

The Forrester Wave™: Sales Engagement, Q3 2020

The Sales Engagement Vendors That Matter Most And How They Stack Up

by Mary Shea
September 9, 2020

Why Read This Report

In our 31-criterion evaluation of sales engagement vendors, we identified the eight most significant ones — Cirrus Insight, Groove, Marchex, Outreach, Salesforce, SalesLoft, VanillaSoft, and XANT— and researched, analyzed, and scored them. This report shows how each vendor measures up and helps sales leaders select the right one for their needs.

Key Takeaways

Outreach And SalesLoft Lead The Pack

Forrester's research uncovered a market in which Outreach and SalesLoft are Leaders; XANT, Groove, and Salesforce are Strong Performers; and Marchex, VanillaSoft, and Cirrus Insight are Contenders.

Functionality And Workflows, Industry Expertise, And Vision Are Key Differentiators

The digitization of the buying and selling process underway for some time has dramatically accelerated because of COVID-19 hardships. B2B sales leaders need sales engagement vendors that can deliver functionality and workflows to enable full revenue teams, provide industry-specific expertise, and have a vision and plan for how AI will elevate all users. Vendors that bring these capabilities together position themselves to successfully equip their customers in the new selling landscape.

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Related Research Documents

- [Building The Business Case For A Modern Sales Enablement Toolset](#)
- [The Democratization Of B2B Sales](#)
- [Now Tech: Sales Enablement Automation, Q2 2020](#)



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Sales Engagement Is Poised To Meet The Moment

2020 will be remembered as a watershed moment when B2B buying and selling changed forever. While the digitization of the buying and selling process has been underway for some time, the hardships from COVID-19 have dramatically accelerated this trend. With 53% of white-collar workers planning to work from home for the foreseeable future, sales engagement (SE) and adjacent sales technology categories are in the right place at the right time.¹ In the past 16 months, SE vendors raised more than \$250 million in venture investment with \$62 million of that raised in 2020.² Forty-one percent of B2B companies recently surveyed have reduced sales headcount, and 10% reinvested the cost savings into sales technologies to drive better efficiencies and effectiveness.³ Over one-third of the reference customers surveyed for this evaluation stated they planned to increase licenses with their SE vendor.⁴

As a result of these trends, SE customers should look for vendors that:

- › **Have functionality that enables entire revenue teams.** The SE category has been primarily associated with early-cycle reps and high-velocity selling scenarios, but the use cases are expanding rapidly. As entire revenue teams WFH, vendors with functionality, workflows, and UIs that can be tailored for early-cycle, mid-to-later-cycle, post-sale, and full-cycle reps have a distinct advantage.
- › **Have industry-specific expertise and functionality.** Technology companies have been at the tip of the spear in adoption of SE. But as sales digital transformation rapidly expands to financial services, logistics, government, and other more traditional industries, vendors that understand the nuances of a range of industries and have industry-specific functionality such as predefined cadences, data models, and UI labels are well positioned.
- › **Have a vision and plan for how AI will elevate its users.** As sales teams decrease in size, reps will need assistance from technology to become nimbler and take on more responsibility. Whether its surfacing *in-the-moment* product information based on buyer prompts or identifying a missing contact who will influence the buying decision, SE vendors that have a clear plan to enhance rep capabilities through AI-embedded functionality will set themselves apart.

Evaluation Summary

This Forrester Wave™ evaluation highlights Leaders, Strong Performers, and Contenders. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our report "[Now Tech: Sales Enablement Automation, Q2 2020.](#)"

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 1 Forrester Wave™: Sales Engagement, Q3 2020

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Sales Engagement

Q3 2020



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FIGURE 2 Forrester Wave™: Sales Engagement Scorecard, Q3 2020

	Forrester's weighting	Cirrus Insight	Groove	Marchex	Outreach	Salesforce	SalesLoft	VanillaSoft	XANT
Current offering	50%	2.04	3.67	2.44	4.20	2.83	3.23	1.67	3.20
Integrations	14%	1.00	2.30	1.80	3.00	3.50	4.40	2.30	3.50
Content — templates	14%	3.00	3.00	3.00	5.00	3.00	1.00	3.00	3.00
Automation	14%	1.30	4.40	3.30	3.00	3.30	3.60	1.80	4.70
Artificial intelligence	14%	2.00	3.00	2.00	3.40	3.00	2.60	1.60	4.20
Service and support	14%	3.00	5.00	3.00	5.00	3.00	5.00	1.00	3.00
Security, privacy, and compliance	14%	1.00	3.00	3.00	5.00	3.00	3.00	1.00	3.00
User experience — interface	14%	3.00	5.00	1.00	5.00	1.00	3.00	1.00	1.00
Strategy	50%	1.60	2.90	2.60	3.70	3.30	4.60	3.00	3.50
Category vision	25%	1.00	3.00	3.00	3.00	1.00	5.00	3.00	5.00
Partner and customer ecosystem	20%	3.00	1.00	1.00	5.00	5.00	5.00	3.00	3.00
Execution roadmap	15%	1.00	5.00	3.00	5.00	3.00	5.00	3.00	3.00
Market differentiation	10%	1.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Customer performance	20%	1.00	3.00	3.00	3.00	5.00	5.00	3.00	3.00
Market segmentation	10%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Market presence	0%	2.20	3.20	2.80	4.00	3.00	4.40	1.60	3.60
Revenue	20%	1.00	2.00	4.00	5.00	2.00	5.00	1.00	3.00
Client base	20%	2.00	3.00	3.00	5.00	2.00	4.00	1.00	2.00
Global	20%	3.00	5.00	1.00	3.00	5.00	5.00	2.00	5.00
Average deal size	20%	4.00	3.00	3.00	3.00	3.00	3.00	2.00	5.00
Growth	20%	1.00	3.00	3.00	4.00	3.00	5.00	2.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Vendor Offerings

Forrester included eight vendors in this assessment: Cirrus Insight, Groove, Marchex, Outreach, Salesforce, SalesLoft, VanillaSoft, and XANT (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated
Cirrus Insight	Cirrus Insight
Groove	Groove
Marchex	Marchex Sales Edge, Marchex Sonar
Outreach	Outreach
Salesforce	High Velocity Sales (HVS)
SalesLoft	SalesLoft Cadence, SalesLoft Conversations, SalesLoft Deals
VanillaSoft	VanillaSoft
XANT	Playbooks

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **Outreach outpaces others with product innovation and an intuitive platform.** With engineering and product talent acquired from top-tier West Coast technology companies, Outreach maintains an impressive network of more than 1,000 partners and reinvests 40% of its revenues in R&D to advance platform capabilities. For example, Kaia, a new product in beta with select customers, leverages AI to surface *in-the-moment* information to sellers based on buyer prompts. Digital flashcards visible only to the seller provide real-time details relevant to the conversation or address buyer-posed questions. One reference customer described the vendor's current functionality as having "transformed the way we do business and something we could not go without."

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Outreach recently closed a \$50 million Series F round and received a \$1.3 billion valuation, making it the only unicorn among those evaluated. Today, most of its customers are midmarket technology companies with users who are early-stage and mid-stage reps based in North America, but its February 2020 London office opening will expand its European presence. Reference customers praise the platform's intuitiveness and ability to support self-service. Admins and sales managers can create sequences with minimal technical expertise and training. Some reference customers surmised the vendor was experiencing growing pains with regard to its global governance features. The vendor is investing heavily in product development and extending partnerships to increase its appeal to larger enterprises. Outreach is a strong fit for organizations that value innovation and category leadership and that want to align with a technology partner with big aspirations.

- › **SalesLoft leads with comprehensive capabilities and exemplary service.** With its native functionality and broad partner ecosystem, SalesLoft has expansive capabilities and exemplary service. The platform helps revenue teams elevate their interactions with buyers across the entire lifecycle. Native and third-party conversation intelligence functionality automatically records and transcribes calls, creating artifacts that help coach and upskill team members; A/B testing helps identify optimal messaging and formats; and Hot Leads prioritizes buyers and recommends the best times to engage. While SalesLoft's capabilities support full-cycle activities, today most of its customers leverage the platform for early-stage and mid-stage reps.

While the bulk of SalesLoft's customers are North American-based midmarket technology companies, the vendor opened its London office to fuel European expansion. All reference customers stated they were extremely satisfied with SalesLoft and praised the vendor for its intuitive platform, quick implementations, and ease of use. One customer shared that even after two years, it still meets biweekly with its customer success managers "to learn more about its use cases and to get more out of the tool." Reference customers would like SalesLoft to increase its reporting and analytics capabilities and to accelerate its innovation cycles. SalesLoft well suits B2B companies of various shapes and sizes that want to put in place a comprehensive best-of-breed engagement tool.

Strong Performers

- › **XANT differentiates with aggregate customer data and buyer intelligence.** In 2019, InsideSales.com rebranded to XANT. The vendor's primary differentiator is its ability to combine and anonymize all customer data to provide insights and intelligence on buyers' behavior and preferences. By tapping into the outcome data of the collective, Playbooks builds behavioral profiles to help reps better understand their buyers' engagement and other preferences before even the first interaction. Its platform tracks and links contacts to deal outcomes to inform sellers when they are working with repeat buyers and can recommend additional buying team influencers.

With investments from both Salesforce and Microsoft, XANT takes a CRM and industry-agnostic go-to-market approach. Content to let others pursue small and medium-size businesses (SMBs), the vendor targets enterprise customers. XANT serves early-cycle reps, account executives,

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and customer success reps with accountabilities for case and renewal management. Reference customers like the platform's ability to recommend the best cadences to follow and modalities to use but want better guided selling capabilities and industry-specific functionality. XANT is an ideal fit for enterprise companies that want to help sellers better execute on buyer-centric sales strategies and that favor access to aggregate customer data more than industry-specific customization.

- › **Groove bets on engagement as the future workspace for sellers.** Founded by ex-Google executives, Groove is a platform in use in 56 countries and designed to meet the requirements of large, complex global organizations. Groove's leadership believes that within five years, every enterprise with CRM will have an engagement layer from which sellers will conduct their daily tasks. The vendor aspires to be that layer for Salesforce's enterprise customers. Its architecture eliminates data latency and sync errors and supports customized workflows. The platform is designed for full-cycle reps and has a UI that can adapt to role, division, team, and other unique requirements.

Groove's 92% renewal rate is among the highest in the industry, and its average of 88 licenses per customer account is nearly three times that of category leaders. In May 2020, Groove announced its first round of institutional funding — a \$12 million Series A investment with an undisclosed valuation. While reference customers like Groove's ability to accommodate the complexities of their business, they want more from their partner including thought leadership, best practices, and AI-generated recommendations for different classes of users. In order to effectively compete with the pace of the market and more highly capitalized players, Groove must accelerate the buildout of its partner ecosystem, prioritize partnerships with foundational enablement vendors, and evolve its thinking around how AI can empower enterprise sellers. Groove is an ideal fit for global companies that want platform customization and a high-touch customer experience.

- › **Salesforce differentiates with easy-to-extend access to its Marketing and Sales Cloud.** Neither CRM-independent nor CRM-agnostic, High Velocity Sales (HVS) is native to only the Salesforce platform. HVS's broad options complement and integrate with Salesforce's own and other major marketing and sales tools including marketing automation, account-based marketing, sales content, and sales readiness platforms — many of which are part of its AppExchange. Salesforce Einstein Call Coaching provides native conversation intelligence (CI) functionality and HVS integrates with all the other key CI players.

Customers benefit from inclusion in the Salesforce ecosystem and all that entails, from its global reach and world-class events to greater data integrity. By leveraging the Salesforce ecosystem, there are minimal syncs and integrations — areas where accidental data corruption and/or duplication can occur. Collaborative selling teams work from the same data pool, facilitating a 360-degree view of buyer interactions across all channels. Although Salesforce shared customer case studies, the vendor declined to make reference customers available due to the pandemic.⁵ HVS is a strong fit for companies that have invested in Salesforce's CRM and want to gain more value from that investment.

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Contenders

- › **Marchex powers buyer-centric B2C and B2B sales motions.** With customers across a range of traditional services and manufacturing industries, CI is native and core to the Marchex platform. This functionality captures insights from every recorded call, automates sales conversion reporting, and allows sales managers to set up automatic text and email alerts to rescue or reassign missed opportunities. The platform is both CRM-agnostic and -independent and integrates with popular email, calendar, chat, and video applications. The Marchex Sonar intelligent mobile messaging solution has native integration with Calendly, which makes it quick and easy for buyers to schedule meetings with sellers over text and to track meeting conversion.

As a public company in existence for more than 15 years, Marchex is well capitalized and is in a good position to invest in organic and inorganic product innovation. Today, the vendor works exclusively with North American-headquartered companies. While the vendor brings deep automotive consultative expertise to the table — it has nine of the 15 OEMs and 21 of the 34 brands in the US as its customers — the platform lacks the breadth and depth of some table-stakes features present in other vendors. Marchex's reference customers view the vendor as a strategic partner that is in tune with their needs but would like to see the vendor enhance its sales training and coaching capabilities. Marchex is a natural fit for any automotive or automotive value chain business, companies in the home services industries, and those in other traditional industries.

- › **VanillaSoft delivers core capabilities to traditional businesses.** With its hyperfocus on traditional industries and SMB companies, VanillaSoft purposely crafts its go-to-market partner and product strategies around the unique needs of its target customers. The platform has a native semiautomatic dialing system and can automatically leave voicemails and send texts, emails, and calendar invites. Meeting invites can be sent directly from its templates, and remote meeting applications can be launched directly from the platform.

VanillaSoft has grown modestly over the past 15 years. In 2019, the vendor received a \$4 million cash infusion from Canada Economic Development for Quebec Regions and Fonds Régional de Solidarité Outaouais to add R&D and sales personnel and support its North American expansion. VanillaSoft's commercial relationships are evenly divided into three primary verticals — insurance, higher education, and high tech. Full-cycle reps use just fewer than half of the vendor's licenses. Some reference customers indicated they would have benefited from more pre- and post-rollout assistance, while others praised the vendor for listening to and acting on customer product feedback. VanillaSoft is a good fit for businesses with a transactional, high-velocity sales model that want to arm their sellers with a cost-effective engagement tool.

- › **Cirrus Insight fulfills basic engagement and content needs for smaller businesses.** Native to Salesforce, the Cirrus Insight platform allows reps to work directly from their email inbox. Inbound and outbound emails, calendar invitations, custom objects, and standard records all automatically sync to the Salesforce CRM, which helps customers maintain higher-quality process and engagement data. The platform also has native content functionality including templates, collateral

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creation, approvals, and content engagement tracking. It automatically captures buyer interaction data from emails, meetings, phone calls, and tasks. It has reporting and analytics that allow management to glean some content performance insights with buyers across multiple channels.

The vendor is very effective at turning its tech/telco, financial services, and higher-education customers into advocates, which shows in it being the second most highly rated app on Salesforce AppExchange. While these SMB customers benefit from access to engagement and content capabilities from a single platform, some basic functionality is lacking. The platform doesn't offer automatic out-of-office stops and restarts. And there is no data capture from chat, social, or messaging interactions and no ability for reps to record live meetings. Reference customers stated that the platform is easy to install, use, and sync with their CRM but cited reporting and analytics as an area where the vendor could improve. With many of its customers based in North America and some in Europe, Cirrus Insight is a good fit for SMB customers that prefer two-for-one value in engagement and content over wide and deep capabilities in each.

Evaluation Overview

We evaluated vendors against 31 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include CRM, email/calendaring, chat/social/video, dialers, data augmentation, marketing platforms, sales enablement automation, CI, content templates, repetitive tasks, workflows, activity capture, interaction management, recommendations, guided selling, workflow steps, service, support, security, privacy, compliance, and user experience interfaces.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated category vision, partner and customer ecosystems, execution roadmaps, market differentiation, customer performance, and market segmentation.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue, client base, global presence, average deal size, and growth.

Vendor Inclusion Criteria

Forrester included eight vendors in the assessment: Cirrus Insight, Groove, Marchex, Outreach, Salesforce, SalesLoft, VanillaSoft, and XANT. Each of these vendors:

- › **Has functionality that automates repetitive manual tasks.** We included vendors with core functionality that creates efficiencies by helping revenue teams automate their omnichannel touchpoints.
- › **Derives at least 40% of its annual revenues from companies that sell to businesses.** We included vendors with fewer than half of their customers focused on selling to businesses.

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- › **Has significant interest from Forrester customers.** Forrester considered the level of interest and feedback from our clients based on our various interactions, including inquiries, advisories, and consulting engagements.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

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The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by June 25, 2020, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Survey Methodology

Forrester's Q2 2020 B2B Channel And Sales Survey was fielded to direct and indirect sales professionals from June 15 to July 20, 2020. For quality assurance, panelists are required to provide contact information and answer questions regarding their ability to provide information on their company routes and go-to-market strategy. Respondent incentives included a summary of the survey results as well as a courtesy copy of a published Forrester report. Exact sample sizes are provided in this report on a question-by-question basis. Panels are not guaranteed to be representative of the population. Unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes.

The Q3 2020 Sales Engagement Forrester Wave™ Customer Reference Survey was conducted in July 2020 for this report. Respondent incentives included a summary of the survey results as well as a courtesy copy of a published Forrester report.

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Endnotes

¹ Base: 338 US individuals who can work from home and indicated that the question applies to them. Source: Forrester's Q2 2020 US PandemicEX Survey 2 (April 29 to May 1, 2020).

See the Forrester report "[The Democratization Of B2B Sales.](#)"

² Source: Venture Scanner (<https://www.venturescanner.com/>).

³ Base: 91 sales professionals who answered during COVID-19. Source: Forrester's Q2 2020 B2B Channel And Sales Survey.

Base: 83 sales professionals who answered during COVID-19. Source: Forrester's Q2 2020 B2B Channel And Sales Survey.

⁴ Source: Forrester's Q3 2020 Sales Engagement Forrester Wave™ Customer Reference Survey.

⁵ This research was conducted during the COVID-19 pandemic. In keeping with Salesforce's company policy during this time, the vendor wanted to be respectful of its customers' need to focus on their businesses and families. As such, Salesforce chose not to make reference customers available to Forrester in support of this evaluation.

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