The Forrester Wave™: Sales Enablement Automation Systems, Q4 2016

The Nine Providers That Matter Most And How They Stack Up

by Steven Wright and Jacob Milender
December 6, 2016

Why Read This Report

In our 33-criteria evaluation of sales enablement automation (SEA) systems providers, we identified the nine most significant ones — Brainshark, CallidusCloud, ClearSlide, KnowledgeTree, Mediafly, Savo, Seismic, Showpad, and Skura — and researched, analyzed, and scored them. This report shows how each provider measures up and helps business-to-business (B2B) marketing professionals make the right choice.

Key Takeaways

Seismic And ClearSlide Lead The Pack
Forrester's research uncovered a market in which ClearSlide and Seismic lead the pack. Brainshark, CallidusCloud, KnowledgeTree, Mediafly, Savo, and Showpad offer competitive options. Skura lags behind.

B2B Marketing Pros Are Looking For Seller Efficiency And Effectiveness
The SEA systems market is growing because more B2B marketing professionals see sales enablement as a key way to address their top challenges. This market growth is in large part due to the fact that B2B marketing pros increasingly trust SEA systems providers to act as strategic partners in managing seller-focused content and measuring sellers' and buyers' engagement.

CRM Integration And Prescriptive Recommendations Are Key Differentiators
As legacy technology becomes outdated and less effective, improved sales enablement solutions will dictate which providers will lead the pack. Vendors that can provide superior content management, CRM integration, and opportunity-based recommendations with related analytics position themselves to successfully deliver more targeted and effective opportunities at all sales stages to their customers.

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The Nine Providers That Matter Most And How They Stack Up

by Steven Wright and Jacob Milender
with Peter O'Neill and Kara Hartig
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Notes & Resources

Forrester conducted product evaluations in August and September 2016 and interviewed nine vendors — Brainshark, CallidusCloud, ClearSlide, KnowledgeTree, Mediafly, Savo, Seismic, Showpad, and Skura — and 18 user companies that the vendors provided.

Related Research Documents

Brief: Five Keys To Sales Enablement Automation Success

Brief: Six Sales Enablement Automation FAQs — And Three More That Should Be On Your List

Vendor Landscape: Sales Enablement Automation

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Enabling Sellers Of Complex Solutions Challenges B2B Marketers

In the past decade, B2B marketers have struggled to help sellers find and use content, especially digital content. Also, lack of visibility into sellers' content usage or buyers' engagement with it means that B2B marketers cannot help sellers improve or understand the level of their content's effectiveness in winning, serving, and retaining customers. Sales enablement has been around as a concept since the 1990s, and Forrester defines SEA as a software category with a set of content administration and reporting functions that support Forrester's sales enablement execution goals through (see Figure 1):[1]

› **Content management.** This is a centralized function to control, manage, publish, and access content. It makes content available from a main portal or from the CRM system in many forms and types including both externally and internally facing content. This also allows sellers to assemble and customize content within limits that the SEA solution controls.

› **Prescriptive recommendations.** SEA can actively recommend the right content at the right time to sellers by reviewing their active opportunities and tagging and mapping content to CRM fields such as the sales stage, industry, buyer's role, solution, and usage. Recommendations include links to related training material.

› **Engagement analytics.** To one degree or another, depending on the solution, SEA measures how buyers consume digital content in terms of opens and forwards. Another metric is the time that they spend on a slide during a live presentation.

› **Usage reporting.** For B2B marketers, understanding how, when, and with whom content gets consumed forms a basis for future content creation.

› **A seller-oriented user experience.** Most solutions integrate well with CRM, appearing as tabs or with recommendations within an opportunity. Many also allow content access from email. Most vendors automatically enter engagement information into the CRM, sparing sellers the administrative burden. All also offer a portal where sellers can search for and assemble content from the solution.

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FIGURE 1 Forrester's Sales Enablement Execution Goals Define Sales Enablement Expectations

Execution goal	Description
Develop	Ensure that sellers have the appropriate skills and attributes to engage in effective conversations to progress, negotiate, and close on a solution that maps to buyers' needs. This requires knowledge transfer processes and ongoing behavioral guidance.
Position	Deliver content that consistently represents the brand's promise and can be customized to address the specific needs of the buyer.
Align	Give sellers relevant and actionable information about the buyers whom they meet and the businesses that they are helping succeed.
Locate	Enable quickly locating or recommending appropriate content that aligns with the buyer's journey and upcoming conversations.
Engage	Support content sharing or distribution platforms that demonstrate innovation, are compatible with modern buyers' expectations of how to consume content, and share and support the capture of data about these interactions to feed back into improving execution of all sales enablement goals.
Assemble	Equip sellers with the ability to quickly configure, price, and quote value-based proposals that closely tie to customers' situation as well as build RFIs and RFPs.

Sales Enablement Solutions Start To Converge

Even though some vendors in the space were active as early as the 1990s, only in the past four to five years have enough vendors entered market, built significant customer bases, and delivered competitive product functions for SEA to become a viable, but still emerging, market segment.[2] The SEA vendors share the aforementioned common set of functions but widely vary in how they execute those functions. These variations matter, and prospective customers should carefully match functions to their organizational needs:

› **Simple versus sophisticated administration by level of content and contributors.** The most important function of SEA content management is tagging content for recommendation to sellers by subject, product, suggested usage, sales opportunity, and other CRM-related fields. Some solutions allow contributors to use any terms as keywords for tagging, and for customers with hundreds or thousands of pieces of content, this could lead to confusion. Other solutions have wizard-based functions to define and control keywords as well as workflows for review and approvals. These are useful for users with many creators or contributors and a smaller group of administrators who manage editing, approvals, publication, and reporting.

› **Loose versus tight integration with CRM and email.** The highest level of CRM integration is when content recommendations appear in the CRM opportunity tab itself, but almost all solutions make their portal available as a tab within the CRM. While all support Salesforce CRM to one

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degree or another, integration with other CRM solutions varies, with Microsoft Dynamics being the most frequently named second CRM. It's a similar story for email: Some sellers spend most of their time working from email, and several solutions provide good email integration so that content can be recommended, selected, and sent from the email program. Microsoft Outlook has broad support, and a few solutions offer, or soon will, the same support for Gmail.

› **Attachment of single versus multiple pieces of content.** All solutions create links to microsites that show when recipients opened content and how long they spent on it. Some go further and allow sellers to create microportals that contain multiple pieces of content, allow personalization for the recipient, and incorporate branded templates. The same engagement functions are available. Some solutions also support guest books that track when content gets forwarded, and to whom, by requesting the name and email. Some can even support polling or survey questions.

› **Monolithic versus decomposed content for customization.** All solutions can link or import multipage presentations or PDFs as single pieces of content. Many can also decompose multipage email documents into separate content components by page. Usually, this applies the original tagging to the new separate components, but it may require additional tagging to reflect specifics on a page. This capability allows sellers to easily assemble content to better position and align it with buyers. It also gives marketers a window into how sellers are adapting content. Dynamic updating of the decomposed content if the original source is updated in a linked repository varies.

› **Basic links versus full integration with learning management systems.** Sales enablement automation is *not* onboarding, training, or sales development. It can work as a central point to link to training and education resources. Some vendors also offer robust learning management system (LMS) solutions that they sell separately. But since all can link to content in many repositories, linking to any LMS is easy. Also, determine how vendors support microtraining or just-in-time training for quick refreshers. Short how-to videos and support for quizzes and leaderboards can measure sellers' understanding and allow sales managers to target their coaching. Sellers can sometimes even record videos and voiceovers both for review and for distribution to customers (if it's allowed).

A Synchronous Versus An Asynchronous Bias Slightly Bifurcates The Market

All vendors support content management, a central portal, and some degree of CRM integration. But their bias toward live presenting versus email communications can be quite different depending on their original product design. Even as vendors converge their solutions, understanding this difference will help you choose a solution that best fits your sales culture and methodologies:

› **Synchronous actions support live or virtual presentations.** These include meeting tracking and analysis of time that's spent on slides or other content elements. They can also include functions to toggle between presentations on the fly, depending on how the conversation is going. Some even support building and using interactive tools, such as financial or pricing models and product feature selections, within presentations. Presentations can be online and offline on laptops and

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mobile devices, which are usually iPads but include other mobile devices including smartphones. ClearSlide, Mediafly, Showpad, and Skura fall into this camp. Brainshark also offers a separately priced live presentation tool that focuses on Salesforce and Salesforce1.

› **Asynchronous actions support email-focused communications.** These include seller actions for email distribution of single pieces of content or microportals and all related analytics such as opens, forwards, and time that's spent, which recommendations from content tagging usually support. They also include strong CRM and email integration, more complex conditional tagging, and workflows for reviews and approvals. Brainshark, CallidusCloud, KnowledgeTree, and Seismic have roots in email that supports high-volume content management and aim more at an asynchronous approach.

Understanding Some Other Factors May Affect Your Decision

The DNA of each vendor organization should factor into your selection criteria too. Some have founders with deep expertise in document management in regulated industries like finance such as Seismic. Others came from areas where accessing and presenting all forms of media was important such as Mediafly. Vendors may even have a strong vertical focus like life sciences such as Skura (see Figure 2). When looking at these vendors, consider these and other factors beyond solution function that can affect your selection criteria:

› **Availability in, and for, international markets.** Except for Showpad, with a base in Belgium, all vendors are very US-focused, but they all have US-based multinational clients. A few, such as CallidusCloud, have some offices outside of the US. Many are planning to expand their presence, with Europe being their first target. For companies outside of the US, look carefully at language support — for not only content but also portal and user administration portions of the solution.

› **Services to support your implementation.** The biggest challenge to sales enablement, to which almost every reference customer with whom we spoke for this report attests, is finding, organizing, naming, and tagging content. Most vendors offer valuable add-on services to assist in this task and provide excellent knowledge transfer on taxonomies and best practices for your content management.

› **Analytics within the SEA solution.** While all provide a good assortment of canned reports, you may require more sophisticated reporting that incorporates other sources of insight. Even though most users are not yet leveraging product-provided analytics to their fullest extent, a fair number are exporting data to other business intelligence solutions. All solutions also easily export data.

› **Suitability for ABM processes.** We asked each vendor if customers want information about account-based marketing (ABM). Everyone said, "Yes." But none has developed use cases or positioning around ABM. Part of this results from the nature of the sales process: Sellers tend to focus at the account level anyway. But Forrester anticipates that ABM-related functions such as content recommendations, distribution, and reporting will become important as ABM adoption increases.[3]

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FIGURE 2 SEA Systems Vendors Focus On A Diverse Array Of Vertical Industries
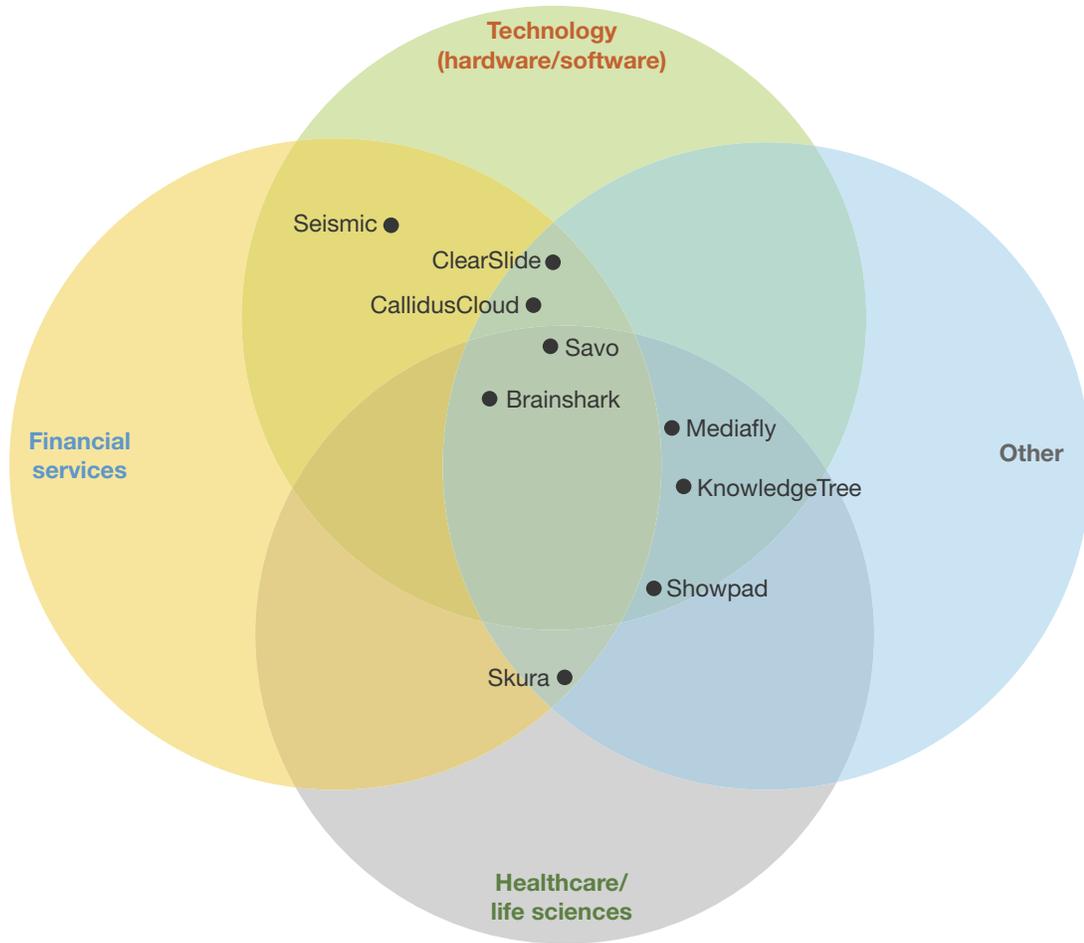
Sales Enablement Automation Systems Evaluation Overview

To assess the state of the SEA systems market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top SEA systems vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 33 criteria, which we grouped into three high-level buckets:

› **Current offering.** We looked at the depth of the vendors' product offerings and function for content management and prescriptive recommendations for content. We also evaluated their reporting on engagement and usage as well as the level of integration with other sales tools and the quality of the user experience for sellers, administrators, and content creators.

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› **Strategy.** We studied vendors' execution road map along with planned enhancements that supported it. We also looked at their market approach and vision as well as the products, services, and pricing structures that support both.

› **Market presence.** To score market presence, we analyzed the number of customers and number of new customers from 2014 to 2015 as well as revenue and revenue growth from 2014 to 2015.

Evaluated Vendors And Inclusion Criteria

Forrester included nine vendors in the assessment: Brainshark, CallidusCloud, ClearSlide, KnowledgeTree, Mediafly, Savo, Seismic, Showpad, and Skura. Each of these vendors has (see Figure 3):

› **A balanced solution that supports five sales enablement functional areas.** These areas include content management, engagement tracking, and an integrated user experience for creators and sellers. They also include prescriptive functions to recommend content and actions as well as reporting across all supported functions for marketers, sellers, and sales management for insights on usage, effectiveness, and engagement.

› **Competitive presence and marketplace awareness.** These include competitive mentions by other vendors and customers in questionnaires, by screeners from the Forrester report "Vendor Landscape: Sales Enablement Automation," as well as in customer inquiries.[4]

› **Customers across multiple industries.** Vendors focus on more than one vertical and can show B2B customers across industries such as financial services, life sciences, manufacturing, and technology.

› **Strong support for three to four of Forrester's sales enablement execution goals.** The six goals are develop, position, locate, align, engage, and assemble.

› **Significant growth in customers and revenue from 2014 to 2015.** This includes growth in the number of accounts, increased penetration in accounts, and overall strong growth in revenue.

› **Continued investment in product function.** This includes expansion of innovative and competitive function in solutions in the past 18 months.

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FIGURE 3 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated
Brainshark	Sales Accelerator	4.12
CallidusCloud	CallidusCloud Enablement	2016.3
ClearSlide	ClearSlide	
KnowledgeTree	KnowledgeTree Enterprise	
Mediafly	Mediafly	
Savo	Smarter Content and Smarter Engagement	
Seismic	Seismic	
Showpad	Showpad	
Skura	Skura SFX	4.6.1

Vendor inclusion criteria

| |
|---|
| It is a balanced solution that supports five sales enablement functional areas. |
| It has competitive presence and marketplace awareness. |
| It has customers across multiple industries. |
| It has strong support for three to four of Forrester's sales enablement execution goals. |
| It had significant growth in customers and revenue from 2014 to 2015. |
| It shows continued investment in product function. |

Vendor Profiles

This evaluation of the SEA systems market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave™ Excel-based vendor comparison tool (see Figure 4).

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FIGURE 4 Forrester Wave™: Sales Enablement Automation Systems, Q4 '16
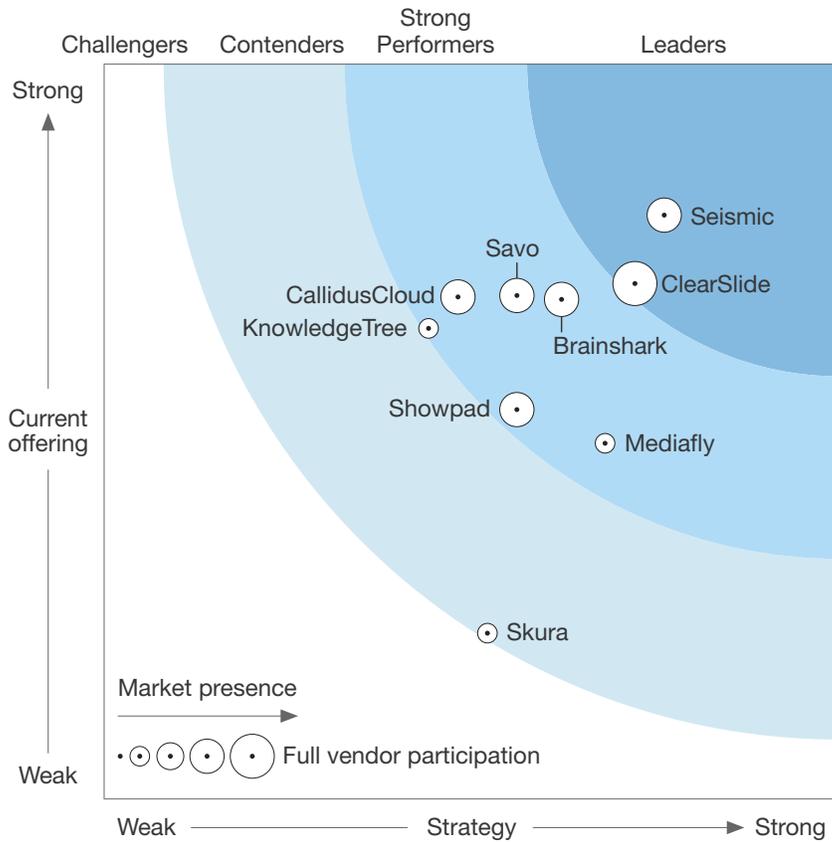
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FIGURE 4 Forrester Wave™: Sales Enablement Automation Systems, Q4 '16 (Cont.)

	Forrester's weighting	Brainshark	CallidusCloud	ClearSlide	KnowledgeTree	Mediafly	Savo	Seismic	Showpad	Skura
Current offering	50%	3.40	3.41	3.51	3.20	2.42	3.42	3.97	2.65	1.13
Content	20%	3.00	3.30	3.80	4.30	3.20	4.30	4.60	2.70	2.10
Prescriptive	20%	2.60	3.80	3.00	3.40	1.00	3.40	3.00	1.00	0.40
Engagement	15%	5.00	3.60	5.00	2.10	3.00	3.60	3.00	3.70	1.40
Reporting	15%	3.90	3.10	2.80	3.60	2.30	3.20	4.10	3.30	1.60
Integration	20%	3.00	3.40	3.00	2.40	2.20	2.20	4.40	2.40	0.60
User experience	10%	3.40	3.00	3.80	3.20	3.40	4.20	5.00	3.80	0.60
Strategy	50%	3.10	2.40	3.60	2.20	3.40	2.80	3.80	2.80	2.60
Execution road map	10%	3.00	3.00	3.00	1.00	3.00	5.00	5.00	3.00	1.00
Market approach	10%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00
Vision	25%	3.00	1.00	3.00	1.00	5.00	3.00	3.00	3.00	3.00
Planned enhancements	5%	5.00	1.00	5.00	3.00	3.00	5.00	5.00	5.00	1.00
ABM readiness	5%	1.00	1.00	3.00	1.00	1.00	1.00	3.00	1.00	1.00
Supporting products and services	25%	5.00	5.00	5.00	3.00	3.00	3.00	5.00	3.00	3.00
Pricing/cost	20%	1.00	1.00	3.00	3.00	3.00	1.00	3.00	1.00	3.00
Market presence	0%	3.10	3.40	4.40	2.00	1.95	3.40	3.60	3.30	1.70
Customers	50%	3.80	3.80	4.40	2.40	0.30	2.40	3.60	4.40	1.00
Financials	50%	2.40	3.00	4.40	1.60	3.60	4.40	3.60	2.20	2.40

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

Leaders

› **Seismic extends content customization, control, and reporting.** For content administration and management, Seismic has all of the bells and whistles: decomposition of PowerPoints and PDFs into individual pages; in-depth workflows for reviews and approvals; and rapid assembly of customized content, which gets automatic updates as it changes. Seismic goes further with the ability to fully edit Seismic-stored PowerPoint within the solution; it requires no cutting, pasting, or

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uploading. Seismic's tagging functions also support logical expressions to map recommendations to multiple if/then/or conditions to recommend content for any combination of opportunity, role, industry, or other field in Salesforce. Dynamic templates can also integrate with and pull data from other tools such as various configure, price, and quote (CPQ) and contract life-cycle management (CLM) applications. The only weakness is robust support for live and virtual presentations, but a strong product road map has that covered. Rapid growth in terms of revenue and customers with broad industry coverage points to a bright future for Seismic.

› **ClearSlide makes virtual presenting come alive.** Starting from a basis of live presentation functions, ClearSlide has extended its offering to virtual presenting. The solution offers most of the benefits of a content management solution, combined with robust screen sharing and detailed tracking of how the presentation is viewed, which can be used for later review and updates to the CRM. Email analytics are standard, and the ability for sellers to add video into emails is appealing. Those same analytics give sales managers and others a view into what sellers are doing and enable them to coach sellers on how well they are using content to engage with prospects. That may be important: ClearSlide offers sellers a lot of freedom in assembling materials, but relatively weak approval functions make tracking seller-built versions a challenge. A new version, named Ion, addresses this and deepens many other functions.

Strong Performers

› **Brainshark's solution centers on learning.** A strong administration workbench breaks down content slide by slide for flexible assembly (a function that many solutions provide) and deep integration with its own LMS. And Brainshark covers a range of activities from onboarding to coaching. The Sales Accelerator add-on component reinforces the ability to coach sellers and report on how content and sellers' activity are affecting sales cycles. Brainshark has a strong revenue base, compared with most other SEA vendors with long-established customer bases, along with well-defined services that make Brainshark a reliable partner for sales enablement needs. Pricing is somewhat complex with many options. On October 26, 2016, Brainshark and Highspot announced a partnership whereby Highspot's content management solution can leverage Brainshark's learning management content. When evaluating Brainshark and Highspot, take time to understand how these solutions work together.

› **Savo is solid, stable, and built to last.** Savo's presence in the sales operations automation market since 1999 and healthy revenues reflect its extensive experience in sales enablement projects and working with customers. The Savo solution has complicated pricing and options but serves as a strong foundation on which to build content management with good CRM and email integration, workflow, and approvals. Support for digital postcards provides customized microportals and customized videos with good engagement tracking capabilities. Strong analytics, with the promise of predictive recommendations, establishes a good vision for the future expansion of functionality.

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› **Mediafly goes deep on interactive presentations.** A strong focus on the ability to quickly assemble and easily pivot between various presentation elements on the fly, along with strong capabilities to build highly interactive capabilities, differentiates Mediafly from other vendors. The very synchronous focus on live presenting that makes Mediafly so well suited to reps working face to face with customers also means that more asynchronous functions for CRM integration, engagement analytics for emails, and robust tagging for recommendations are weaker. Mediafly, with its DNA from managing access to secure content in the media sector, has a strong foundation to build on, and its vision incorporates stronger asynchronous functions for the future. For those who want a solution that enables a highly interactive and well-tracked live experience, Mediafly is worth a close look.

› **CallidusCloud has strong integration with sales force automation (SFA) tools.** The SFA integration is strongest with CallidusCloud's own portfolio of solutions for CPQ, CLM, and more. When bringing in pricing and other information to assemble and customize offerings, CallidusCloud can do some things that few others can. Automated decomposition of presentations into individual slides, customizable microportals with multiple pieces of content, and extended analytics capabilities add up to a well-rounded solution. A somewhat old-fashioned service-ticket-based enhancement process frustrates some users, but a large customer base and healthy revenues mean that CallidusCloud will continue to be a player in this market.

› **Showpad covers the presentation bases.** From basic administration, with good support for customized microportals, to native apps for presenting and accessing content from multiple devices, Showpad covers all of the bases as a content presentation platform. Its roots in live presentation and meeting logging and tracking make it a good choice if you focus more on live interaction than email. Although Showpad doesn't lack in engagement analytics or CRM integration with Salesforce, full integration is still on the road map for other CRM solutions. With a healthy user base and strong coverage for Europe because Showpad started there, it has the vertical and geographical coverage to meet the needs of many buyers. Various product levels and add-ons can make pricing somewhat complex.

› **KnowledgeTree helps manage the content creation process.** KnowledgeTree offers some strong administrative capabilities with customizable workflows for approvals and publishing, which are useful if you have a multitiered approach to content creation with subject-matter experts submitting content to editors and additional approvals that marketing or legal may require. Version tracking for customized assembly of approved content is weaker but planned. KnowledgeTree offers a package of basic content access functions in a portal-only version; full CRM integration and well-defined recommendations come with the more expensive version. KnowledgeTree is more focused on the asynchronous approach with good support for email templates and engagement analytics. Support for seller-videos and live presentations lags.

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Contenders

› **Skura focuses on the portal.** Skura excels in providing a content portal as the main place for accessing and using sales content. Strong capabilities, such as breaking down PowerPoint presentation slides into separate HTML objects, offer easy and quick assembly of customized content. Limited integration with CRM and lack of recommendations mean that this is a solution for sellers who know exactly what they want. Extensive permissions and roles make Skura well suited to highly regulated industries like life sciences and finance. Skura functions are embedded into the life-sciences solution that it sold to Indegene. For companies that have expert or technical sellers who don't need a lot of guidance in building and using content, Skura is worth a look.

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Supplemental Material

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by August 31, 2016.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities. We evaluated each product using the same scenario(s), creating a level playing field by evaluating every product on the same criteria.

› **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and

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market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] A multitude of vendors beyond the nine in this report focus on sellers' efficiency and effectiveness. See the Forrester report "Vendor Landscape: Sales Enablement Automation."

[2] The earliest vendors, Savo and CallidusCloud, provided solutions for sales operations process automation and then acquired or invested in new functions to support SEA. Brainshark, another early entrant, focused on learning management for sellers and expanded to sales enablement.

[3] ABM vendors have created a gold-rush frenzy, but many organizations may already have many of the required pieces. SEA supports ABM with account-level reporting. See the Forrester report "Vendor Landscape: Account-Based Marketing, Q4 2016."

[4] For more information, see the Forrester report "Vendor Landscape: Sales Enablement Automation."

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