group, role, etc.
- Include workflows for major business processes that involve the company and its partners, including notifications and alerts defined according to business rules
- Track and measure the effectiveness of MDF, co-op and cobranded partner activities

PartnerStack

PartnerStack Inc.

Toronto, Canada

51-200 employees

PartnerStack enables companies to leverage partnerships in order to grow revenue, increase distribution, and go to market quicker and more efficiently. The fastest growing software companies in the world like Asana, Drift, Freshworks, and Intuit use PartnerStack to power their reseller, marketing, and referral partner programs.

www.partnerstack.com | Twitter: @PartnerStack





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Pricing Model

 PartnerStack has not provided pricing information for this product or service. Contact Partnerstack to obtain current pricing

Reasons To Buy

 Onboarding and customer success team is top-notch, making migration process smooth

Reasons To Pass

- Analytics are limited
- Lacks option to clone email from one Partner group to another

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.8

1.3

8.1

53%

Average Contract Term (Months)

Estimated Payback (Months)

Impact

Impact.com

Santa Barbara, CA

1,000 + employees

Impact.com, the leading global partnership management platform has been transforming the way enterprises discover and manage all types of partnerships, including affiliates, influencers, commerce content publishers, B2B, and more – the purpose build platform helps businesses, brands, publishers, and agencies to build authentic, enduring and rewarding relationships with publishers and consumers.

www.Impact.com | Twitter: @impactdotcom

Overall Satisfaction

Ease of Use





Pricing Model

 Impact.com has not provided pricing information. Contact Impact.com to obtain current pricing

Reasons To Buy

- Strong and flexible reporting capabilities
- Responsive customer support and service

Reasons To Pass

 Custom integrations can be difficult to setup

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 2.2

9

12.4

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 66%

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

ZINFI

ZINFI Technologies, Inc.

Pleasanton, CA

201-500 employees

ZINFI's Unified Channel Management (UCM) platform enables vendors to drive profitable revenue growth by deploying a set of cloud-based modules for partner recruitment, engagement, enablement, and management that seamlessly work together by fitting into an existing infrastructure.

www.zinfi.com | Twitter: @ZINFITech





Reasons To Buy

- Intuitive interface makes the onboarding process fast
- Support is effective in solving any challenge that could arise

Reasons To Pass

 Options for customization are limited

Customer by Size



Implementation Method¹



Vendor I hird Party Services Team Consultant

Average Time to Go Live (Months) 2.5

8.4

50%

Average Contract Term (Months)

Estimated Payback (Months)

PARTNER MANAGEMENT

Impartner PRM

Impartner PRM

South Jordan UT

200 - 500 employees

Impartner helps companies worldwide manage their relationships with distributors, resellers, and channel partners, drive demand and accelerate revenue through indirect sales ecosystems

www.impartner.com | Twitter: @impartnerprm





38%

ENTERPRISE

(>1000 EMP.)

14%

Third Party

Consultant

4.7

17%

54%

103

5.2

Zift Solutions

Zift Solutions

Jersey City, NJ

101-250 employees

ZiftONE is an all-in-one PRM, Channel Marketing & Channel Learning solution. Speed time-to-sales, create an exceptional partner experience, and provide faster ROI -- with one platform.

www.ziftsolutions.com | Twitter: @zift





Pricing Model

 Zift Solutions has not provided pricing information. Contact Zift to obtain current pricing

Reasons To Buy

- Great social media functionality.
- Ability to personalize campaigns.

Reasons To Pass

- Salesforce integration requires improvements
- Email building platforms has room for further flexibility.

Customer by Size

367

0.01

\$36.8



Implementation Method¹



SERVICES TEAM CONSULTANT

Average Time to Go Live (Months) 5.4

2.6

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 22.4 41%



Learn

Sales Performance Management

Tools that manage and record sales performance on a team and individual basis through scorecards to determine success and proactively guide personnel to improve their sales capabilities.

HUBSPOT SALES HUB	107
SALESLOFT	108
MINDTICKLE	109
monday.com	110
Scratchpad	111

Additional products included in the category are: Outreach, CaptivatelQ, Ambition, Spiff, Groove



Observations on Sales Performance Management and Criteria for Inclusion

Many sales performance management products integrate with CRM software.

To qualify for inclusion in the Sales Performance Management software category, a product must:

- Manage and record sales performance on a team and individual basis
- Provide visuals to accompany sales performance data
- Monitor progress in relation to team and individual goals and provide tools for course correction
- Offer reports on data that aid in understanding successes and failures

Sales Performance Management

HubSpot Sales Hub

HubSpot

Cambridge, Massachusetts

5,001-10,000 employees

Sales Hub is a powerful and easy-to-use sales CRM that includes sales engagement tools, configure-pricequote (CPQ) functionality, and robust sales analytics for growing teams.

www.hubspot.com | Twitter: @hubspot

Overall Satisfaction Ease of Use 94%
87%
Ease of Setup Quality of Support
84%
86%
VISIT G2 WEBSITE

<complex-block>

- Free HubSpot CRM: \$0
- Sales Hub Starter: \$50 per month (2 paid users)

Reasons To Buy

- Mobile app is well designed
- Offers possibility of multi-step prospecting sequence
- It is possible to receive direct support from Hubspot through the "chat support" feature

 Sales Hub Professional: \$500 per month (5 paid users)

5 13

 Sales Hub Enterprise: \$1200 per month (10 paid users)

Reasons To Pass

- Lacks integration with Microsoft Teams
- Does not have extensive reporting to drill-down data for several layers

Customer by Size



Implementation Method¹



Average Time to Go Live (Months)

ı 12

14.6

75%

Average Contract Term (Months)

Estimated Payback (Months)
Sales Performance Management

SalesLoft

SalesLoft

Atlanta, GA

501-1,000 employees

SalesLoft is a sales engagement platform that helps teams set and execute a cadence of communications to convert target accounts into customer accounts. With real-time email tracking and integrated sales dialer and social communications, sales leaders can be confident their reps are executing effective selling processes for their organization.

www.salesloft.com | Twitter: @salesloft



SalesLof * - = ? 호 . C Day 1 Step 1 A - Phone Call /w VM instructions Call Script .ry Seinfeld Sorted by Timezon 770-756-8026 Ca Jerry Seinfeld unt Manager at SalesLol Profile 1 SalesLoft 🔿 Skip S DETAILS ACTIVITY Stephen Gladney Account Executive at SalesLo Cadence Stage Send Em... Disgualified L1 20 00 00 Lead Source Kelly Hamilton

SalesLoft (Prospector

Campaign Tag Contac

770-756-8026 Call

Pricing Model

 SalesLoft has not provided pricing information for this product or service. Contact SalesLoft to obtain current pricing

Reasons To Buy

- Offers automatic logging of activities (calls, emails, notes, LinkedIn Sales Navigator) to CRM
- Cadence function enables user to set up a sequence of events (e.g, email a prospect, then follow on LinkedIn, then call them, then email, etc.)

Reasons To Pass

Filter Timeline 👻

Next Steps

 Lacks integration with calendars to book meetings directly through the platform

00 00 00 00

10 20 00 0Z 0J

Allen English

Analytics are basic

Customer by Size



Implementation Method¹



Average Time to Go Live (Months)

1.2

12.1

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 11.7 81%

Sales Performance Management

Mindtickle

Mindtickle

San Francisco, CA 501-1,000 employees

Mindtickle provides a comprehensive, data-driven solution for sales readiness and enablement that fuels revenue growth and brand value for dozens of Fortune 500 and Global 2000 companies. Mindtickle enables company leaders and sellers to continually assess, diagnose and develop the knowledge, skills, and behaviors required to effectively engage customers and drive growth.

www.mindtickle.com | Twitter: @mindtickle





Pricing Model

Company Overview 🥡

 Mindtickle has not provided pricing information for this product or service. Contact Mindtickle to obtain current pricing

Reasons To Buy

- Very user friendly with seamless navigation of the product
- Responsive and helpful customer care
- Mobile-friendly

Reasons To Pass

 There is room for improvement regarding their data reporting and analytics

Customer by Size



Implementation Method¹



Average Time to Go Live (Months)

1.2

12.1

17.3

74%

109

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

Complement to 100% includes those

respondents that have not disclosed a breakdown

Sales Performance Management

monday.com

monday.com

Tel Aviv, Israel

1,0001-5000 employees

monday sales CRM lets you control your entire sales funnel and close deals faster by automating manual work and streamlining sales activities from A-Z.

https://monday.com | Twitter: @mondaydotcom



Deals						•••	
I Main table T Kanban	Forecast	+	à	Integrate 😋 🗖 🔮 +2	Automate / 10	\odot	
Pipeline	Owner	Contacts	Stage	Close probability	Est. deal	0	
Twister Sports		Madison Doyle	Qualified	80%	\$7,500		
Ridge Software	۵	Phoenix Levy	Proposal	60%	\$10,000		
Bluemart	0	Leilani Krause	Þ	Ga	in real-ti	me insights to mo	ake
Yelloworks	٩	Amanda Smith	P			-	
Closed won	Owner	Contacts					
Sheleg Industries	1	Jamal Ayers	S	ales dashbo	ard		
Zift Records	۵	Elian Warren					
Waissman Gallery	0	Sam Spillberg					
SFF Cruise	٩	Hannah Gluck		Forecasted revenue		Actual revenue	
				00110	00	+	
				\$211,8	00	\$69,700	

decisions

Won
 Negotiation

Proposal

vs. quota by tear

Standard: \$14 per month

Reasons To Pass

features

Basic and limited functionality of

Automations need updates

Pro: \$24 per month

Pricing Model

Individual: \$0 per month Basic: \$10 per month

Reasons To Buy

- integrates with most sales apps and tools
- gives sales teams full control over their sales pipeline, allows them to manage contacts and accounts
- streamlines post-sales processes and sales enablement

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.5

12

14.5

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 73%

¹ Complement to 100% includes those respondents that have not disclosed a breakdown

SALES PERFORMANCE MANAGEMENT

Scratchpad

Scratchpad

San Francisco, CA

51-200 employees

Scratchpad is fast. Beautifully simple. And comes with thoughtful design and advanced features that make the tedious work you currently do fade into the background.

www.scratchpad.com | Twitter: @Scratchpad



eview 🛓 Share 🖽 Fields 🍸 Filter 🖾 Group 📣	Highlight 1=								
Opportunity Name Amo		Stage ~	Next Step		Business Case/Me				
Happy Hotels - Pilot \$15,0	00 Feb 18, 2020	Qualification	Create pilot proposal.						
Catfish Consulting - Enterprise \$15,0	00 Nev 27, 2020	Qualification	Book meeting with Carl.		need to save more				
Electric Avenue - Division 2 \$700,0	00 Nov 27, 2020	Needs Analysis	Call with Susan, the VP Reve discuss Tiles for better collab		More data in MEDI				
Copper Construction - New Business \$40,0	00 Oct 30, 2020	Needs Analysis	The CS team wants licenses schedule meeting with Pat.	as well. Be sure to	Build more buildin-				
Lovely Logistics - Renewal \$80,0	00 Feb 21, 2020	Value Propo Hol	me Notes Tasks Pipeline				C Search		Nev
Elephant Electronics - Expansion \$35,0 Brilliant Biotech - Expansion III \$40,0			MY NOTES IF + D Misc Notes	A-D / Copper Cor	struction & Co	pper Construction - New Business Share	Copper Constr Business Opportunity	uction - New	0
Britan Bouch - Expansion in Britan	001 00, 2020	IC. DOCISION	A-D Copper Construction	Conne	er Constru	otion			
Edge Emergency Generator \$75,0	00 Oct 30, 2020	Id. Decision	Electric Energy	Cobbe	Constru	iction	Overview	Forecast	
			 Disco - Direct emp+ E-M 	Pre-call researc			Closed / Won Create Task	New Contact Sales Notes	
Happy Hotels - New Business \$250,0		Id. Decision	▶ N-Z	 Know who you are talking to and identify a couple of talking points about the people and company 		Next & Why	MEDDIC		
Calculate V Sun \$5,725,0	Calculate ~		Daily Distractions				Stage update	Activity History	
vite 🖉 👘 👘		the state	Get Started with Scratchpad Templates		nutes building rapport -call research on the per		Create Activity	+	
				Questions			MEDDIC		٥
			Trash 🗑		agree to this call?				~
				· How are you	solving the challenge t	oday?	Opportunity Name		
					r ideal go live date?		 Copper Construct 	tion - New Business	
				 How are put 	chasing decisions made	22	Business Case/Me		
				Next steps			Build more buildin	G2	
20		e e			e next call or meeting (if		Decision Criteria		
				 Include the 	key people from the targ	get company	Are more building	s built	
				Summary			Decision Process		
			+ New Note	 Why is this is 	a potential opportunity of	or why is this not qualified?	Need ops approve	al then CEO approval	
the state of the s		*	Wah Inite			等于"新兴"的""是"。""		SCRA	-

Individual: \$0 per month

> 🗄 Deal F

- Team: \$39 for 1user per month.
- Business: Contact sales at Scratchpad for pricing details

Reasons To Buy

- Simple, intuitive design that is easy to comprehend
- Saves sellers a lot of time and increases the accuracy of a CRM

Reasons To Pass

- Limited integration capabilities
- Limited reporting capabilities

Customer by Size



Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

7.5

63%



Learn

Sales Analytics

Tools that build on top of CRM data to reveal sales insights (e.g., performance of salespeople, products, communications etc.) and forecast future performance.

HUBSPOT SALES HUB	114
Salesforce	115
Gong	116
Clari	117
Groove	118

Additional products included in the category are: ActiveCampaign, Zoominfo, Constance Contact, Salesken, People.ai



Observations on Sales Analytics and Criteria for Inclusion

Sales analytics products access data solely from sales tools, and their core functionality is to analyze sales information. Some companies opt to use business intelligence platforms and self-service business intelligence software instead, which can also provide companies insight into their data from a variety of other sources in addition to sales data.

To qualify for inclusion in the Sales Analytics category, a product must:

- Automate and visualize sales pipelines with customizable stages, risk factors, and scoring methods
- Report on the performance of salespeople, products, methods, and other available data
- Forecast sales numbers based on pipeline factors

SALES ANALYTICS

HubSpot Sales Hub

HubSpot

Cambridge, Massachusetts

5,001-10,000 employees

Sales Hub is a powerful and easy-to-use sales CRM that includes sales engagement tools, configure-pricequote (CPQ) functionality, and robust sales analytics for growing teams.

www.hubspot.com | Twitter: @hubspot

Overall Satisfaction Ease of Use 95% 91% Ease of Setup Quality of Support 89% 90% VISIT G2 WEBSITE

<complex-block>

- Free HubSpot CRM: \$0
- Sales Hub Starter: \$50 per month (2 paid users)

Reasons To Buy

- Mobile app is well designed
- Offers possibility of multi-step prospecting sequence
- It is possible to receive direct support from Hubspot through the "chat support" feature

 Sales Hub Professional: \$500 per month (5 paid users)

13

 Sales Hub Enterprise: \$1200 per month (10 paid users)

Reasons To Pass

- Lacks integration with Microsoft Teams
- Does not have extensive reporting to drill-down data for several layers

Customer by Size



Implementation Method¹



Average Time to

1.2

9.7

12.2

Average Contract Term (Months)

Go Live (Months)

Estimated Payback (Months)

Average User Adoption 77%

Salesforce CRM

Salesforce

San Francisco, CA

50,001+ employees

VISIT G2 WEBSITE

Salesforce helps businesses of all sizes accelerate sales, automate tasks, and make smarter decisions through: Lead and Contact Management; Sales Opportunity Management; Workflow Rules and Automation; Customizable Reports and Dashboards; Mobile Application.

www.salesforce.com | Twitter: @salesforce

Overall SatisfactionEase of Use97%79%Ease of SetupQuality of Support79%72%

Pricing Model

Sales Essentials Edition: \$25 per user per month Professional Edition: \$75 per user per month

Reasons To Buy

Provides integrations with sales enablement and marketing tools

Offers connection of leads, opportunities, contacts to keep track of completed and incomplete activities

Offers high level of customization for tailor-made solutions

Enterprise Edition: \$150 per user per month Unlimited Edition: \$300 per user per month

Reasons To Pass

Longer average time to go live than competitors Lack of mobile user support

Customer by Size



Implementation Method¹



Services Team Consultant

Average Time to Go Live (Months) 3.6

12

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption 15.4 72%

Complement to 100% includes those respondents that have not disclosed a breakdown

Sales Coaching

Gong

Gong San Mateo, CA 1001- 5001 employees

Gong.io enables revenue teams to realize their fullest potential by unveiling customer reality. The patented Gong Revenue Intelligence Platform captures and understands every customer interaction and then delivers insights at scale, empowering revenue teams to make decisions based on data instead of opinions. <u>www.gong.io</u> | Twitter: @Gong_io





Pricing Model

Gong has not provided pricing information for this product or service. Contact Gong to obtain current pricing

Reasons To Buy

Keyword search provides significant insights Integrates with Zoom Offers granular analytics (e.g., avg. pause length, word choice) Can playback the speed of the call (e.g., 1.25 or 1.5 speed)

Reasons To Pass

Call recordings are not available in real time Transcriptions on calls are not always 100% accurate

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 0.8

7.5

10.9

79%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

SALES ANALYTICS

Clari

Clari

Sunnyvale, CA 201-500 employees

Clari helps revenue teams streamline operations, improve predictability, and increase efficiency by using AI and automation to create full funnel accountability across the entire revenue operation. Clari harvests and analyzes activity signals from different business systems to enable revenue operation to be more connected, efficient, and predictable.

www.clari.com | Twitter: @clarihq





Reasons To Pass

"young" software

It has frequent maintenance

windows, quite typical for a

Pricing Model

 Clari has not provided pricing information. Contact Clari to obtain current pricing

Reasons To Buy

- Trend and Pulse modules are accurate in predicting figures
- Integrations into other tools (e.g. Gmail, Salesforce) give visibility on which accounts are trending in the right direction
- Import to excel function is a value added

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 2.2

20.0

11.2

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

Sales Intelligence

Groove

Groove

San Francisco, CA 51-200 employees

Groove is a sales engagement platform that automates non-sales activities so that sales teams can spend more time building relationships and generating revenue. Groove eliminates the need for CRM data entry and provides managers with real-time visibility into activity levels and performance, regardless of location.

www.groove.co | Twitter: @groove_co





COMPASS

Pricing Model

Google

Groove has not provided pricing information for this product or service. Contact Groove to obtain current pricing

Reasons To Pass

room for improvement

Lacks support for mobile app

The integrated dialer presents

Reasons To Buy

Offers the industry's only native Salesforce integration, which reduces administrative overhead by as much as 90%

Creates reports in Salesforce to visualize productivity

Calendar scheduler is integrated within outgoing emails

Customer by Size



Implementation Method¹



Average Time to Go Live (Months) 1.0 9.1

15

68%

Average Contract Term (Months)

Estimated Payback (Months)

Average User Adoption

Acknowledgements and Thank You

AUTHORS:

- Michael Brown Founder and Managing Partner at Bowery Capital
- Ellen Terlizzi- Director of Growth at Bowery Capital

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