VAINU

SALES TOOLS

148 vendors in 15 categories
every B2B sales and marketing professional should know

78 new vendors added compared to the 2024 edition!

Introduction

It's dead simple. Salespeople can't escape technology. It reduces manual tasks, improves performance, and overall, helps you close more deals. Simply put, salespeople who use technology outperform their peers.

Sales intuition and gut feeling belong to the past. The modern salesperson trusts technology to understand which prospects are most likely to be successful with their product or service, when to reach out to those prospects, and what they should be talking about with them. With the right tools at hand, salespeople save time on tedious and time-consuming administrative tasks and can focus on what matters the most: providing value for people and businesses.

There's no denying sales technology improves your process. The question is, which are the right tools for your business?

Having and using the right software is essential to achieving success in sales. More than ever, an organization's success hinges on how quickly and effectively they adopt sales technology. But with so many choices out there, building a robust sales tech stack for your business can be overwhelming.

New sales tools enter the market every day, all promising to help salespeople be more efficient and better at their jobs—the options are endless. In short, the possible winnings for salespeople who tap into the power of sales technology are great, but the sheer number of choices is straight up intimidating.

Every year, we test and try these tools. And every year, we publish our findings. In this eBook, we've listed 148 B2B sales tools that we think stand out from the crowd.

To make the list easier to consume, we've divided it into 15 categories.

In this edition, we've added six new categories:

- Sales Engagement
- Account-based Sales & Marketing
- Revenue Operations Platforms
- Sales Productivity and Copilots/AI Agents
- Compensation Management
- Partner Ecosystem Platforms

Before getting into the list, we're dedicating a few pages to go through the most important considerations when investing in sales technology—a refresher of what to look for when building your sales tech stack.

We hope you enjoy the read!

Table of contents

How to choose your sales tech stack

Not long ago, a salesperson would get by with just a phone and the yellow pages. Now, the average sales rep uses a dozen apps and tools every single day. Digital tools and systems have drastically transformed sales and marketing during the past decades. With the right technologies in its arsenal, a company may flourish, whereas inadequate tools will leave any company stranded with lengthy and expensive contracts that bog down the entire business. More than ever, choosing the right tools and technologies can make all the difference.

Revenue Ops systems, partner ecosystem platforms and AI are becoming common practice for many sales organizations. Because these tools solve specific problems, oftentimes, businesses plan and invest in each of these areas separately. This leads to a disconnected sales tech stack that serves the needs and goals of individual departments, rather than the business as a whole.

> The key to choosing the right tools is collaboration and cooperation between different departments to identify common needs and make improvements in the most impactful areas.

Simply adding tools will not make your teams more productive or drive faster growth. Instead, the companies that have adopted a digital and data-driven mindset into their core activities are already building more holistic sales and marketing tech stacks and architectures. Cross-functional ways of working and shared tools and technologies are the new black.

However, with over a 10 000 vendors in the space and more being added daily, building your tech stack can quickly become an overwhelming exercise. The key to choosing the right tools is collaboration and cooperation between different departments to identify common needs and make improvements in the most impactful areas. Start by identifying your most pressing pain point. If your salespeople don't have enough quality leads to work, you need to set out to look for a solution that addresses this problem: a marketing automation tool streamlining your lead generation, and a sales intelligence tool to skyrocket your sales prospecting.

We recommend you build your tech stack gradually, measuring every single tool for return on investment. In the long run, a robust sales and marketing architecture that spans all areas of the organization

will be a significant investment. Use reliable data to test and validate early investments.

Focus on key integrations

When building your tech stack—no matter how complex—it is essential to plan tight integrations between systems and tools. The average salesperson logs into a dozen sales tools every day. Thus, automation and integrations are essential to boost productivity.

Successful integrations guarantee you can develop a data-driven approach to sales.

Data-driven sales is an approach to sales.

The sales process requires and generates plenty of data, but often this data is stored in different systems. A CRM collects internal operation data (what are the outcomes of your calls and meetings?),

whereas a marketing automation platform accumulates behavioral data (how did your leads engage with your content?). Plus, a sales intelligence tool adds external company data (what are the characteristics of your prospects?). For seamless alignment, the different tools should "talk" to each other, so data can automatically be synced between systems.

With data seamlessly flowing between systems, all teams have a complete picture of the whole sales process. Only then you can feed back the insights data generates into the process to analyze, iterate, and improve.

When building your tech stack—no matter how complex—it is essential to plan tight integrations between systems and tools.
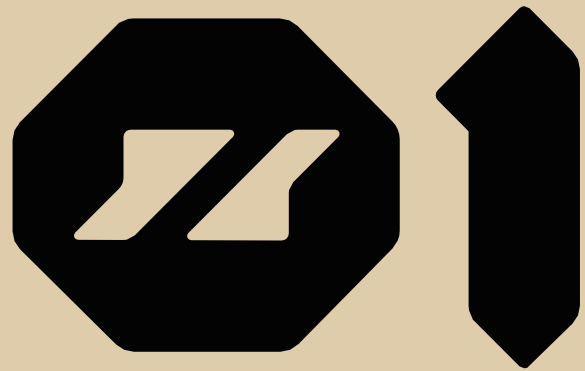
CRM
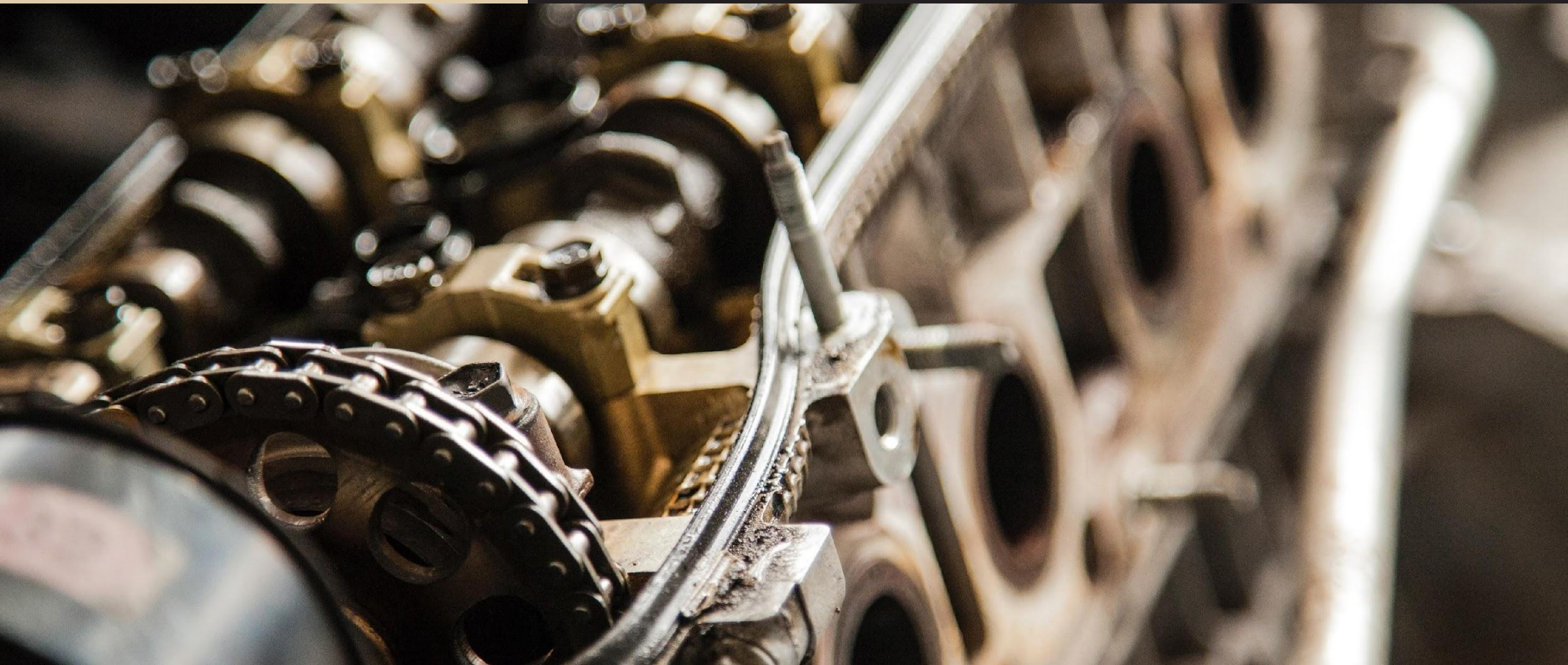
CRM

As the name suggests, a customer relationship management (CRM) is a platform for managing relationships with your customers. The software helps you keep track of existing customers, enhance customer relationships, improve customer retention, stay on top of sales and marketing efforts, automate communication.

But there's much more.

First designed to manage customer relations, CRMs have matured into incredibly complex systems with countless features designed to help companies and salespeople track and optimize their entire sales process. Their most common features nowadays include anything from data management to advanced lead scoring and automating repetitive tasks.

As a result, CRM systems have grown to be fully-fledged ecosystems, acting now as the backbone of any sales organization. Each of these ecosystems favors a set of tools and technologies, which may integrate more seamlessly than others. Consider this when selecting your CRM.

A company's first investment

For most companies, a CRM is the first and usually the most extensive investment they make in terms of sales technology. It has become so popular that 91 percent of companies over 11 employees utilize CRM software according to BuyerZone.

Today, most CRM solutions are SaaS platforms where you pay on a per-user, per-month basis. On-premise installations are seldom needed, as users can access most CRMs online in their internet browser. Some vendors charge a flat monthly fee for a set number of users, but require larger packages or extra fees for additional users.

There's a lot to think about when choosing your organization's CRM software. On the one hand, there are large vendors, such as Salesforce and Microsoft Dynamics, attempting to build ecosystems incorporating app marketplaces. On the other hand, there are some strong players in local markets designed for small and medium enterprises.

CRM

odoo

Odoo CRM

A powerful, open-source CRM that integrates seamlessly with Odoo's suite of business applications. It provides excellent flexibility, automation features, and strong pipeline management, making it a great choice for businesses looking for an all-in-one solution.

odoo.com

Dynamics 365

Dynamics 365

Dynamics 365 is a cloud-based enterprise resource planning and CRM system. Built by Microsoft for maximum flexibility and extensibility, it features a strong ecosystem and caters both small and medium-sized enterprises and large organizations.

dynamics.microsoft.com

monday.com

Monday.com

Monday.com prides itself on not just being a CRM system but an all-in-one operating system instead. Through its easy-to-use platform, monday.com offers businesses anything they could want in a workspace, be it project management, task management, or analytics.

monday.com

freshsales

Freshsales CRM

A full-fledged CRM software, offering lead scoring, built-in phone, email, and activity capture. Freshsales automatically enriches your leads, contacts, and accounts with their social and publicly listed information to save you the trouble of manually finding and entering the same information.

freshworks.com

CRM

HubSpot

HubSpot

HubSpot has established itself as an innovator in the sales and marketing scene. Its free CRM tracks customer interactions automatically–whether they're in an email, across social media, or ona call. Sync with Gmail or Outlook, and capture every call, email, or meeting as it happens.

hubspot.com/products/crm

pipedrive™

Pipedrive

Pipedrive offers very competitive pricing and a smooth user experience. The primary view is Pipeline, a clear visual interface that prompts you to take action, remain organized, and stay in control of a complex sales process.

pipedrive.com

attio

Attio

A modern, flexible CRM that combines customizable data management with sleek, user-friendly interfaces. Particularly popular among startups and SMBs, Attio excels in relationship-centric sales processes with collaborative features and real-time updates.

attio.com

ZOHO

Zoho CRM

With its cloud-based, integrated platform, Zoho CRM allows your sales team to spend more time selling instead of entering data with the help of workflow automation, lead scoring, real-time notifications and built-in gamification.

zoho.com

CRM

Salesforce

Salesforce is the most popular and often also the most expensive customer relation management solution in the world. Salesforce is more than just a CRM, it's an ecosystem with powerful App marketplace and almost unlimited number of integration options.

salesforce.com

Less Annoying CRM

Less Annoying CRM

Designed for small businesses, it offers simplicity and affordability, providing essential CRM features without unnecessary complexity.

lessannoyingcrm.com

In a nutshell

With thousands of vendors, the CRM space is crowded. Often the first investment into sales technology, choosing the right platform is a critical decision.

Sales technology is rapidly changing and CRMs are gaining new features by adding integrations with other apps and platforms. Make sure you pick one CRM that won't limit you down the road. Potential integrations are as important as the features of the CRM.

A CRM, however, isn't worth much without fresh, reliable data in it. Look into feeding real-time company data into your CRM to enrich and expand your database. Plugging Vainu into your CRM ensures your CRM is up to date with powerful company information that makes your salespeople more productive.

CRM: BONUS - STRONG PLAYERS IN THE NORDICS

Lime

Swedish Lime CRM contains everything users need for a simpler everyday life: contacts, history, to-do lists, case management, deals, and marketing activities.

lime-crm.se

Upsales

Swedish Upsales has developed a powerful all-in-one CRM and marketing automation software. Users get access to the information they need anytime and anywhere, with real-time notifications to keep them up-to-date when a new lead (or sale) comes in.

upsales.com

WebCRM

Danish WebCRM (part of Efficy) is a configurable, easy-to-use and highly secure cloud-based CRM system. It enables proactive account management and marketing—and through simplicity and clarity it leads to easier and faster results.
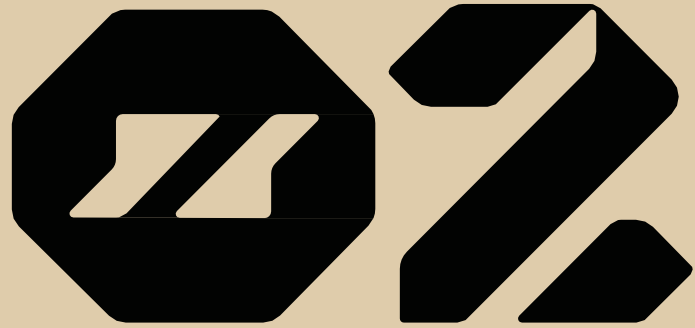
webcrm.com

SuperOffice CRM

Norwegian SuperOffice CRM ties all sales, marketing and customer service activities into a single, digital profile. A suite of integrated applications that give users customizable tools to boost productivity, improve customer relationships and help deliver information quickly to those who need it.

superoffice.com

Sales Intelligence and Prospecting

SALES INTELLIGENCE AND PROSPECTING

The sales intelligence vertical is still young and relatively undefined. This makes it far from easy for first-time buyers to compare sales intelligence solutions and decide which one is right for their business.

In a broad sense, sales intelligence refers to a wide range of technologies that help salespeople find, monitor, and understand information on prospects' and existing clients' daily business.

Sales intelligence helps salespeople know precisely who they should be talking with, what they should be talking about, and when they should reach out to them, and put all the relevant information in front of them when they're having that conversation. As a result, injecting data from a sales intelligence platform into your CRM can truly transform your sales process. A combination of company

insights and a clean and tidy CRM has the potential to create a well-oiled sales machine that delivers relevance at a scale.

In short, sales intelligence eliminates the previously manual process of locating the relevant insights you need, while verifying them for accuracy and giving you a complete overview of every prospect. Most tools come with notification features, alerting the users of organizational changes that can open up a window of opportunity, or informing them of when a new company falls into the description of their ideal customer profile.

In sales intelligence, local data plays a critical role, which makes the category more fragmented geographically than others. Legislation such as GDPR makes Europe, for example, a more challenging market to have contact information on.

Sales intelligence eliminates the previously manual process of locating the relevant insights you need, while verifying them for accuracy and giving you a complete overview of every prospect.

| SALES INTELLIGENCE AND PROSPECTING

dun & bradstreet

Dun & Bradstreet

Dun & Bradstreet has been helping businesses grow through the power of data, analytics, and data-driven solutions for almost 200 years. Their category-defining data, analytical insights, and end-to-end solutions guide businesses around the world to winning strategies and intelligent actions.

dnb.com

Lusha

Lusha

Lusha provides accurate B2B contact information with a focus on direct phone numbers and email addresses, integrating seamlessly with platforms like LinkedIn and Salesforce

lusha.com

clay

Clay

Clay is a dynamic sales intelligence platform that enables teams to build custom workflows, enrich prospect data in real-time, and automate personalized outreach, helping sales professionals connect with high-quality leads efficiently.

clay.com

Seamless.AI®

Seamless.ai

Seamless.AI is an advanced sales intelligence platform powered by artificial intelligence, delivering verified contact information, automating lead generation workflows, and integrating effortlessly with popular CRMs to enhance sales productivity and efficiency.

seamless.ai

| SALES INTELLIGENCE AND PROSPECTING

dealfront

Dealfront

Dealfront is a unique go-to-market platform tailored for businesses in Europe, combining the strengths of Echobot and Leadfeeder. It provides GDPR-compliant B2B data, aiding sales and marketing teams with comprehensive insights and tools for European market penetration.

dealfront.com

cognism

Cognism

With their globally compliant database of companies, contacts, and advanced filtering options, Cognism makes it easy for businesses to find target accounts of a specific size, industry, or tech stack.

cognism.com

Apollo.io

Apollo.io

Apollo offers a wide range of tools for prospecting, engaging, and driving revenue. It features a large B2B database with over 270 million contacts, providing users with detailed lead information and the ability to find and connect with potential customers.

apollo.io

LinkedIn Sales Navigator

LinkedIn Sales Navigator

Most salespeople use LinkedIn, but only some utilize LinkedIn's paid premium offering, Sales Navigator. This tool makes it easy to build prospect lists based on decision makers' job titles and responsibilities. Users can also monitor relevant discussions, allowing salespeople to find more meaningful ways to engage.

business.linkedin.com/sales-solutions/sales-navigator

| SALES INTELLIGENCE AND PROSPECTING

zoominfo

ZoomInfo

ZoomInfo is an all-in-one sales intelligence platform that helps you find and close your next customer before your competitors do. By uniting sales and marketing teams around a single source of truth, ZoomInfo provides the tools to identify high-value opportunities, automate tasks across outreach channels, and accelerate deal cycles.

zoominfo.com

VAINU

Vainu

Vainu helps salespeople and marketeers to have reliable, up-to-date company and contact data automatically updated in Salesforce, HubSpot, Pipedrive and Dynamics 365. Vainu's AI-based company profiling models help salespeople to build highly accurate microsegments. Its workflow triggers feature tracks relevant company changes and puts CRM tasks on autopilot.

vainu.com

In a nutshell

Sales managers and marketers are increasingly using data and insights from sales intelligence software to define and implement strategies. The need to combine external and internal data makes integrations a critical characteristic of any sales intelligence platform worth its salt.

With the addition of new datasets—such as real estate data, credit ratings, or vehicle information, intent data and trigger events are making prospecting more effective and specialized.

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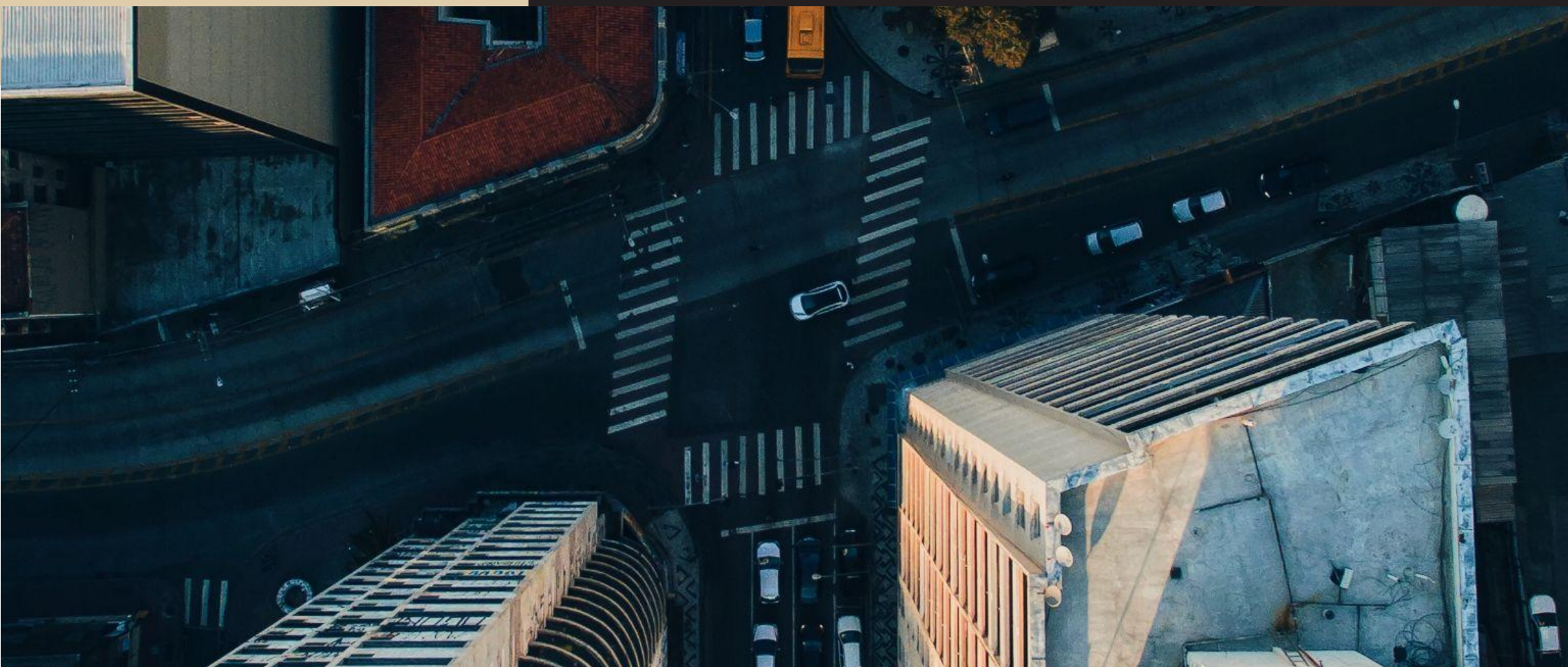
Sales Engagement

SALES ENGAGEMENT

B2B sales engagement tools are transforming the way sales teams interact with prospects and customers, enabling smarter, faster, and more personalized communication. These tools streamline the sales process by centralizing communication channels, helping teams stay organized and responsive throughout the buyer's journey.

One of the core benefits of these tools is the ability to automate outreach while maintaining a human touch. Features like automated follow-ups, cadences, and reminders ensure that no lead or opportunity is overlooked, while enabling sales reps to deliver timely, relevant messages that resonate with potential buyers.

Personalization is at the heart of effective sales engagement. These tools allow teams to customize communications at scale, tailoring messages based on data-driven insights into customer behaviors, preferences, and pain points.

This targeted approach significantly increases engagement rates and improves the likelihood of conversion. Tracking and analyzing sales activities is another key advantage. By monitoring email open rates, call outcomes, and meeting attendance, these tools provide valuable data that helps teams prioritize leads and refine their strategies. This visibility allows sales leaders to identify what's working and optimize performance in real time.

Sales engagement platforms also integrate seamlessly with CRM systems, ensuring that all interactions and updates are logged automatically. This unified view of customer data eliminates silos, enabling a more cohesive and collaborative approach to managing the sales pipeline.

B2B sales engagement tools aren't just about driving outreach—they're about creating meaningful, timely connections that move buyers forward.

SALES ENGAGEMENT

Salesloft

Salesloft is a comprehensive sales engagement platform that enables sales teams to execute multi-channel outreach, manage sales cadences, and gain insights through analytics, enhancing pipeline management and revenue growth.

salesloft.com

Outreach

Outreach is a robust sales engagement platform that automates and streamlines sales workflows, allowing teams to create personalized communication sequences, track prospect interactions, and utilize AI-driven insights to improve sales effectiveness.

outreach.io

HubSpot Sales Hub

HubSpot Sales Hub offers a suite of sales enablement tools, including email tracking, meeting scheduling, and customizable sales cadences, integrated within its CRM to help sales teams engage prospects efficiently and close deals faster.

hubspot.com/products/sales

Apollo.io

Apollo.io provides a sales engagement platform with features for prospecting, sequencing, and analytics, enabling sales teams to automate outreach, manage leads, and optimize their sales processes for better outcomes.

apollo.io

SALES ENGAGEMENT

heyreach

Heyreach

HeyReach is a multi-account sales engagement platform designed for LinkedIn outreach, enabling teams to automate campaigns, scale prospecting efforts, and increase response rates while staying compliant with platform limits.

heyreach.io

Smartlead.ai

Smartlead.ai

Smartlead.ai offers an AI-driven sales engagement tool that automates email outreach at scale, providing advanced personalization, deliverability optimization, and analytics to maximize open and reply rates.

smartlead.ai

Instantly

Instantly.ai

Instantly.ai is a sales engagement platform that focuses on cold email automation, helping teams generate leads with personalized email campaigns, deliverability tools, and performance tracking.

instantly.ai

lemlist

lemlist

Lemlist empowers sales teams with tools for personalized multichannel outreach, including email, LinkedIn, and video, enabling users to create engaging campaigns that drive higher conversion rates.

lemlist.com

SALES ENGAGEMENT

Reply

Reply.io

Reply.io is a sales engagement platform that automates multichannel outreach, including email, calls, and social touches, allowing sales teams to create personalized sequences and track engagement to improve response rates.

reply.io

zoominfo

Engage by Zoominfo

Engage by ZoomInfo is a sales engagement platform that combines outreach automation, multi-channel communication tools, and robust analytics, enabling sales teams to build effective cadences, engage prospects at scale, and drive revenue growth.

zoominfo.com/products/engage

In a nutshell

The future of B2B sales engagement tools is set to transform how sales teams interact with prospects and customers. These platforms will enable more efficient, data-driven outreach by automating multi-channel communication across email, calls, and social platforms, ensuring consistent and timely engagement at scale.

AI-powered insights will play a pivotal role, analyzing buyer behavior and engagement patterns to help sales teams tailor their messaging and approach. Predictive analytics will identify the best times, channels, and strategies for outreach, increasing the chances of meaningful interactions and conversions.
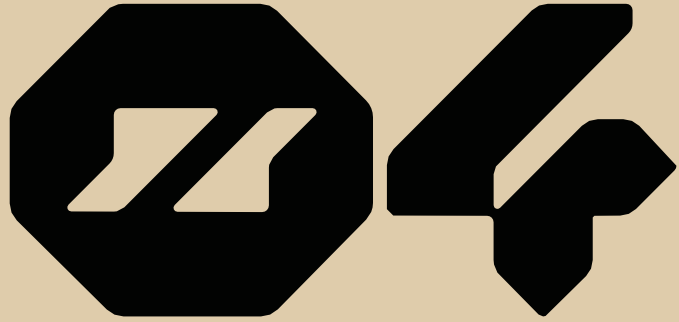
Sales Enablement & Digital Sales Room

SALES ENABLEMENT & DIGITAL SALES ROOM

We all have seen that transactional B2B sales is becoming more and more automated. Salespeople will allocate more of their time into larger opportunities where consultative approach, discovery meetings and tailored proposals play a bigger role. More people will get involved, both from the buyers and sellers' side.

With these larger sales processes, customer-facing digital portals and microsites will gain more traction. Parties can share relevant materials, chat with each other and craft custom proposals with prospective buyers. The goal is to strengthen the relationship already before the contract is signed by removing any buyer friction. These portals also allow sellers to track content that clients view and interact with, which can be highly useful when analysing which content creates the highest impact.

The software vendors that enable these portals and microsites come with different backgrounds. After G2 released digital sales room as a newly formed category, we have seen many sales enablement platforms and some e-Signature and document management providers rebranding themselves as DSR vendors. Nevertheless, salespeople will most likely find it useful when creating unique buying experiences for customers gets easier.

As the sales process becomes more and more complex, more people will get involved, both from the buyers and sellers' side.

SALES ENABLEMENT & DIGITAL SALES ROOM

Seidat

Seidat gathers the entire life cycle of slide decks in one app and makes it easy for businesses to manage their sales decks and proposal presentations. With its cloud-based slide deck platform, Seidat enables the creation of interactive slide decks for any occasion.

seidat.com

GetAccept

With their all-in-one platform, GetAccept provides users with the tools they need to close more deals, such as video messaging, document tracking, contract management, and e-signature.

getaccept.com

Allego

Allego helps businesses support and empower their employees through learning, content, and collaboration. With their data-driven platform, Allego provides a complete toolkit for businesses to optimize their employee training and drive sales team engagement, productivity, and performance.

allego.com

Showpad

With their comprehensive sales enablement platform, Showpad provides customer-facing teams with the required skills, knowledge, content, and tools to have impactful conversations with customers.

showpad.com

SALES ENABLEMENT & DIGITAL SALES ROOM

showell

Showell

Showell ensures that businesses' brands, products, or services always shine to their highest potential—whether online, in virtual meetings, or face to face. With its sales enablement platform, Showell makes storing, managing, and distributing sales and marketing content simple.

showell.com

HIGHSPOT

Highspot

With their intuitive platform, Highspot offers a unified solution that bridges the gap between strategy and execution, helping businesses deliver a unified buying experience.

highspot.com

Seismic

Seismic

Seismic helps businesses orchestrate content delivery across all channels and engage with prospective buyers at every step of the buyer journey. With their trademark Storytelling Platform™, Seismic helps align go-to-market teams and empowers them to deliver engaging buyer experiences.

seismic.com

Aligned

Aligned

Aligned offers a customer-facing collaboration platform that serves as a digital sales room and client portal, helping go-to-market teams orchestrate complex deals, increase buyer engagement, and drive revenue growth through a seamless and interactive experience.

alignedup.com

DIGITAL SALES ROOM

trumpet

Trumpet

Trumpet offers a digital sales room software designed to drive revenue. It features auto-personalized, collaborative, and trackable spaces that are created quickly for managing the entire buyer journey, from outreach to onboarding.

sendtrumpet.com

salesframe

Salesframe

Salesframe.com is a digital sales enablement platform designed to improve the efficiency and effectiveness of sales teams. It provides a centralized hub for sales materials, such as presentations, videos, and documents, ensuring easy access and up-to-date content for sales representatives.

salesframe.com

In a nutshell

In an increasingly complex and competitive marketplace, where buyers expect a greater amount of involvement and personalization, salespeople could sometimes use a helping hand, or tool, to ease the sales process and remove any potential points of friction.

Considering the amount of deals that don't materialize due to buyer friction, it's in a business' interest to do what it can to counteract that. The sales enablement and digital sales rooms softwares that we've listed should do just that—remove friction and enable your sales team to make more sales.
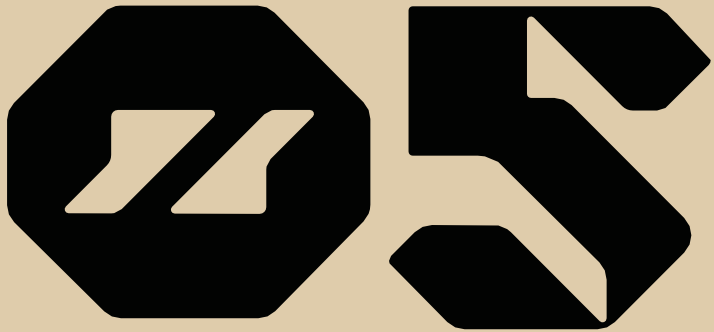
Marketing Automation

MARKETING AUTOMATION

The future of B2B marketing automation tools is set to revolutionize how businesses attract, nurture, and convert leads. These platforms will enable seamless, multi-channel campaigns by automating workflows across email, social media, and paid ads, ensuring consistent messaging and engagement at scale.

AI-powered insights will play a central role, analyzing customer behavior, content performance, and campaign data to optimize targeting and messaging. Predictive analytics will allow marketers to anticipate customer needs, delivering personalized content at the right time to boost engagement and conversions.

Automation will also streamline repetitive tasks like lead scoring, segmentation, and follow-ups, freeing marketers to focus on strategy and creativity. Enhanced integration with CRM systems will provide a unified view of customer journeys, helping teams deliver a cohesive and data-driven marketing experience.

Moreover, AI-driven tools will enable real-time performance monitoring, offering actionable recommendations to refine campaigns and maximize ROI. By automating complex workflows while ensuring personalization, these tools will help marketing teams build stronger, more meaningful connections with their audiences.

B2B marketing automation tools aren't just about efficiency—they're about driving smarter campaigns and delivering value at every touchpoint. They turn data into action, helping businesses connect and convert like never before.

MARKETING AUTOMATION

Marketo Engage

Adobe Marketo Engage

Adobe Marketo Engage is a robust marketing automation platform that streamlines lead management, enables personalized multi-channel campaigns, and offers advanced ABM capabilities. With powerful analytics and seamless integrations, it helps businesses scale marketing efforts and drive revenue growth.

business.adobe.com/products/marketo.html#

Intuit Mailchimp

Intuit Mailchimp

Intuit Mailchimp is a leading marketing automation platform that empowers businesses to create, automate, and optimize email campaigns. With tools for audience segmentation, multichannel marketing, and performance tracking, Mailchimp helps businesses deliver personalized messaging at scale, nurture customer relationships, and drive measurable growth.

mailchimp.com

salesforce pardot

Pardot

Pardot is Salesforce's marketing automation offering. The platform is feature-rich and provides powerful capabilities, especially for email marketing. Tailored for B2B companies, Pardot allows sales and marketing teams to create, deploy, and manage online marketing campaigns.

salesforce.com/marketing/b2b-automation/

HubSpot

HubSpot Marketing Hub

An all-in-one marketing automation platform offering tools for email marketing, social media management, and lead nurturing, with robust ABM features to personalize outreach for target accounts.

https://www.hubspot.com/products/marketing

MARKETING AUTOMATION

Apsis

Apsis automates businesses' customer journeys and helps them to grow their business. Through their marketing platform, Apsis offers businesses customizable workflows between sales and marketing that helps guide their customers toward the next conversion point.

apsis.com

Act-On

Act-On's adaptive marketing platform is a command center to get the right messages, to the right people, at the right time. Act-On provides users insight to adapt to their customers' unique needs at each stage of the buying journey and accelerate their lead to revenue.

act-on.com

Oracle Marketing Cloud

Many software giants provide their own marketing cloud offerings these days, and Oracle is no exception. Oracle acquired Eloqua, is an interesting option for large and medium-sized companies, especially if they already rely on Oracle products and services.

https://www.oracle.com/cx/marketing/

ActiveCampaign

ActiveCampaign helps growing businesses meaningfully connect and engage with their customers. With their SaaS platform, the team at ActiveCampaign aim to help companies go beyond marketing automation to optimize their customers' experiences.

activecampaign.com

MARKETING AUTOMATION

Constant Contact

Constant Contact

Constant Contact provides companies with a one-stop shop for everything they need to start their business online from email marketing, building a website or setting up an online store to social marketing campaigns. Everything is on the same platform.

constantcontact.com

keap

Keap

Keap is a marketing automation and CRM platform for small businesses, offering tools for email marketing, lead management, and pipeline tracking. With automated follow-ups and personalized outreach, it helps businesses streamline workflows, nurture relationships, and scale their marketing and sales efforts effectively.

keap.com

In a nutshell

B2B marketing automation tools simplify and optimize complex marketing workflows, enabling businesses to scale personalized, multi-channel campaigns. These tools integrate capabilities like lead nurturing, segmentation, and behavioral tracking, helping marketers deliver timely and relevant content to drive conversions.

Looking ahead, we anticipate advancements in AI-driven insights, deeper personalization, and seamless integration with CRM systems for a unified customer view. Marketing automation will become more industry-specific, offering tailored solutions for niche markets.

Ultimately, the convergence of behavioral data (automation), customer insights (CRM), and external signals (sales intelligence) will be crucial for delivering targeted, high-impact campaigns in modern B2B marketing.
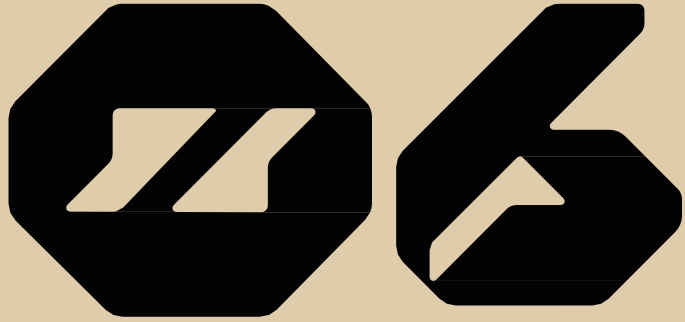
VAINU

Account-Based Sales & Marketing

ACCOUNT-BASED SALES & MARKETING

Account-based sales and marketing tools are reshaping how business engage with high-value accounts. These platforms enable teams to identify, target, and nurture specific accounts with tailored strategies, ensuring more personalized and impactful outreach. By leveraging account intelligence, sales and marketing teams gain deep insights into company needs, decision-makers, and buying signals, allowing for hyper-targeted campaigns.

Automation and data integration are key drivers of success in account-based approaches. Tools now combine customer data (CRM), behavioral insights (marketing automation), and external company intelligence to build a complete picture of target accounts. This integration streamlines collaboration between sales and marketing teams, aligning efforts and ensuring consistency across touchpoints.

Account-based advertising is another critical feature, allowing businesses to deliver highly personalized content and ads to the right people at the right accounts. AI-powered tools further enhance the process, predicting account behavior, prioritizing outreach, and optimizing engagement strategies in real time.

As these tools evolve, we'll see more specialized solutions for industry-specific account-based strategies, as well as holistic platforms that bring together targeting, engagement, and measurement into a unified ecosystem

Account-based sales and marketing tools go beyond traditional lead generation—they empower teams to align, personalize, and win high-value accounts with precision and impact.

ACCOUNT-BASED SALES & MARKETING

6sense

6sense

6sense's account-based orchestration platform helps revenue teams know everything they need to know about their buyers so they can easily do anything they need to do to generate more opportunities, increase deal size, get into opportunities sooner, compete and win more often.

6sense.com

MADISON LOGIC.

Madison Logic

Madison Logic's platform helps users convert their best accounts faster by finding and engaging with the most influential individuals throughout the buyer journey. It brings sales and marketing together with buyer insights and journey optimization to make every interaction a meaningful one.

madisonlogic.com

Demandbase

Demandbase

One of the pioneers in the account-based marketing space. The platform offers several different modules for advertising, marketing, sales, and analytics. Every module is account- based which means, for example, that it delivers targeted advertising to the companies and job titles that matter most.

demandbase.com

demandscience

DemandScience

DemandScience, now merged with Terminus, operates as a powerful ABM and data insights platform, leveraging advanced tools to identify high-value accounts, deliver personalized campaigns, and measure marketing success, enabling seamless collaboration between sales and marketing teams.

demandscience.com

ACCOUNT-BASED SALES & MARKETING

RB2B

RB2B is an account-based marketing platform that identifies anonymous website visitors and pushes their LinkedIn profiles to Slack in real time. Focused on U.S.-based visitors, RB2B enables precise targeting without GDPR constraints, helping businesses prioritize high-value accounts and drive measurable pipeline growth.

rb2b.com

Keyplay

Keyplay helps businesses build trusted ICP models using transparent, inspectable data to identify and prioritize the right accounts. It enables sales and marketing teams to quickly find, replicate, and engage their best-fit accounts while tracking account signals for smarter growth.

keyplay.io

Fibbler

Fibbler helps businesses identify influenced deals from LinkedIn Ads impression data, providing insights into how ad engagement impacts pipeline and revenue. By turning LinkedIn engagement data into actionable intent signals, Fibbler empowers teams to optimize their ABM programs and drive targeted account growth.

fibbler.co

Factors.ai

Factors.ai combines ABM and marketing analytics, offering actionable insights into account-level activity, intent signals, and campaign performance to optimize targeting and drive measurable revenue outcomes.

factors.ai

ACCOUNT-BASED SALES & MARKETING

RollWorks

RollWorks

RollWorks is an account-based marketing (ABM) platform that helps businesses identify target accounts, deliver personalized campaigns, and measure performance. It enables marketing and sales teams to align efforts and drive revenue by focusing on high-value accounts.

rollworks.com

N.Rich

N.Rich

N.Rich is an ABM platform that combines account-based advertising with advanced intent data, helping businesses identify high-value prospects, deliver hyper-targeted campaigns, and measure their impact on pipeline and revenue growth. Its robust analytics and account tracking capabilities make it a powerful tool for scaling ABM programs.

nrich.io

In a nutshell

Account-based sales and marketing tools unify data, insights, and outreach to engage high-value accounts with tailored, multi-channel strategies. They integrate CRM, marketing automation, and account intelligence, aligning sales and marketing teams to drive personalized engagement. Moving forward, we'll see solutions that are both holistic and industry-specific, delivering deeper insights, stronger collaboration, and measurable growth for account-focused strategies.

VAINU
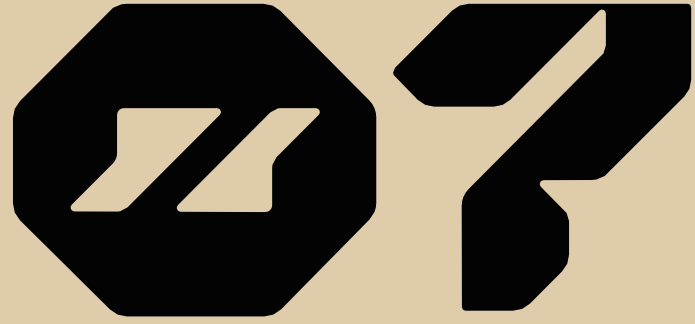
Revenue Operations Platforms

REVENUE OPERATIONS PLATFORMS

Revenue Operations (RevOps) platforms are transforming how businesses align their sales, marketing, and customer success teams to drive predictable revenue growth. These tools centralize data, workflows, and performance insights, breaking down silos and creating a unified view of the customer journey.

A core feature of RevOps platforms is data integration. By consolidating data from CRMs, marketing automation, sales engagement tools, and customer success platforms, businesses can gain a holistic understanding of their revenue streams. This enables teams to identify bottlenecks, forecast accurately, and optimize processes across the entire revenue funnel.

Automation is another key component, streamlining processes like pipeline management, reporting, and revenue forecasting. By automating these tasks, RevOps tools free teams to focus on strategy and execution while improving operational efficiency.

Advanced analytics and AI further elevate these platforms, providing actionable insights into key metrics like lead conversion, churn rates, and sales performance. Predictive analytics help teams make data-driven decisions and adjust strategies in real time to maximize growth.

Moving forward, RevOps tools will become even more sophisticated, offering deeper integrations, AI-powered optimizations, and tailored solutions for specific industries, ensuring businesses can scale revenue operations seamlessly and efficiently.

Revenue Operations platforms unite teams, tools, and data to drive predictable growth, streamline processes, and unlock actionable insights that fuel revenue efficiency.

REVENUE OPERATIONS PLATFORMS

Aviso

Aviso is an AI-powered revenue intelligence platform that uses advanced machine learning to provide predictive analytics, deal insights, and forecast accuracy, enabling sales teams to optimize revenue operations and make informed decisions.

aviso.com

Creatio

Creatio is a no-code platform that integrates customer relationship management (CRM) and workflow automation, enabling businesses to unify sales, marketing, and customer service operations for enhanced revenue growth.

creatio.com

Clari

Clari offers an AI-driven revenue operations platform that provides comprehensive sales analytics, pipeline management, and revenue forecasting tools. It enables businesses to identify risks, optimize deal execution, and align sales, marketing, and customer success teams to drive predictable and scalable revenue growth.

clari.com

Salesforce Revenue Cloud

Salesforce Revenue Cloud provides a comprehensive suite of tools to manage the entire revenue lifecycle, including sales, billing, and revenue recognition, facilitating seamless alignment across departments.

https://www.salesforce.com/eu/form/cpq/demo-revenue-cloud/

REVENUE OPERATIONS PLATFORMS

INSIGHTSQUARED
A Mediafly Company

InsightSquared

InsightSquared helps revenue operations professionals make better decisions by equipping them with actionable, real-time intelligence on sales and marketing KPIs.

insightsquared.com

HubSpot

HubSpot Operations Hub

HubSpot Operations Hub is a versatile platform that unifies and streamlines data across sales, marketing, and customer service teams, offering tools for data syncing, automation, and reporting to improve alignment and drive efficient revenue operations.

https://www.hubspot.com/products/operations

Revenue Grid

Revenue Grid

Revenue Grid is a guided revenue operations platform that leverages AI to provide sales teams with actionable insights, automated workflows, and revenue intelligence, helping businesses optimize pipeline management and drive predictable growth.

revenuegrid.com

DEAR LUCY

Dear Lucy

Dear Lucy provides a vast library of ready-made sales and revenue metrics for Salesforce, HubSpot, and Pipedrive along with various customization options. Dear Lucy calculates key sales and revenue metrics, compares performance to targets, shows historical trends, and calculates automated forecasts.

dearlucy.co

REVENUE OPERATIONS PLATFORMS

BoostUp

BoostUp is a revenue operations and intelligence platform that combines AI-driven forecasting, pipeline management, and activity tracking to provide actionable insights, improve sales efficiency, and drive predictable revenue growth.

boostup.ai

Weflow

Weflow is a revenue workspace designed to streamline Salesforce data management, enable structured pipeline updates, and provide actionable insights, helping sales teams improve productivity and optimize revenue operations.

getweflow.com

Dreamdata

Dreamdata is a B2B revenue attribution and pipeline analytics platform that connects marketing and sales activities to revenue outcomes, enabling businesses to analyze and optimize their entire revenue generation process with data-driven insights.

dreamdata.io

Gong.io

Gong.io is an advanced revenue intelligence platform that uses artificial intelligence to analyze sales conversations across phone, email, and web conferencing, providing insights to improve team productivity and revenue predictability.

gong.io

REVENUE OPERATIONS PLATFORMS

Revenue.io

Revenue.io is an AI-powered revenue operations platform that integrates conversation intelligence, real-time coaching, and workflow automation to help sales and marketing teams optimize performance, improve engagement, and drive scalable revenue growth.

revenue.io

HockeyStack

HockeyStack's platform focuses on tracking user behavior and engagement, helping companies understand and improve their customer journey. They offer a range of tools for data analysis, conversion rate optimization, and personalized marketing strategies.

hockeystack.com

In a nutshell

Revenue Operations platforms integrate data, processes, and teams across sales, marketing, and customer success to optimize revenue growth. By automating workflows, centralizing data, and delivering AI-driven insights, these tools enable businesses to forecast accurately, streamline operations, and scale efficiently.

The future of RevOps lies in deeper integrations and predictive analytics, empowering teams to collaborate effectively and make data-driven decisions that drive sustainable growth.

VAINU

Customer Success

CUSTOMER SUCCESS

Customer success software is used by businesses to ensure customers achieve the outcome that they expect to achieve as they use the business' product or service. In other words, optimizing customer relationships and ensuring that the customer achieves success. Customer success initiatives are vital for the preservation and expansion of revenue, as well as boosting customer advocacy and helping sustaining profitability and growth.

The software provides businesses with a detailed analysis of customers' past behavior and a "health score" that estimates their level of satisfaction.

Moreover, customer success solutions will help businesses build or identify customer profiles, capture customer data, history, and feedback, engage customers throughout the lifecycle, provide feedback and customer success scores, and predict future customer growth or red flags.

This helps businesses in identifying any dissatisfied customers, setting appropriate tasks into motion, and increasing customer retention rates. Additionally, more often than not, customer success software will integrate with CRM software, help desk software, and social media management software tools, making it easier for businesses to gather their data in the place where they need it most.

Whether you're choosing your customer success solution based on your existing techstack or as a standalone solution, we've compiled a list for you to look into.

Customer success initiatives are vital for the preservation and expansion of revenue, as well as boosting customer advocacy and helping sustaining profitability and growth.

CUSTOMER SUCCESS

Planhat

Planhat helps businesses increase their customer lifetime value by placing an emphasis on the customer. With their customer data platform, Planhat allows businesses to effectively structure, manage, and interact with their customer data.

planhat.com

ChurnZero

ChurnZero helps businesses fight customer churn. With ChurnZero's customer success platform, businesses can easily understand how their customers use their product, assess their health and likelihood to renew, and automate and personalize the customer experience.

churnzero.com

Startdeliver

Startdeliver's customer success platform displays usage health, feedback, support overview, renewals, and all the customer data businesses need to be proactive.

startdeliver.com

Gainsight

Gainsight is a purpose-built platform designed for delivering customer success for customer- driven enterprises. This is a powerful platform built to turn disparate customer data from multiple sources into insights and actions that drive measurable business outcomes for users/clients.

gainsight.com

CUSTOMER SUCCESS

ZapScale

ZapScale is an AI-powered customer success platform that helps businesses manage customer health, automate engagement workflows, and deliver actionable insights, enabling proactive customer support and fostering long-term relationships to reduce churn and increase retention

zapscale.com

Vitally

Vitally helps companies create excellent customer experiences by providing the customer success teams with analytics, automation, and project management capabilities.

vitally.io

Churn360

Churn360.com focuses on reducing customer churn and improving retention rates for businesses. It utilizes advanced analytics and machine learning algorithms to identify at-risk customers and understand the factors contributing to churn.

churn360.com

ClientSuccess

The ClientSuccess Customer Success Management Platform™ is a comprehensive client management platform that provides companies with actionable insights and customer analytics through a variety of features.

clientsuccess.com

CUSTOMER SUCCESS

Totango

Totango is a customer success platform that helps recurring revenue businesses simplify the complexities of customer success by connecting the dots of customer data, actively monitoring customer health changes, and driving proactive engagements.

totango.com


Freshdesk Customer Success

Freshdesk Customer Success is a comprehensive management platform designed to help B2B companies maximize customer value by monitoring health scores, automating workflows, and providing actionable insights, enabling businesses to proactively engage with customers, reduce churn, and drive long-term growth.

freshworks.com

In a nutshell

With their wide range of features, customer success software makes it easy for businesses to centralize all of their customer data and develop a 360-degree view of them, helping to decrease customer churn, increase customer satisfaction, and increase upsell opportunities.

Through customer success softwares, businesses are able to accurately assess the satisfaction of their customers and take action if necessary. This helps to ensure that the business is able to do the thing that matters just as much, if not more than, capturing new customers—retaining those customers.
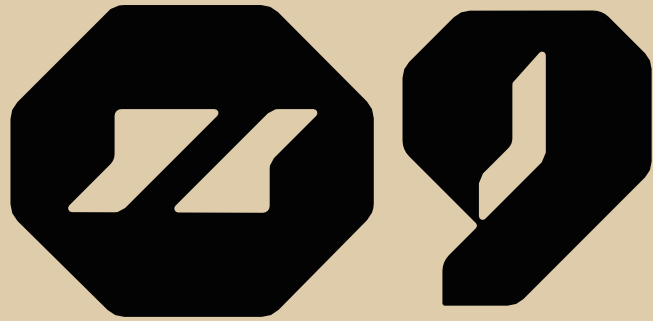
Data Connectors and Integrations
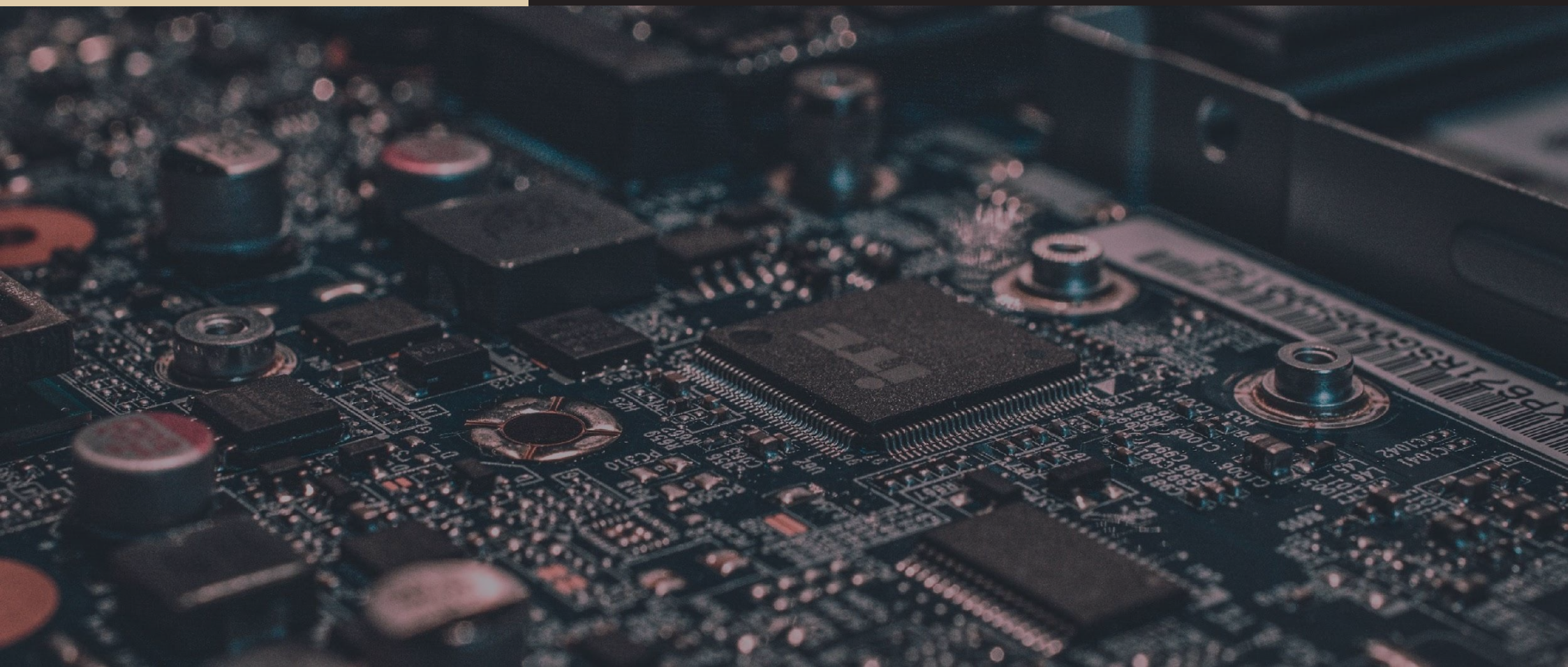
DATA CONNECTORS AND INTEGRATIONS

The increasingly digitized world that we're living in has a multitude of fantastic tools that can help make our lives easier. A downside of this wide range of different tools is that they are often independent and not easily accessible from a single system. It's here that data connectors and integrations come in handy.

A data connector is a tool that connects different systems so that data can be moved between them. This means that the data is accessible through a single system, which is a significant quality-of-life improvement.

Data integration tools are slightly different in that they work to combine data from different sources into a single system instead of simply allowing the movement of data between systems.

We've scoured the market, searched high and low, and found you a list of data connector and integration tools so that you don't have to.

Data connectors connect different systems so that data can be moved between them. Data integration tools combine data from various sources into a single system.

DATA CONNECTORS AND INTEGRATIONS

Supermetrics

Supermetrics is a data integration platform that centralizes sales and marketing data by connecting CRMs and ad platforms to destinations like Google Sheets, Excel, and data warehouses. With its extensive connector library, it simplifies reporting and analytics, helping teams make data-driven decisions efficiently.

supermetrics.com

Airbyte

Airbyte is an open-source data integration platform that helps businesses centralize all their customer data. With the industry's largest catalog of off-the-shelf sales and customer success connectors, Airbyte enables seamless data syncing and integration, offering flexibility and scalability for managing B2B sales workflows.

airbyte.com

Zapier

Zapier is a no-code automation platform that connects sales tools, CRMs, and other business apps, enabling seamless data transfer and workflow automation. By integrating various platforms, Zapier helps sales teams eliminate manual tasks, improve efficiency, and streamline their operations.

zapier.com

Fivetran

Fivetran is a fully automated data integration platform that centralizes sales data from CRMs, marketing tools, and other sources into data warehouses. With pre-built connectors and real-time syncing, it simplifies data consolidation and enables teams to focus on analytics and decision-making instead of manual data management.

fivetran.com

DATA CONNECTORS AND INTEGRATIONS

workato

Workato

Workato is an enterprise automation platform that optimizes sales processes by integrating applications and automating workflows. It streamlines lead management, opportunity tracking, and order processing, enhancing efficiency and accuracy across sales operations.

workato.com

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tray.io

Tray.io

Tray.io is a leading integration and automation platform designed to help businesses connect and automate their various cloud-based applications and services. With Tray.io, organizations can create and manage complex workflows, enabling seamless data flow between different software tools, databases, and APIs.

tray.io

In a nutshell

Even when businesses have access to all of the data and tools that they could possibly require, they run headfirst into another challenge—that data is scattered across numerous platforms and solutions. This decreases usability and makes it more difficult to access in real time.

If that's a problem that your organization has encountered, data connectors and integrations, like the ones listed, could be worth looking into, as they make it easy for businesses of all sizes to centralize the wide range of tools and data that they have access to and avoid drawn-out and expensive data projects.

VAINU
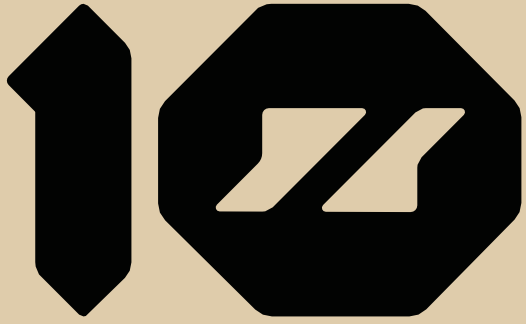
CPQ and Quote Management Software

CPQ AND QUOTE MANAGEMENT SOFTWARE

Configure, price, quote (CPQ) software helps companies automate the lifecycle of the quoting and proposal process, starting with the moment a customer supplies their needs in a company's offering and ending with sending a detailed quote to the customer or prospect. CPQ software is used in sales departments to accelerate the sales process while improving quote accuracy and customer relations. These software products allow companies to determine a customer's needs and provide them with custom quotes that best fit those specific needs. Products are typically built on an existing CRM software product or designed to integrate with one (or more) CRM tools.

As companies and their product/service lists grow, it becomes increasingly difficult to manage product pricing, identify great upsell opportunities, and keep track of

deals being offered by your competition. On top of this, sales reps aren't given up-to-date pricing information on their products, leading to lost opportunities and slower quote times. Configuring a quote can be a time consuming task, especially when critical data is not easily accessible in real time.

CPQ software eliminates these problems. Sales cycles are faster, pricing data is far more accurate, and opportunities to upsell and bundle are captured more frequently. At the same time, a company can prepare orders faster without increasing the potential for error. And lastly, because pricing data is more streamlined, workflow is streamlined, time is saved and more sales can be made.

Whether you're choosing a CPQ solution built on your existing CRM software or a standalone solution, we've gathered a list of great options for you.

For growing companies, it becomes increasingly difficult to manage product pricing, identify great upsell opportunities, and keep track of deals being offered by your competition.

CPQ AND QUOTE MANAGEMENT SOFTWARE

DealHub

DealHub CPQ offers an intuitive and flexible platform for configuring products, automating pricing, and generating quotes. It integrates seamlessly with CRMs, enabling sales teams to streamline the quote-to-cash process and improve deal velocity.

dealhub.io

Proposify

Proposify helps businesses take control and gain insight into the most important stage of their sales process—closing. Through its proposal software, Proposify gives teams the confidence and flexibility to dominate deals from design to sign-off.

proposify.com

PandaDoc

PandaDoc speeds up businesses' sales cycles and increases their close rates. With its CPQ software, PandaDoc improves sales teams' productivity, enhances the customer experience, and saves time by making it simple to create and implement workflows.

pandadoc.com

Vloxq

Vloxq eliminates manual, repetitive tasks and gives businesses the time to focus on increasing customer satisfaction and profitability instead. With its CPQ solution, vloxq removes the fuzz of creating proposals and simplifies the process for businesses.

vloxq.com

CPQ AND QUOTE MANAGEMENT SOFTWARE

Conga CPQ

Conga CPQ enables businesses to streamline product configuration, pricing, and quoting processes while improving accuracy and compliance. Its integration with CRMs ensures seamless data flow and improved sales efficiency.

conga.com/products/conga-cpq

Subskribe

Subskribe integrates CPQ, subscription billing, and revenue recognition into a single unified platform. The platform emphasizes fast implementation, ease of use, and cost-efficiency, supporting businesses in scaling from startup phase to IPO with minimal operational disruption.

subskribe.com

Salesforce CPQ

Salesforce CPQ is a comprehensive solution that streamlines the quoting process with features like guided selling, automated pricing, and discount approvals. It integrates seamlessly with Salesforce CRM, enabling sales teams to create accurate quotes faster.

salesforce.com/sales/cpq/

HeadQ

HeadQ is a Visual CPQ platform tailored for manufacturers, enabling digital commerce for complex B2B products. Its Visual Configurator allows customers to configure products, calculate price estimates, and request quotes or make purchases directly from your website, transforming it into a powerful sales channel and streamlining the buying process.

headq.io

CPQ AND QUOTE MANAGEMENT SOFTWARE

Qwilr

Qwilr

Qwilr empowers businesses to stand out from the competition and deliver world-class buyer experiences. With their web-based software, Qwilr helps businesses create the perfect proposal, pitch, and sales quote, so that they can seal every deal.

qwilr.com

HubSpot

HubSpot CPQ

HubSpot CPQ streamlines the configure, price, and quote process by integrating with HubSpot's Smart CRM, enabling sales teams to build accurate quotes and extract deal data effortlessly. With eSignature integrations and native payments, it simplifies the buying process and accelerates deal closures.

hubspot.com/products/sales/cpq

In a nutshell

With businesses generally having an increasing amount of personalization available in their product catalog, buyers increasingly having particular specifications for their purchases, and sales representatives not necessarily having the required access, or knowledge, to effectively create quotes, CPQ software is a boon.

Through automation, businesses can make the quotation process faster and more accurate, as well as making it easier for their sales teams, simplifying their sales process and freeing up time for them to focus on a more important aspect of sales—customer interaction.

11

Conversation Intelligence

CONVERSATION INTELLIGENCE

Conversation intelligence tools are revolutionizing how sales and customer success teams capture, analyze, and act on insights from customer interactions. By recording and transcribing calls, meetings, and other conversations, these tools provide teams with valuable data to improve performance, identify opportunities, and align strategies.

AI-powered analytics go beyond simple transcription, uncovering key trends such as customer pain points, competitive mentions, and buying signals. These insights help sales teams refine their messaging, improve objection handling, and prioritize follow-up actions effectively.

Coaching is another critical benefit. Conversation intelligence platforms analyze individual and team performance, highlighting areas for improvement and delivering actionable feedback. This data-driven approach to training helps sales leaders scale best practices across their teams.

Furthermore, integrating these tools with CRM systems ensures that conversation data is automatically logged, creating a seamless flow of information for tracking deals and customer journeys. As these platforms evolve, real-time analytics and AI-driven recommendations will make customer interactions even more impactful, improving engagement, conversion rates, and team productivity.

Conversation intelligence tools turn customer interactions into actionable insights, helping teams improve performance, refine messaging, and drive more successful outcomes.

CONVERSATION INTELLIGENCE

zoominfo

Chorus by ZoomInfo

Chorus transcribes and analyzes sales calls and meetings using advanced AI, enabling teams to track customer sentiment, engagement trends, and conversation highlights to enhance decision-making and coaching.

zoominfo.com/products/chorus

Avoma

Avoma

Avoma combines AI-driven meeting transcription and analysis with collaborative tools, allowing teams to extract actionable insights, improve collaboration, and streamline follow-up activities across departments.

avoma.com

Clari

Clari Co-Pilot

Clari Copilot provides AI-powered conversation intelligence capabilities that deliver real-time insights into customer interactions, enabling teams to identify key opportunities and streamline sales processes.

clari.com/products/copilot/

GONG

Gong.io

Gong is a conversation intelligence platform especially designed for salespeople. It captures all the sales conversations, phone calls, web conferences, and email. Gong then uses artificial intelligence to uncover the stuff won deals are made of.

gong.io

CONVERSATION INTELLIGENCE

Fireflies.ai

Fireflies.ai offers automated transcription, search, and analysis for meetings, helping teams capture critical details, organize conversations, and drive informed collaboration with AI-driven insights.

fireflies.ai

Outreach (powered by Kaia™)

Outreach, powered by KAIA (Knowledge AI Assistant), enhances conversation intelligence by delivering real-time insights during calls, providing next-best action recommendations, and offering comprehensive post-call analytics for improved sales effectiveness.

outreach.io

Salesloft

Salesloft is a sales engagement platform that helps sales teams execute effective selling process by targeted, personalized communications at scale. The platform includes features such as real-time email tracking, an integrated sales dialer and AI-assisted conversation intelligence.

salesloft.com

Jiminny

Jiminny empowers sales teams with conversation intelligence and coaching features, enabling them to analyze calls, identify improvement areas, and enhance overall sales performance with actionable insights.

jiminny.com

| CONVERSATION INTELLIGENCE

FATHOM

Fathom

Fathom's conversation intelligence tools analyze customer interactions to uncover key insights, helping sales teams refine their approaches and create tailored engagement strategies to drive success.

fathom.video

Otter.ai

Otter.ai provides AI-powered transcription and meeting collaboration tools, enabling seamless capture, sharing, and analysis of conversation data to enhance productivity and decision-making.

otter.ai

In a nutshell

Conversation intelligence tools capture and analyze customer calls and meetings to provide actionable insights. By leveraging AI, they uncover trends, improve coaching, and enhance sales performance.

Seamlessly integrating with CRMs, these tools optimize messaging, highlight key opportunities, and streamline follow-ups. As they evolve, real-time recommendations and advanced analytics will further empower teams to drive engagement and accelerate revenue growth.

12. e-Signature and Document Tracking

E-SIGNATURE AND DOCUMENT TRACKING

Digital signature technology has been around for decades, but only in the last few years, sales organizations have truly gone paperless.

In a nutshell, an e-signature is a digital way of putting pen to paper. E-signature and document tracking software provide users with the ability to securely collect signatures on electronic records, such as sales contracts and proposals.

This type of software helps streamline administrative tasks and reduce overhead by providing a single, unified view of each contract's processes. An additional benefit of e-signature technology is that it allows for a paperless office. The sheer amount of space that paper documents and files take up is problematic on several levels.

Many solutions focusing in this area offer the possibility to track in real-time when and how a prospect interacts with a specific document. Some salespeople call up the decision-maker when they receive a notification about a prospect opening up a proposal.

> **Many solutions focusing in this area offer the possibility to track in real-time when and how a prospect interacts with a specific document.**

The majority of e-signature and document tracking platforms provide users with notifications for critical dates that affect a contract, such as the cut-off date for contract renewal. Some more low-end services only offer templates that allow users to create and store their contracts. Other more advanced software provide tools for creating and managing contracts electronically and automating the digital management of a contract throughout its lifecycle. Many vendors integrate with third-party applications such as CRMs.

Lately, the market has started to see more e-signature and document tracking solutions pointed for sales teams. These tools can be useful also for sending out any sales and marketing collateral.

To help you find the right vendor for your needs, we have collected the ten top tools in this category.

E-SIGNATURE AND DOCUMENT TRACKING

Adobe Sign

Adobe Sign

Adobe Sign is one of the top e-signature solutions that lets users send, sign, manage, and store documents and forms with trusted, legal electronic signatures. It also enables process tracking from web and mobile devices as well as inside applications used every day.

adobe.com/sign/

Contractbook

Contractbook

Contractbook provides a collaborative contract automation tool that enables businesses to create, sign and store all their contracts digitally.

contractbook.com

DocuSign

DocuSign

DocuSign is one of the most popular e-signature solutions. It mainly targets larger enterprises, and offers seamless integrations with Microsoft, Salesforce, and Google products that allow users to sign documents without exiting out of the aforementioned platforms.

docusign.com

Jotform SIGN

Jotform Sign

Jotform Sign is a free e-signature software that enables users to create, share, and e-sign documents in minutes. With the ability to automate workflows and support signatures on any device, Jotform Sign simplifies document management for businesses of all sizes.

jotform.com/products/sign/

E-SIGNATURE AND DOCUMENT TRACKING

oneflow

Oneflow

Oneflow is an intuitive all-in-one e-contract platform designed to speed up the last mile of your sales, hiring, and buying process. Oneflow has developed a powerful contract editor for live editing, chat, video and a whole bunch of other smart functions.

oneflow.com

PandaDoc

PandaDoc

PandaDoc all-in-one software streamlines sales workflows and provides transparency into the performance of proposals and contracts. Sales teams can design, approve, send, track, and e-sign documents. An insightful dashboard provides sales leaders with real-time progress and accurate reporting.

pandadoc.com

PENNEO

Penneo

With Penneo you can handle the entire signature flow digitally. Users can sign utilizing any national e-ID system (BankID, NemI). Penneo is based on European (eIDAS) and American (ESIGN) standards. This means that a digital signature from Penneo is valid all over the world.

penneo.com

signNow

SignNow

SignNow.com is an online platform offering electronic signature solutions that enable users to sign, send, and manage documents digitally. It streamlines document workflows for businesses of all sizes, enhancing efficiency by eliminating the need for physical paperwork.

signnow.com

E-SIGNATURE AND DOCUMENT TRACKING

scrive.

Scrive

Scrive enables remote sales and remote workers with secure, legally-binding electronic signature solutions.Electronic signatures and identity verification can happen through a dedicated online portal or directly from your web browser, office system, or CRM.

scrive.com

Dropbox Sign

Dropbox Sign

Dropbox Sign (formerly HelloSign) is an easy-to-use eSignature platform that allows users to sign, send, and manage documents securely. With seamless integration into Dropbox, Google Workspace, and other tools, it streamlines workflows, ensures compliance, and enhances productivity for businesses of all sizes.

sign.dropbox.com

In a nutshell

New data protection laws and the GDPR restrictions are making it more difficult to track when and how a prospect interacts with a document. When selling to prospects based in any of the EU's member states, the GDPR framework must be taken into account before switching on document tracking.

Besides digital signature options, vendors are focusing a lot more on collaboration throughout the whole process, and including chat capabilities, document tracking, predictive analytics, and other features. Expect all document-related collaboration to soon happen within the proposal software itself, to ensure a speedier process.

13

Sales Productivity & Copilots/AI Agents

SALES PRODUCTIVITY & COPILOTS/AI AGENTS

Sales productivity tools and AI-powered copilots are transforming the way sales teams operate, enabling them to work smarter, faster, and more efficiently. These tools act as intelligent assistants, automating time-consuming tasks like note-taking, CRM updates, and follow-up reminders, allowing sales professionals to focus on high-value activities like closing deals and building relationships.

AI copilots go beyond basic automation by providing real-time support during sales interactions. They deliver insights, suggest talking points, and help overcome objections, ensuring reps stay on track and maximize every conversation. Additionally, these tools analyze data to prioritize leads, recommend next steps, and forecast opportunities.

Integration with CRMs and other sales tools ensures a seamless flow of information, while AI-driven analytics uncover patterns and trends that boost team performance. With continuous learning, these copilots improve over time, providing increasingly precise recommendations that help sales reps meet and exceed their targets.

Looking ahead, sales productivity tools will become even more intuitive and proactive, leveraging advanced AI to act as true strategic partners for sales teams, streamlining workflows and enhancing decision-making.

AI-powered sales productivity tools and copilots automate tasks, deliver real-time insights, and act as strategic partners, empowering sales teams to focus on closing deals and driving results.

SALES PRODUCTIVITY & COPILOTS/AI AGENTS

HubSpot

HubSpot Co-pilot

HubSpot Co-pilot is an AI-powered assistant integrated within HubSpot's CRM and Sales Hub, helping sales teams draft emails, summarize customer interactions, and prioritize tasks, streamlining the sales process for higher productivity.

fknowledge.hubspot.com/ai-tools/use-copilot

Notion

Notion AI

Notion AI enhances productivity for B2B sales teams by automating note-taking during meetings, generating summaries of key discussions, creating follow-up action items, and drafting sales proposals, allowing reps to focus on building client relationships and closing deals..

notion.so

salesforce

Salesforce Einstein Copilot / Agentforce

Salesforce Einstein Copilot is an intelligent AI assistant embedded across Salesforce applications, providing real-time guidance, automating workflows, and offering actionable insights to improve pipeline management and close rates.

salesforce.com/agentforce/

GONG

Gong.io AI Sales Assistant

Gong's AI Sales Assistant analyzes sales conversations to identify winning behaviors, track deal progress, and recommend next steps, empowering teams to make data-driven decisions.

gong.io/revenue-ai/

SALES PRODUCTIVITY & COPILOTS/AI AGENTS

Calendly

Calendly makes scheduling meetings easy. With its modern scheduling platform, Calendly enables businesses to get more work done by eliminating the hassle of back-and-forth communication, uncomplicating the scheduling process, and making "finding time" a breeze.

calendly.com

Chili Piper

ChiliPiper replaces the tedious process of emailing back and forth to schedule a meeting with 1-click scheduling. Unlike booking links, Chili Piper suggests times for you to meet, improving both the amount of leads you receive, and the number of meetings held.

chilipiper.com

Clari Co-pilot

Clari's Revenue Copilot provides AI-driven insights into deal risks, sales forecasting, and pipeline health, helping revenue teams align efforts and execute effectively across all stages of the sales cycle.

clari.com/products/copilot/

Amplemarket

Amplemarket offers an AI-driven platform that automates prospecting, outreach, and follow-ups, leveraging advanced tools like personalized email sequences, LinkedIn engagement, and multichannel workflows to help B2B sales teams connect with the right leads at the right time and scale their sales efforts efficiently.

amplemarket.com

SALES PRODUCTIVITY & COPILOTS/AI AGENTS

Warmly,

Warmly

Warmly helps B2B sales teams de-anonymize website visitors, track buying signals, and engage high-potential leads through automated, personalized chat, email, and LinkedIn outreach. It also enhances virtual meetings with real-time insights, icebreakers, and prep tools to drive stronger connections and conversions.

warmly.ai

Dynamics 365

Microsoft Dynamics 365 Copilot

Microsoft Dynamics 365 Copilot integrates seamlessly into the Dynamics 365 platform, providing AI-driven assistance for sales teams by generating email responses, summarizing customer interactions, and offering actionable insights to streamline pipeline management and boost deal velocity.

microsoft.com/en-us/dynamics-365#solutions

In a nutshell

Sales productivity tools and AI copilots streamline workflows, automate repetitive tasks, and provide real-time insights to help sales professionals maximize efficiency and performance. By acting as intelligent assistants, they analyze data, suggest actions, and deliver support during customer interactions.

As these tools evolve, advanced AI will transform them into proactive, strategic partners that optimize decision-making, improve workflows, and accelerate revenue growth.

VAINU
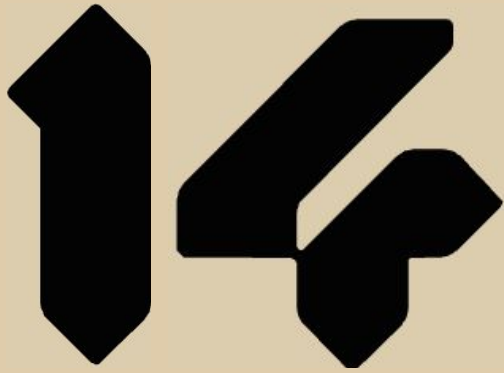
Compensation Management

COMPENSATION MANAGEMENT

Compensation management tools are redefining how organizations design, track, and optimize sales incentive plans to drive performance and motivate teams. These platforms automate commission calculations, ensuring accuracy and transparency while reducing manual errors and administrative burdens.

Real-time visibility into earnings and performance empowers sales reps to track their progress toward quotas, aligning their efforts with business goals. Leaders can leverage insights to design smarter compensation structures that reward behaviors driving revenue growth and retention.

Modern tools also integrate seamlessly with CRMs and revenue systems, pulling in live sales data to calculate commissions instantly and provide up-to-date dashboards. This ensures both sales reps and management have a clear understanding of performance metrics and payout timelines.

Looking ahead, AI-driven compensation tools will offer predictive insights, allowing businesses to model incentive plans, forecast outcomes, and optimize compensation strategies for maximum impact. These platforms will become indispensable for aligning incentives, boosting motivation, and driving sustainable sales growth.

Compensation management tools automate commissions, ensure transparency, and align incentives with business goals, empowering teams to perform at their best.

COMPENSATION MANAGEMENT

QUOTAPATH

QuotaPath

QuotaPath is a user-friendly sales compensation management platform that enables teams to automate commission tracking, visualize earnings, and forecast potential income, promoting transparency and motivation among sales representatives.

quotapath.com

salesforce

Salesforce Spiff

Salesforce Spiff is an incentive compensation management software that automates complex commission calculations, provides real-time visibility into earnings, and integrates seamlessly with Salesforce CRM to enhance sales performance and accuracy.

salesforce.com/sales/incentive-compensation-management/

CaptivateIQ

CaptivateIQ

CaptivateIQ offers a flexible commission management solution that automates compensation processes, allowing organizations to design and adjust complex commission plans easily, while providing sales teams with clear insights into their earnings.

captivateiq.com

everstage

Everstage

Everstage is a modern, no-code platform that automates sales commission processes, offering real-time visibility into earnings, customizable dashboards, and seamless integrations, thereby boosting sales team motivation and operational efficiency.

everstage.com

| COMPENSATION MANAGEMENT

Performio

Performio

Performio provides a comprehensive sales commission software that automates incentive calculations, delivers actionable insights through analytics, and supports complex compensation structures, enabling organizations to drive sales performance effectively.

performio.co

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visdum

Visdum

Visdum is a cloud-based sales commission management platform that streamlines incentive calculations, offers real-time analytics, and provides customizable dashboards, enabling businesses to design transparent compensation plans and motivate their sales teams effectively.

visdum.com

In a nutshell

Compensation management tools streamline commission calculations, reduce errors, and provide real-time visibility into earnings and performance. By aligning incentives with company goals, these platforms motivate sales teams and boost productivity.

As they evolve, AI-powered insights will help organizations design, model, and optimize compensation strategies, ensuring smarter incentives that drive revenue growth and team success.

Partner Ecosystem Platforms

PARTNER ECOSYSTEM PLATFORMS

Partner ecosystem platforms are transforming how businesses manage and leverage partnerships to drive growth. These tools enable companies to collaborate more effectively with partners by sharing data, identifying joint opportunities, and streamlining co-selling efforts. By centralizing partner relationships, businesses can optimize workflows, increase visibility, and accelerate revenue from their ecosystem.

A key feature of these platforms is data integration. By securely connecting CRM systems and other sales tools, they identify overlaps in accounts and opportunities, helping teams prioritize and coordinate efforts with partners. Additionally, automated workflows streamline partner onboarding, enable deal registration, and track performance across the ecosystem.

These platforms also provide insights into partner contributions and revenue impact, allowing businesses to measure success and optimize their partner strategies. As they evolve, AI-powered capabilities will offer predictive analytics to identify high-potential partnerships, enhance collaboration, and unlock untapped opportunities.

Looking forward, partner ecosystem platforms will play an essential role in driving scalable growth, creating deeper collaboration, and ensuring businesses maximize value from their partner networks.

Partner ecosystem platforms streamline collaboration, uncover opportunities, and drive growth by helping businesses manage and maximize the value of their partnerships.

PARTNER ECOSYSTEM PLATFORMS

Crossbeam

Crossbeam

Crossbeam is a partner ecosystem platform that enables companies to securely share data, identify overlapping customers and prospects, and discover new partnership opportunities to drive revenue growth. They acquired a French competitor Reveal in the summer of 2024.

crossbeam.com

PartnerStack

PartnerStack

PartnerStack is a comprehensive partner relationship management platform designed to help businesses accelerate partnerships revenue by providing infrastructure for various partner programs and access to an active network of B2B partners.

partnerstack.com

PARTNERTAP

PartnerTap

PartnerTap is an ecosystem data sharing and collaboration platform that enables enterprises to securely share account and opportunity data with partners, uncover new revenue opportunities, and manage co-selling activities effectively.

partnertap.com

IMPARTNER

Impartner

Impartner is a partner relationship management solution that helps companies manage and optimize their partner ecosystems by providing tools for partner onboarding, training, deal registration, and performance analytics.

impartner.com

PARTNER ECOSYSTEM PLATFORMS

Allbound

Allbound

Allbound is a partner enablement platform that offers tools for partner onboarding, training, content management, and deal registration, empowering businesses to engage and collaborate with their partner networks effectively.

allbound.com

WorkSpan

WorkSpan

WorkSpan is a partner ecosystem management platform that enables businesses to co-sell, co-market, and collaborate with their partners by providing tools for joint planning, deal tracking, and performance measurement, driving revenue growth through ecosystem partnerships.

workspan.com

In a nutshell

Partner ecosystem platforms centralize partner relationships, align data, and streamline workflows to optimize collaboration and co-selling. By integrating with CRMs and sales tools, they uncover account overlaps, track performance, and measure partner contributions.

As AI and predictive analytics evolve, these platforms will enable smarter partner strategies, driving scalable growth and deeper ecosystem collaboration.

VAINU

Vainu connects seamlessly with Salesforce, Dynamics 365, HubSpot, and Pipedrive CRM systems, keeping the company records up-to-date and filling out the data that's still missing without any manual work. With our CRM Connectors, integrating valuable company insights into your sales and marketing strategy and operations is a simple process.

Headquartered in Helsinki, Finland, Vainu was founded in 2013 and today provides 10,000+ sales, marketing, and data professionals with actionable company data to facilitate timely and relevant B2B communications through the creation of highly accurate target segments and complete company profiles.

Learn more at: www.vainu.com