The Aragon Research Globe™ for Sales Coaching and Learning, 2020

Digital Selling starts with Coaching and Learning

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Topic: Sales Coaching and Learning

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

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SUMMARY

The sales coaching and learning market has taken off due to the demand for better onboarding and training of sales teams. In the first Globe report for this market, Aragon evaluates 15 major providers who are making a difference in sales coaching and learning.

Key Finding:

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

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Key Takeaways

1. Sales coaching and learning is poised to grow in sales departments as an alternative to LMS and learning experience platforms.
2. Sales organizations need to focus on skills in an era of post-pandemic digital selling.
3. Microlearning and video role-plays are critical elements to deploy to ensure skills and knowledge are updated on a daily or weekly basis.

Introduction

The sales coaching and learning market has experienced strong growth and, given the robust features that many providers offer, this market is proving to deliver the type of learning platform that everyone needs. In a period of post-pandemic remote work, the need for digital selling has never been greater. This puts pressure on sales teams to perform at the same or greater levels than before, and this means that they need to be more prepared than ever to sell remotely. In this first Globe report, Aragon reviews the key trends in sales coaching and learning and provides in-depth analysis of 15 major providers.

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

Since Aragon declared sales coaching and learning as a market, we have seen strong growth and more new providers. This is due to the fact that enterprises are reaping the benefits of these new platforms and word is spreading about their value.

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

Figure 1: Key elements of a sales coaching and learning platform.

Sales Coaching and Learning Is About Learning Every Day

Just like professional athletes, sales professionals need to be on top of their game. This means more regular practice of their craft. Sales coaching and learning platforms offer this kind of capability in the form of role-plays and microlearning. In a top SCL offering, the platform is engaging with sales professionals every day.

When compared to corporate learning offerings that still follow the traditional teach-and-test approach, the engagement levels are far lower. This is one of the reasons for the emergence of sales coaching and learning, and one of the reasons that end-users are so dissatisfied with their corporate learning platforms.

The Current State of Corporate Learning

While many corporate learning providers are in the process of making their interfaces more modern via learning experience platforms (LXP), the reality is that most corporate learning providers are now racing to add more off-the-shelf content offerings to their platform. Some providers are just discovering some of the core capabilities that are in sales coaching and learning, such as microlearning.

The whole reason that the sales coaching and learning market emerged is due to the fact that learning providers were still too focused on LMS features, versus the true objective of delivering knowledge and learning outcomes.

So, while corporate learning platforms will not go away, there is no doubt that sales coaching and learning platforms are designed to meet the needs of sales teams who, like athletes, need to practice their craft on a regular basis. Aragon feels that many corporate learning providers will end up emulating more of what sales coaching and learning providers offer.

The Digital Sales Era Is Here and It Will Never Go Away

While inside sales teams have always been remote, now, in a post-pandemic era, the reality is that almost all sales teams will have to become adept at selling via voice and video calls. For people who are not used to this approach, the new situation puts extreme pressure on them. These associates need to learn how to use technology to communicate and collaborate just as effectively as they would in person.

Part of the role of SCL is to help prepare these sales professionals for this digital selling approach. In 2020 and beyond, this means more practice sessions and more role-plays focusing on both selling skills and in-meeting communications skills. If there was ever a time to deploy sales coaching and learning, that time is now.

Investing in Better Sales Training

The best sales organizations have always invested in both the training involved with onboarding new sales reps as well as regular training delivered to sales reps and their managers. The first step in better sales training starts with the deployment of a sales coaching and learning platform.

This is a vital step for a sales organization. The investment that sales teams make in sales training will be returned five times over via higher sales and shorter sales cycles. In a digital era, it is all about employee engagement. Engaging sales associates with better training and by providing them with regular training isn't optional in 2020.

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

Sales Coaching and Learning Becomes Part of the New Sales Tech Stack

There are still many sales organizations that are doing platform-based training for their sales teams. We all know that this can no longer be the norm and that digital delivery of sales training

is the reality we live in. There are still many sales teams that have yet to discover the value of these new platforms, and now, during the post-pandemic era, the pressure is on for them to do more training remotely.

A critical part of this process is onboarding. In many organizations, sales reps will be hired and onboarded without ever leaving their house, and that means that a sales coaching and learning platform needs to be in place with courses and curriculum ready to go.

Sales Coaching and Learning—Key Capabilities

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

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

The key functionality that enterprises should look for in an SCL platform includes:

- Onboarding

- Video role-plays (can also include audio)

- Just-in-time microlearning

- Ongoing skills development

- Ability to manage content and courses

- Analytics

SEPs and Sales Coaching and Learning: Together or Separate?

In 2019, Aragon made sales coaching and learning (SCL) a breakout market from the legacy corporate learning market. SCL has seen strong growth as sales teams pivot from classroom training to a digital SCL offering.

This report focuses on providers of SCL platforms, noting that a number of them offer sales enablement as well. These include Bigtincan, Brainshark, Regalix, SalesHood, and Showpad.

One of the reasons that delivering on the promise of sales coaching and learning is hard is because delivering training requires content, and not all SEP/SCL providers offer training content.
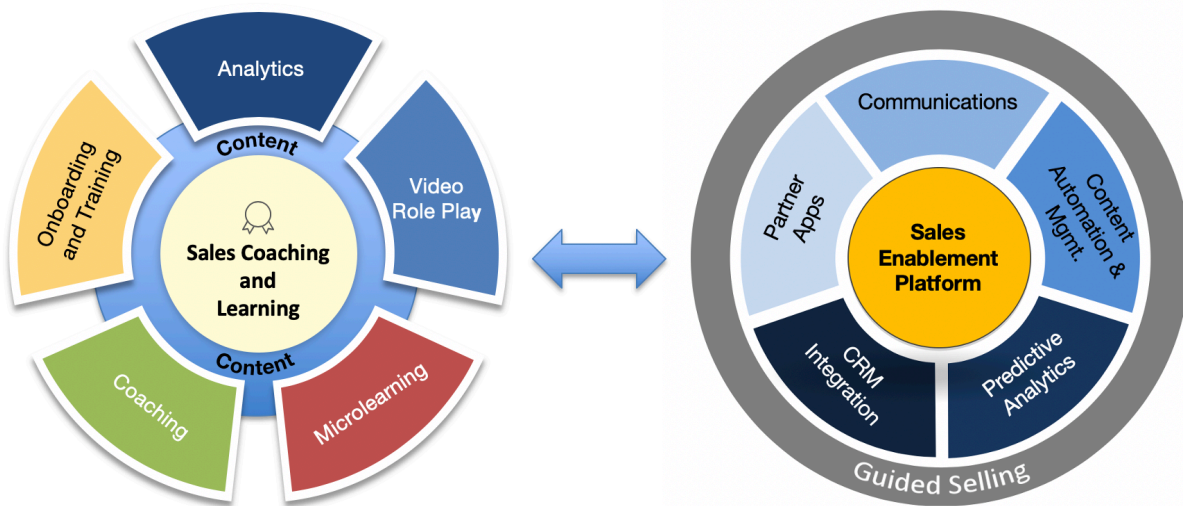
Figure 2: Sales enablement platform providers are now beginning to offer sales coaching and learning natively or via a partnership.

Onboarding: How Quickly Can You Prepare a New Team?

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

In the post-pandemic time we are living in, onboarding can no longer be an in-person experience. While onboarding classes can take place via video meetings, having the right sales coaching and learning platform is critical to ensure onboarding can be done virtually. To meet these needs, a complete approach to learning is a requirement; simply having an LMS in place is no longer sufficient. This trend is pushing the demand for and the growth of the sales coaching and learning market.

Microlearning Becomes a Must-Have Feature for Sales Teams

If there is any need that is vital for sales teams, it is the need to practice delivery of knowledge and ideas to customers. Microlearning is really poised to achieve much higher levels of adoption, both in sales coaching and learning, and in the broader learning market. The ability to deliver quizzes and coaching tips to a rep right before sales call is critically important. Microlearning is important in high-stakes industries where salespeople are challenged with delivering large volumes of customized knowledge to buyers, such as in life sciences, manufacturing, energy, and financial services.

The idea of reviewing what you are going to do on an upcoming sales call is a best practice that top performers engage in every day. SCL offerings do this for everyone by being able to allow a rep to review a key concept or key product features right before a call.

Video Role-Plays—More Practice Leads to Better Performance

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

Given the global nature of work, video learning is a way to accomplish the same results as being there in person with an expert. The reason enterprises need video learning now is due to the unprecedented speed of business; workforces are no longer staying in place like they used to.

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

The Current State of Sales Coaching

The market for sales coaching has shifted beyond just what sales managers need to coach on. While this continues to be a vital area in SCL, the market has changed and evolved. Sales

coaching can be delivered directly to sales reps in the form of coaching tips and suggestions on what to do next.

The reality is that guided selling is coming to both sales enablement and sales coaching and learning. While most of the vendors in this report focus more on sales learning, one of the providers in this report, Upland Altify, focuses exclusively on guided selling.

The automation of sales methodologies has emerged as a new category, which Aragon refers to as customer revenue optimization (CRO)—or guided selling for short. While some providers in SEP offer lightweight guided selling, selling methodologies are more complicated than suggesting a next step.

Coaching not only helps the representative because they know they are going to get regular coaching, but it also helps a new sales manager make sure they don't miss this critical step. In the short term, having more coaching features for reps and more coaching opportunities for managers should be evaluated by enterprises.

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Making Sales Coaching and Learning a New Daily Habit

The best salespeople make SCL a daily habit. They are constantly practicing and rehearsing. For the sales organization, making SCL a routine that happens every day can be challenging.

Figure 4 shows the continuum of SCL. For many organizations, they do items 1 and 2 on a one-time basis. The best managers do regular coaching. Organizations need to do all four items and it needs to be synchronized. That is why an SCL platform will prove to be so valuable to a sales organization.
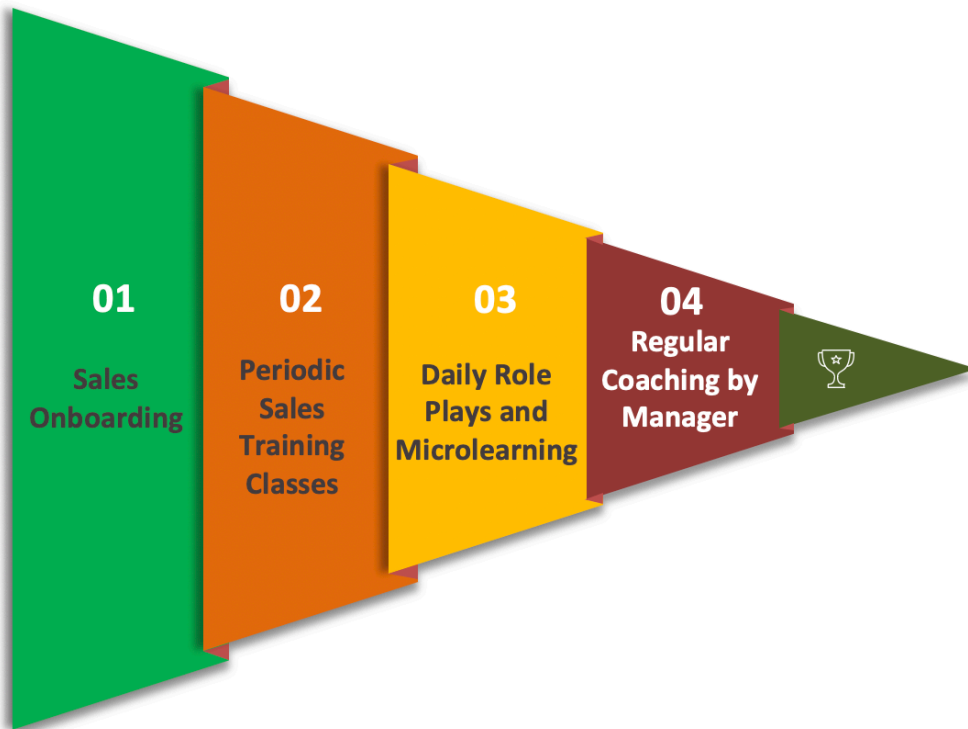

Figure 3: The four critical aspects of sales coaching and learning.

The Aragon Research Globe™ for Sales Coaching and Learning, 2020
(As of 7/9/2020)
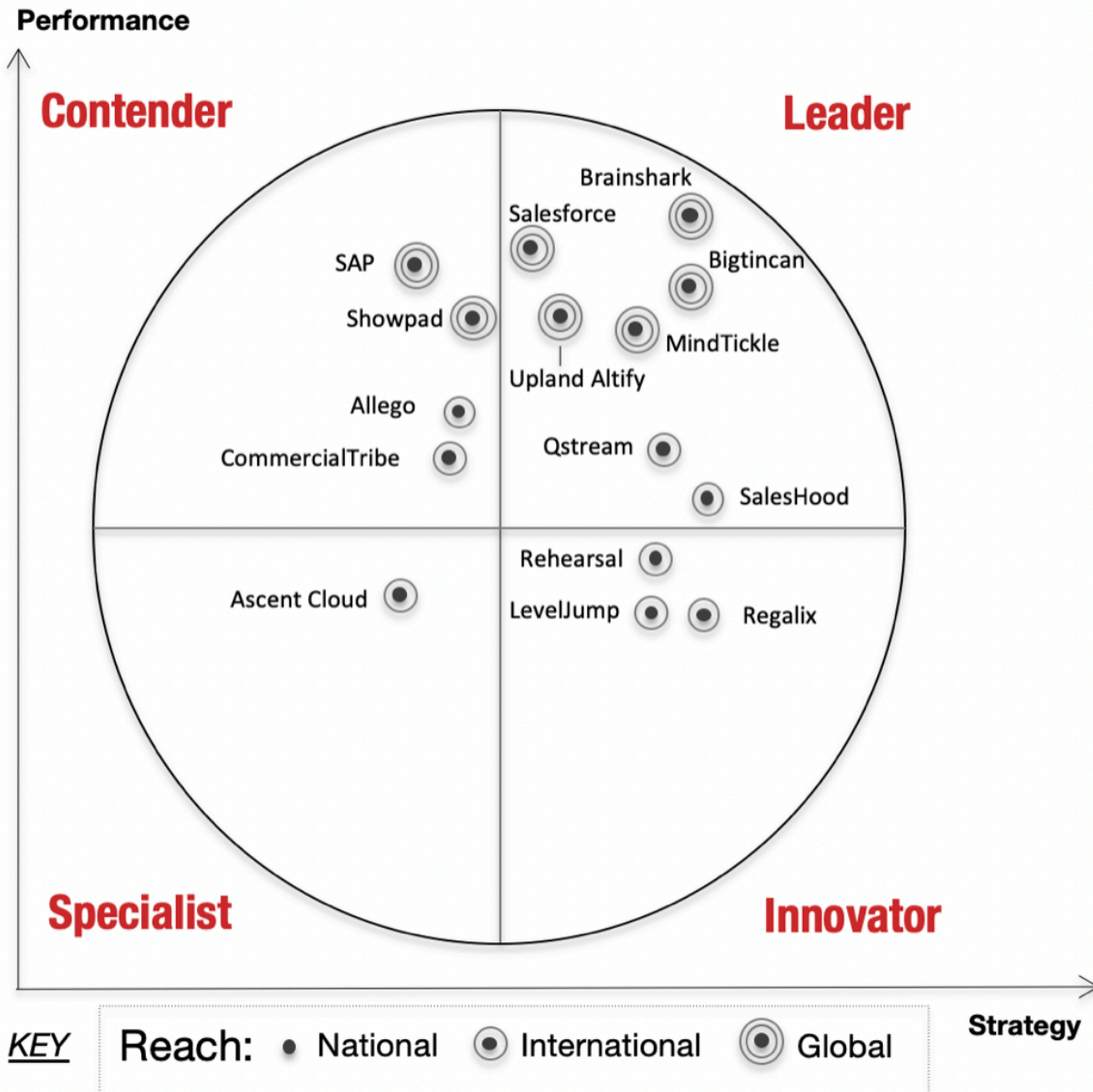
Figure 4: The Aragon Research Globe™ for Sales Coaching and Learning, 2020

Leaders

Bigtincan

Bigtincan, a leader in sales enablement, offers a full sales coaching and learning offering based on its Zunos acquisition in 2018. Bigtincan continues to do more acquisitions in this space than any other provider. Bigtincan also acquired Veelo in 2019 and the integration of Veelo offers more guided selling functionality. Bigtincan Learning includes microlearning, in-app messages, video coaching, role-plays, and access to content offline. Additionally, enterprises can create their own courses with an intuitive course builder. One of the important additions to the Bigtincan platform is its embedded video coaching with machine learning behavioral scoring, which can be used for daily role-plays.

Bigtincan Zunos is sold with its flagship sales enablement offering and also offered standalone. One of the leadership features of Bigtincan is that its Bigtincan Hub platform was initially optimized for iOS-based devices and now provides the same experience on Android, Windows, and any Internet browser. The ability to sync training files for offline access is critical for many sales and service teams.

Strengths

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

Challenges

- Market awareness outside of the U.S.

Brainshark

Brainshark continues to push the envelope in sales coaching and learning. Besides its flagship content authoring capabilities, which enable the creation of courses and other multimedia learning content, Brainshark also offers onboarding, continuous microlearning, and practice via video role-plays. Its machine-based analysis of role-plays can quickly identify to managers which sellers need help (and on which areas). In May 2020, Brainshark added new Readiness Scorecards. This advanced form of analytics, which is based off of Brainshark's acquisition of Rekener in 2019, will also help sales managers and leadership understand what areas of sales skills and techniques need focus, at both the individual, rep, and team levels.

Brainshark still offers engagement functionality for content creation, management, and sharing. That being said, its main focus is being a sales coaching and learning platform provider. In 2020, Brainshark partnered with GO1, which offers off-the-shelf training for sales skills such as negotiation tactics and account management. Brainshark can run natively in Salesforce CRM and is integrated with Microsoft Dynamics 365. The demand for sales coaching and learning continues to grow, and Brainshark is well positioned to capitalize on this growing demand.

Strengths	Challenges
• Onboarding and learning	• Focus outside of sales coaching and learning
• Content and learning analytics	
• Salesforce and Outlook integrations	
• Content creation and sharing	
• Video coaching and practice	
• Sales scorecards	

MindTickle

MindTickle continues to win enterprise customers as it increases its funding. In July 2019, it raised $40 million during a C round that was led by Norwest. MindTickle offers a coaching and learning platform that delivers full onboarding and training, as well as regular coaching, microlearning, and role-plays. MindTickle also supports the delivery of classroom and virtual instructor-led training. In the area of coaching, MindTickle continues to offer its coaching framework, which includes role-specific competency maps to enable personalization of learning paths and coaching.

In May 2020, MindTickle enhanced its role-play capabilities with voice analytics that provide salespeople with immediate feedback on word choice (key words vs. filler words) and overall pace of delivery. MindTickle also enables teams to compete via leaderboards and other gamification techniques. MindTickle offers advanced analytics so that sales leaders know which teams and individuals they need to focus on. MindTickle integrates with sales enablement, HR, content management, and CRM platforms.

Strengths	**Challenges**
• Platform approach and single data model	• Awareness outside of the U.S.
• Competency-driven coaching framework for reps and managers	
• Robust integrations to CRM, SE, LMS, and HR platforms	
• AI-based analytics	
• Smart role-plays with AI feedback	
• Micro-learning with native content creation capabilities, social gamification, and spaced reinforcement	

Qstream

Based in Burlington, Massachusetts and Dublin, Ireland, Qstream focuses on long-term knowledge retention and behavior change to increase sales force proficiency to drive revenue. Qstream solves a big problem: product life cycles are short, and so is the lifespan of information. When combining scientifically proven spaced learning with best practices (scenario-based Q&A challenges, repetition, real-time feedback, peer interaction, and game mechanics), sales reps are able to recall information and apply newly learned skills in the field sooner. Qstream pioneered this multi-pronged delivery method for the life sciences industry and now is expanding outside of that core market.

Qstream has made it easy to deliver, track, and manage knowledge from a mobile device. It's simple, a question-based approach to delivering knowledge in the most engaging way using game mechanics gives sales professionals the right information at the right time to accurately discuss with prospects and customers. Qstream supplements traditional L&D methods to reinforce knowledge, create meaningful behavior change, and provide managers with the learning analytics they need—at the individual level—for guiding targeted coaching actions that help increase proficiency and quantify the return on investments and training efforts.

Strengths	**Challenges**
• Just-in-time knowledge delivery	• Overall focus on video
• Analytics	
• Mobile capabilities	
• Life sciences install base	

Salesforce

Salesforce offers myTrailhead, which is the paid offering based off of Salesforce's free offering called Trailhead. myTrailhead is a social learning platform that features profiles and the ability to create courses and learning paths. One of the things that will be sure to attract sales organizations is the built-in leader dashboards that have proven to be very popular with sales organizations. The mobile experience is also good for salespeople and managers who are on the go.

With custom content creation and integration of other content, enterprises can quickly create custom trails (learning paths) that can help with onboarding, skills development, and different playbooks. myTrailhead's tight integration with Salesforce Sales Cloud among other Salesforce products makes it an option that Salesforce users will want to evaluate. Besides internal sales training, myTrailhead is also optimized for partner and customer training, which is a growing need for enterprises that use partners for distribution.

<table>
<tr><td align="center">**Strengths**</td><td align="center">**Challenges**</td></tr>
<tr><td>

- Tight integration with CRM
- Content creation
- Gamification and leaderboards
- Customizable learning paths

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- Pricing

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SalesHood

SalesHood is a purpose-built, all-in-one sales enablement platform delivering fast time to value to its customers. SalesHood automates learning, coaching, and selling processes and measures revenue outcomes by correlating enablement activity to sales performance data. SalesHood continues to power a number of fast-growing, sales-focused firms by helping companies speed up their sales enablement impact with just-in-time learning, coaching, and content sharing. SalesHood continues to help companies realize huge improvements in time-to-ramp, sales velocity, and quota attainment. SalesHood is available for direct sales and partners, and is created for remote teams to access anywhere, anytime. SalesHood has a complete sales methodology embedded into its platform and library with its Selling Through Curiosity partnership.

SalesHood enables the delivery of branded content as well as videos. The ability to surface the right content and coaching opportunities in Salesforce and Microsoft based on the status of the opportunity and deal is helping SalesHood to win sales content management opportunities. SalesHood also enables automated content delivery that can increase overall productivity of sales teams. Finally, SalesHood provides a robust library of free and premium sales training content, which we expect others to emulate in sales coaching and learning.

Strengths	**Challenges**

Strengths

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

Challenges

- Market awareness

Upland Altify

Upland Altify, based in San Jose, CA, is focused on all aspects of sales and manager coaching via its customer revenue optimization platform. Upland Altify assists enterprises to increase revenue growth through repeatable, guided selling and regular coaching. In October 2019, Altify was acquired by privately-held Upland Software for $84 million in cash. Altify's customer revenue optimization platform offers 3 modules: Sales Process Manager, Opportunity Manager, and Account Manager.

In May 2020, Upland Altify launched its Spring 20 release that now includes advanced Altify Account Planning with Tableau and Salesforce Einstein integration, Qvidian Proposal Management, and Kapost Content Operations. Kapost Content simplifies the process of finding relevant content and courses. Altify's integration into Salesforce CRM means that coaching is always on and available. The Upland Altify intuitive interface guides sales reps to take the next best step in an account.

Strengths	**Challenges**
• Guided selling	• Market awareness outside of the U.S.
• Call coaching	
• Opportunity management	
• Account planning	
• Advanced analytics	

Contenders

Allego

Allego continues to offer its sales coaching and learning platform that leverages video as one of its core capabilities for sales learning. New capabilities include the ability to include prompts and surveys inside of videos, which are easy to create and share on mobile devices. In 2020, Allego also added content recommendations to the platform. Allego offers onboarding, coaching, and video learning with a strong set of analytics. For skill development and to reinforce learning in the field, Allego offers flash drills that deliver daily questions to reps' smartphones on the basis of individual competency attainment and needs.

In April 2020, Allego introduced its Call Coaching offering. Similar to other conversational intelligence offerings, Allego Call Coaching records calls and allows reps and managers to understand talk time and other important dynamics that impact the short- and long-term outcome of calls. The ability to access videos online and offline on mobile devices also makes Allego a solid option for sales organizations.

Strengths	**Challenges**
• Video learning	• Market awareness outside of the U.S.
• Call Coaching	
• Mobile support	
• Video creation	
• Analytics	

CommercialTribe

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

One of the key benefits to sales teams is the integration with CRM that allows an organization to connect coaching activity with sales performance. For example, reports may show the impact of coaching on win rates. Sales leaders can focus coaching toward the highest leverage moments that influence business results.

Strengths	**Challenges**
• Built for sales manager persona	• Balancing coaching vs. learning
• Assessment maps	
• Coaching plans	
• Web/mobile app	
• Analytics	

SAP

SAP offers SAP Litmos Solutions, which includes a sales coaching and learning platform. Litmos was part of the CallidusCloud acquisition in April 2018. SAP Litmos Training now includes video role-plays and the ability to add off-the-shelf and custom content. Additionally, SAP Litmos Training Content adds off-the-shelf courseware that helps salespeople enhance their sales skills. The customer experience edition of SAP Litmos Training includes over 200 interactive courses on a variety of sales and service skills. SAP Litmos Training Content, enterprise edition, adds an additional 1500 courses, plus 1000 downloadable course resources, across 20 categories of topics important to learners across the enterprise.

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

Strengths	Challenges
• Mobile support	• Awareness outside of SAP install base
• Video role-plays	
• Other sales enablement modules	
• Partner and channel training	
• Off-the-shelf learning content	

Showpad

Showpad continues to invest in market expansion and in its sales enablement platform. Showpad Coach (formerly LearnCore) offers learning paths that deliver micro-learning courses for sales reps on the go. Showpad has built-in quizzes that help to access knowledge levels. Showpad Coach courses follow a consistent methodology: learn, test, and Pitch IQ (which is its role-play module). Showpad Coach also offers built-in gamification features to incentivize sales reps to constantly do better. Additionally, Meeting IQ offers conversational intelligence by automatically capturing meetings and taking notes.

Showpad, which is optimized for web or mobile device access, offers advanced search functionality so content, training materials, and relevant meeting recordings can be located quickly. This, combined with content analytics to show what content is performing, and in what part of the funnel, helps to increase sales effectiveness and productivity. Showpad also offers a Manager Hub that provides tools for managers. Along with its strengths in content creation and the ability to update content for everyone, Showpad integrates with CRM systems such as Salesforce and Microsoft Dynamics, so sales professionals don't waste time looking for files or updating their CRM with the latest activities.

Strengths	**Challenges**
• Mobile experience	• Market awareness in U.S.
• Content analytics	
• Meeting analytics	
• Content sharing	
• Salesforce integration	
• User interface	

Innovators

LevelJump

LevelJump offers a sales coaching and learning platform that focuses on onboarding, coaching, readiness, and enablement. LevelJump can deliver prescriptive training sequences that are easy to build and deploy. LevelJump runs natively in Salesforce Sales Cloud—a benefit to those enterprises that leverage that platform.

LevelJump also offers coaching rooms, which give a team a dedicated space for coaching. In May 2020, LevelJump announced it was partnering with Gong.io to add more conversational intelligence to the combined offering. LevelJump provides a robust set of analytics that need Salesforce to be leveraged. One of the key analytics attributes we like is the ability to visualize training results that are driving business outcomes.

Strengths	**Challenges**
• Salesforce native support	• Market awareness
• Analytics	
• Training sequences	
• Coaching rooms	

Aragon
Research

Regalix

Regalix, based in Mountain View, California, launched its sales enablement and coaching platform Nytro in January 2020. For a new offering, Nytro is a fully-featured platform that offers both sales enablement and sales coaching and learning. The Nytro platform allows enterprises to virtually onboard, train, and coach reps at scale via personalized micro-learning tracks that combine videos, quizzes, assessments, and other informative just-in-time training materials. Nytro has a powerful feature called Pitch Master, which allows reps to practice, master, and record their demo pitches. Nytro uses AI to analyze pitch submissions across a number of useful dimensions, including clarity of speech, duration of speech, coverage of topics, and more, to determine which reps are ready to sell digitally and which require more coaching. The platform also includes content authoring and makes it easy to create and organize content.

Nytro uses machine learning to power its context-sensitive recommendations for guiding sales and ongoing learning and coaching. The platform also integrates with Salesforce, Microsoft SharePoint, Google Drive, and other applications. Besides the platform, Regalix also offers enterprises professional services to assist with the creation of sales and training content.

<table>
<tr><td align="center"><u>**Strengths**</u></td><td align="center"><u>**Challenges**</u></td></tr>
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- Content creation
- Video coaching and role-play
- Sales enablement features
- Salesforce integration
- Content analytics

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- Market awareness in U.S.

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Rehearsal

Rehearsal offers video-based sales coaching and learning. Rehearsal is an easy-to-use platform that focuses exclusively on video role-plays. It also offers coaching feedback from managers and peer interactions via its collaboration capability. In April 2020, Rehearsal added AI-based role-play feedback, which makes learning more self-service. It also reduces review time by managers.

The built-in analytics provide sales reps and their managers with insights about where they are in their training or onboarding, as well as what they need to focus on. Unique features, like Hot Seat, help to drive knowledge retention by having competition and only enabling a one-time answer. By leveraging Amazon AWS, Rehearsal can deliver sales coaching and learning programs on a global basis.

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Strengths

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

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Challenges

- Market awareness

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Specialists

Ascent Cloud

LevelEleven announced a merger with Geopointe in February 2020 to form a new company called Ascent Cloud. LevelEleven's main focus is on driving performance via scorecards, coaching, leaderboards, sales contest automation, and live TV broadcasts. The LevelEleven coaching solution leverages analytics to allow managers to know who needs coaching and what to focus on via its Coaching Cadences. Scorecards for both sales reps, managers, and sales leadership have an overview of individual and team performance as well as where to course correct.

Geopointe, which previously had partnered with LevelEleven, is a geolocation solution for CRM that helps to enable field sales using geo-contextual intelligence. Geopointe is ideal for sales teams that need to optimize sales routes, visualize sales territories, and increase efficiency of time spent in the field. For sales and service use cases, Geopointe can help to maximize customer face time by having the best routes to minimize downtime.

Strengths	**Challenges**
• Coaching	• Balancing two different product offerings
• Gamification	
• Scorecards	
• Engagement	
• Location services (Geolocation)	
• Territory planning	
• Route optimization	
• Analytics	

Aragon Advisory

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

Bottom Line

Sales coaching and learning is the newest and most focused way to onboard and continuously train sales representatives and sales managers. SCL platforms offer a robust and consistent way to deliver training that is vital to getting higher rates of achievement across the sales organization. Enterprises should leverage this report to evaluate and select an SCL provider that is separate and distinct from their current corporate LMS provider.

Aragon Research Globe Overview

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

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

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

Dimensions of Analysis

The following parameters are tracked in this analysis:

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

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

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

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

- **Viability**: Financial viability of the provider as measured by financial statements.

- **Pricing and Packaging**: Is the offering priced and packaged competitively?

- **Product**: The mix of features tied to the frequency and quality of releases and updates.

- **R&D**: Investment in research and development as evidenced by overall architecture.

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

- **Americas** (North America and Latin America)

- **EMEA** (Europe, Middle East, and Africa)

- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.).

The market reach evaluation includes:

- Sales and support offices worldwide

- Time zone and location of support centers

- Support for languages

- References in respective hemispheres

- Data center locations

The Four Sectors of the Globe

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

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and effectively perform against those strategies.

- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.

- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.

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

Inclusion Criteria

The inclusion criteria for this Aragon Research Globe is
- a minimum of $6 million in primary revenue for contact center or a minimum of $8 million in revenue in a related market (sales coaching and learning).
- Shipping product. Product must be announced and available.
- Customer References. Vendor must produce customer references in each hemisphere that the vendor participates in.

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

New vendors included in this report:

- **Regalix**

- **Salesforce**

- **Upland Altify**

Noteworthy vendors not included in this report:

- **Gomo Learning**—Gomo focuses on horizontal use cases vs. sales.

- **Veelo**—Veelo was acquired by Bigtincan.