

Market Guide for Digital Content Management for Sales

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Sales content management vendors have strongly expanded the scope of their capabilities. This Market Guide helps IT leaders to understand how the vendors and products' functions apply to their sales processes.

Key Findings

- Buyers frequently purchase third-party sales content solutions to fill capability and process gaps not provided by their incumbent sales force automation (SFA) or enterprise content management (ECM) systems.
- Digital content management for sales vendors have expanded the breadth and depth of their offerings in the past year, adding new capabilities in analytics, email delivery, and sales coaching, and training.
- Vendors have improved the overall value proposition of their solutions by adding capabilities for customer-facing and partner-facing content delivery use cases.
- Content recommendations based upon predictive analytics functions are not yet common to all vendors, but they will become a mainstream offering within the next two years.

Recommendations

IT leaders supporting sales should:

- Evaluate digital content management for sales applications if sales content is central to your sales execution processes.
- Reopen the evaluation process to additional vendors if it is more than one year since it was started, because vendors' capabilities have expanded considerably.
- Put at least three vendors on your evaluation shortlist because vendor's capabilities differ based upon the most common sales use cases that Gartner tracks.
- Favor solutions with robust usage monitoring analytics to determine the effectiveness of each piece of content, including new versions and permutations of the original document.

Market Definition

This document was revised on 25 October 2016. The document you are viewing is the corrected version. For more information, see the [Corrections](#) page on gartner.com.

Digital sales content management applications encompass repositories, authoring tools, collaborative environments, and interfaces for publishing, versioning and presenting content to help salespeople (both direct and indirect) efficiently and effectively develop and close business. These applications improve the delivery of sales collateral and other content to salespeople, or to improve engagement with prospects and clients. They are most commonly used to support long-cycle B2B and B2C sales processes, but they also apply to transactional sales processes, such as detailing merchandisers on the retail selling floor.

Companies use digital content management for sales solutions to satisfy at least one of these sales process use cases:

1. Customer-facing selling: Sales content is used to educate prospects or to evoke a purchase decision
2. Internal knowledge transfer: Sales content is used to convey new product information to representatives; also includes formal sales training and coaching functionality
3. Sales representative onboarding: Content is used to educate employees about the process, products and competitors
4. Partner relationship management and sales channel selling
5. Sales development representative (SDR) processes

To satisfy these sales use cases, Gartner defines the high-level capabilities of digital content management for sales in see Table 1.

Table 1. Capabilities of Digital Content Management for Sales

Capability	Description
Content repository management	Functions for storing and distributing sales materials to sales representatives; automated processes maintaining sales materials.
Content development	Functions that allow users to produce customized sales content.
Content delivery	Capabilities for delivering sales materials to recipients, including customized email messages, secure microsite landing pages, virtual web conferencing and in-person presentations.
Content usage analytics	Tools for measuring how sales representatives use sales content and how prospects consume the content delivered to them.
Sales process integration	Automated functions that integrate with CRM capabilities, particularly with sales activities and opportunities.

Source: Gartner (October 2016)

Within these capabilities, Gartner tracks more than four dozen subfunctions (see the Appendix for the complete list). Please contact Gartner to review how the specific subfunctions apply to your own sales use cases.

Companies that have made significant investments in sales force automation (SFA) systems will find that some of these capabilities overlap with their native SFA functions. That is intentional; many of the applications in this guide are marketed and sold as add-ons to SFA systems.

The capabilities of digital content management for sales are not the same as enterprise content management (ECM) systems. These solutions are also not the same as web content management systems, which are used by marketing leaders for website-specific marketing content. Gartner does not include enterprise file sharing and synchronization (EFSS) applications in this market either.

Some vendors have labeled this market as "sales acceleration" or "sales enablement." Although Gartner does not classify so-called "sales acceleration" tools as a market, those solutions are more commonly used to describe outbound templates and tracking tools for SDRs to use for prospecting. Gartner does recognize the term "sales enablement," but uses it to describe the entire, combined set of processes, content, training and tools/technologies that companies use to drive sales outcomes rather than a technology market per se. Digital content management for sales is just one of the solutions that meets Gartner's market definition for sales enablement.

Market Direction

In terms of revenue, the market is growing rapidly. Gartner estimates that buyers will have spent \$364 million on software from stand-alone vendors in this market by the end of 2016, which is a 28.5% increase over the estimated \$297.5 million spent worldwide on digital sales content management software in 2014. When SFA vendors are included in the market estimation, the market generates over \$1 billion in sales. This total makes it a meaningful part of the \$6 billion CRM sales market.

With regard to capabilities, digital content management for sales is a rapidly maturing marketplace. Per analysis provided, in the "Hype Cycle for CRM Sales, 2016," the market has reached the Plateau of Productivity. Solutions have matured to offer more intuitive solutions delivered as SaaS, with richer feature sets for presentation building, proposal generation, collaboration, portal development and content distribution.

The most improved functionality delivered by vendors in the past year includes:

1. Sales training functions
2. Embedded predictive analytics for content recommendations
3. Platform capabilities, used to build custom forms and back-end data integrations
4. Customized guided selling functions

As predictive analytics become more commonplace in other aspects of B2B sales and marketing, including account-based marketing, demand generation, lead scoring, forecasting and upsell/cross-sell, they are becoming more prevalent in digital content management for sales systems as well (see "Market Guide for SaaS-Based Predictive Analytics Applications for B2B Sales and Marketing") Some vendors have invested heavily in driving content recommendations based on machine learning. Others have gone further to utilize predictive analytics more deeply in content creation and assembly. And several vendors have predictive analytics on their near-term roadmap.

Many vendors have expanded their offerings, adding capabilities for sales training and sales coaching. Gartner has seen some vendors position their solutions as replacements for sales training and onboarding systems, especially those with capabilities similar to what you would find in a learning management system (LMS). Sales reps (and others) can search for, or get recommendations for, internal documents around specific competitors, for example. And as guided selling concepts get more integrated into these solutions, internal training becomes an important component.

Vendors have also improved capabilities around internal collaboration and invested in ways to make it easier to share content with prospects and customers. Integrations with Outlook and Gmail are supported by some of the vendors, while others integrate content into the tools and templates that are typically used by SDRs. A few vendors have their own native online meeting capabilities (with additional ones on near-term roadmaps), while other vendors have beefed up integrations with third-party meeting systems. All in all, Gartner sees a market in which a lot of investment is being made to improve the experience for those who create, send, present and consume sales-related content.

Market Analysis

Digital content management for sales covers a wide set of sales execution needs. Buyers select these solutions to meet at least one of the following objectives:

- Sales leaders require solutions that bring sales content directly into the opportunity management process, offering both content recommendations and next-best actions suggestions. SDRs and partners also need to have quick access to the right content in the right context.
- Content creators (typically in marketing and sales enablement functions) need to track the use of electronic sales aids during sales presentations and throughout the rest of the sales process to measure effectiveness and to meet regulatory requirements.
- Managers need to monitor how their representatives use sales content in order to affect outcomes.

Some of the solutions are specifically designed to accommodate more complex sales processes, such as multiproduct software deals, while others are geared toward more repeatable, less complex solutions, and yet others are geared toward sales representatives in particular industries, especially those with heavy regulatory compliance requirements such as financial services and pharmaceuticals.

Some of the solutions have more of an external focus (to get the right content to the right client at the right point during their buying journey), while others have more of an internal focus (for onboarding or internal enablement).

Many solutions in this space provide strong content repository functions such as versioning, workflow, search and relevancy indicators. The leading solutions provide a dedicated mobile application, where sales presentations can be accessed, shared and emailed to contacts and leads. Other solutions offer deep integration into sales processes and SFA applications. Several solutions have usage and adoption metrics so that managers can determine how collateral pieces affected sales cycles.

The majority of the digital content management for sales technology is SaaS-based, meaning that the provider's technology runs on its own proprietary technology stack.

Some solutions are built upon HTML5, which means that the applications are fully optimized for tablets and can be used for data collection, such as credit applications. Tablets and smartphones are excellent delivery mechanisms for presenting on-the-spot content or reviewing content when selling, which is critical for more complex sales processes that require face-to-face meetings. Social media also impacts sales content when enterprises consider what is posted there about their companies and entered into a content repository, reflecting reviews, comments or referrals.

These solutions are not yet replacements for LMSs, but Gartner believes that they are meaningful options because they provide contextual functionality in applications that sales representatives already use.

Most of the vendors in the market price their solutions on a per user (includes content owners, sales representatives, SDRs and partners) per month basis, with different versions based on the functionality and use case. Solutions start from as little as \$10 per user, per month and increase to more than \$100 per user, per month in some cases. Volume discounts are typically available. Vendors often have minimum user counts, but they vary. A few vendors offer different pricing models. Salesforce includes its digital content management for sales functionality as part of its Sales Cloud licenses.

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

To be included in this market, vendors must:

- Provide at least two of the high-level capabilities defined in Table 1
- Sell to multiple industries and have demonstrated implementations in more than two industries
- Have 25 or more live implementations

- Have must-have functionality that is purpose-built for at least one of these use cases: customer-facing selling, internal knowledge transfer, sales representative onboarding, partner relationship management (PRM) and SDR processes.

Accent Technologies

<https://accent-technologies.com>

Product: Accent Present, Accent Connect, Accent Accelerate

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement

Accent is headquartered in Melbourne, Florida. It introduced its digital content management for sales product in 2003 and it supports four of the five major use cases that Gartner tracks. Accent has taken no outside investment and has been profitable for several years. The company initially focused on financial services, but has expanded to other industries in the last few years. Accent sells primarily to large enterprises with complex sales processes; one of its largest global deployments has 17,000 users.

Among Accent's capabilities, the Accent Accelerate product for data integration is notable. It integrates SFA with content engagement data to produce new selling insights, such as sales activity prioritization. For prescriptive recommendations, eleven different machine-learning models are supported across contents, contacts, and prospects' buying readiness. Unlike other vendors, users can build and test their own content predictive model models. Accent also offers a content creation wizard.

Industries Represented: High-tech, financial services, government, life sciences, travel and hospitality

Supported Integrations: Salesforce, Microsoft Dynamics CRM, SharePoint, Google Drive, Dropbox, Box, HubSpot, Marketo, Oracle (Eloqua, Sales Cloud), SAP CRM

Notable Customers: BNY Mellon, DHL, McKesson, American Century Investments, Analog Devices Inc. (ADI), AMD, Norwegian Cruise Line, WebMD, UBS, TripAdvisor, Ortho Clinical Diagnostics

Pricing: From \$30 to \$85 per user, per month based on the version deployed

bigtincan

www.bigtincan.com

Product: Bigtincan Hub Platform

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

Bigtincan is headquartered in Waltham, Massachusetts. bigtincan's solution is primarily targeted to address the needs of large enterprise customers in heavily regulated industries such as banking and

life sciences, with uses cases involving internal sales enablement, customer-facing selling and PRM. Bigtincan Hub is a native application that runs across multiple platforms (iOS, Android, Windows, web) and allows for mixed content types, including HTML5 content and forms, which means that administrators can implement data-capture processes on the platform. They can also deploy multiple instances of bigtincan users on tablets or mobile devices, allowing them to apply custom branding to each instance.

A core differentiator is the AI engine, Content Intelligence (Content IQ). It uses rules and algorithm based on machine learning to provide real-time contextual recommendations to the sales users based on sales stages, opportunity data, geolocation, and prospects' interaction with the content. The application supports guided-selling with the sales process integration in SFA (with Salesforce and Microsoft Dynamics CRM), and also through the mobile app. The content can be created by using BTC studio, a design tool embedded in the application, which enables sales reps to create compelling content and presentations.

Industries Represented: Life sciences, retail, manufacturing, insurance, banking and financial services

Supported Integrations: hc1.com, Microsoft Dynamics, Marketo, Salesforce, Oracle CRM On Demand, Adobe CQ, Dell EMC Documentum, IBM FileNet Content Manager, SharePoint, OpenText, Microsoft Active Directory, NetIQ eDirectory

Notable Customers: Merck, ANZ, Zoetis, CA Technologies, Gap, Guess, AT&T, Telefónica and Michelin

Pricing: From \$9.50 to \$29.50 per user, per month based on the version deployed. Bigtincan Studio is an additional \$12.50 per user, per month

Brainshark

www.brainshark.com

Product: Brainshark

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

Brainshark is based in Waltham, Massachusetts, and is one of the most tenured vendors in the digital content management for sales space. Brainshark is most commonly used by midsize organizations for sales representative training and internal knowledge transfer. Brainshark uses a rich-media content engine to host content, as well as create content. Brainshark's product roadmap is focused on increasing sales productivity through integrated training and coaching capabilities, expanded CRM and content management integrations, and enhanced analytics.

Users can create and share voice-enriched presentations and videos; functions that are meaningful for increasing prospects' engagement with the content. In terms of sales process integration, Brainshark's Sales Accelerator solution provides recommended sales content to sales

representatives in context, with selling situations and opportunity data. Brainshark introduced new coaching and training capabilities in 2016, which can be used natively within the Brainshark application, or integrated with Salesforce.

Industries Represented: High-tech, manufacturing, financial services, insurance, life sciences, retail

Supported Integrations: Salesforce, Microsoft Outlook, SAP CRM, Oracle (Eloqua), Marketo, Tableau

Notable Customers: GE Digital, Veritiv, Galderma, Alfresco, Cleo, PTC, NEC, Penske, Tegna, Wayfair, Oracle (Opower)

Pricing: From \$9 to \$55 per user, per month based on the choice of solutions. Full Brainshark platform for Salesforce users is \$55 per user, per month.

CallidusCloud

www.calliduscloud.com

Product: CallidusCloud Enablement

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

CallidusCloud, based in Dublin, California, is a SaaS-based provider of sales performance management and sales enablement solutions. The CallidusCloud Enablement product for sales content is used by companies across all industry verticals for sales representative onboarding and internal knowledge transfer. The core value proposition is content governance capabilities. It has meaningful capabilities, such as intranet pages, content search, and archival, capabilities that are similar to an ECM solution. CallidusCloud's focus for future releases is to strengthen its predictive analytics capabilities and offer voice of the customer (VoC) functionality to identify the top content based on customers' satisfaction levels.

CallidusCloud Enablement is relevant to companies that require sales intranet pages to distribute content, display new content and provide guided selling functions. Administrators can deploy static playbooks to support the specific sales processes. Unique to CallidusCloud is the tagging wizard, which enhances how content is tagged. The product reduces out-of-date content with automatic archiving and update reminders, and by supporting strong content governance practices. CallidusCloud also offers a portal product for secure content delivery to clients and prospects.

Industries Represented: High-tech, financial services, life sciences, professional services, insurance and manufacturing

Supported Integrations: Salesforce, Box, Google Calendar, CallidusCloud Litmos (eLearning), CallidusCloud Configure Price Quote (CPQ), CallidusCloud Commissions, CallidusCloud Badgeville

Notable Customers: Lenovo, Barracuda Networks, Stonebranch, CDW

Pricing: From \$10 to \$90 per user, per month based on the version deployed

ClearSlide

www.clearslide.com

Product: ClearSlide Sales Engagement Platform

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

ClearSlide is a sales enablement vendor headquartered in San Francisco, California, with more than 5,000 customer accounts across a wide range of industries. ClearSlide is primarily purchased for customer-facing selling. Its core value proposition is allowing sales reps and SDRs to customize content delivery across different channels, including web conferencing, in-person presentations, email and offline. It integrates with Salesforce and Microsoft Dynamics CRM, which ensures recommendations in account and opportunity objects. By using the native ClearSlide functionality inside Salesforce and Dynamics, users can initiate online meetings, send emails and also launch campaigns from leads.

The product's native video recording functions, often used for sales coaching, are relevant to buyers' need to improve sales enablement processes. Additionally, ClearSlide rearchitected the product in late 2015, improving the content engagement analytics capabilities and adding new, integrated communications functions. ClearSlide also released video email functions. As part of the platform changes initiated in 2015, ClearSlide launched the ION release this fall, with sales engagement dashboards, guided selling and recommended content, and will deliver predictive analytics capabilities in late 2016.

Industries Represented: High-tech, financial services, life sciences, professional services, insurance and manufacturing, public sector, retail, utilities, oil and gas

Supported Integrations: Salesforce, Microsoft Outlook, Google Drive, Box, Dropbox, Gmail

Notable Customers: Autodesk, Comcast, LinkedIn, Medtronic, The Economist, Thomson Reuters

Pricing: From \$35 to \$125 per user, per month based on the version deployed

Docurated

www.docurated.com

Products: Docurated Platform, Docurated Anywhere, Docurated Presentation Builder

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

Docurated is based in New York City, New York, and introduced its digital content management for sales product in 2013. Clients use Docurated primarily for internal knowledge transfer and sales

representative onboarding. The application provides its own repository, and can also be integrated to third-party repositories such as Documentum and SharePoint. The application provides native content creation capability by using Docurated Composer, and the content can be delivered through emails, live presentations and web conferencing through Docurated Presenter.

Docurated's most unique capability is the Docurated Content Graph. It provides a visual representation of content and activity, corresponding to the relationship developed by the content within the enterprise, and with customers and prospects. Docurated has a machine learning algorithm called "DocuRank." It acts as an intelligent agent that provides real-time contextual content recommendations (from across different repositories) to sales reps based on the sales situations, and presents the highest ranked content for that situation. Its recommendations are enhanced as the content interaction grows across the enterprise and also with the customers. It also uses metadata for content publication and discovery.

Industries Represented: High-tech, life sciences, retail, banking and financial services

Supported Integrations: Salesforce, Microsoft Dynamics, Box, Dropbox, Google Drive, Microsoft OneDrive, Microsoft SharePoint, OpenText, Documentum

Notable Customers: Appirio, Acquia, Del Monte, Gainsight, DigitasLBi, Havas, DIRECTV and Cox Communications.

Pricing: From \$35 to \$150 per user, per month based on the version deployed

Enhatch

www.enhatch.com

Product: Capture Basic, Capture Pro and Capture Enterprise

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement

Enhatch is based in Hoboken, New Jersey and launched its first sales content management product in 2012. Enhatch's clients are primarily in the life sciences industry. Enhatch provides its applications in three different product variants: Basic provides a basic folder style view and application creation, Professional provides full, templated and free-form application creation capabilities, Enterprise allows for full designer, custom forms and custom branding of multiple apps. Enhatch provides simple and easy to use content creation capabilities.

Enhatch is most relevant to companies that seek a content creation platform for building their own digital detailing applications with HTML5 content. Because of the platform, Enhatch also offers native integration with SFA and ERP systems. For example, users can create opportunities in Enhatch that integrate with the SFA, or create orders that integrate to the ERP system. Users can retrieve content from custom microsites or from custom applications. Enhatch does not support prescriptive or predictive content recommendations currently, but it is a part of the roadmap.

Industries Represented: Medical devices, transportation and construction

Supported Integrations: Salesforce, Microsoft Dynamics, Dropbox, Box

Notable Customers: GE, CRH and Integra LifeSciences

Pricing: From \$19 to \$49 per user, per month based on the version deployed

Highspot

www.highspot.com

Product: Highspot, Highspot channel partner sales enablement

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

Highspot is based in Seattle, Washington. It introduced its digital content management for sales product in 2014, and has acquired more than 100 customers. Customers commonly purchase Highspot for customer- and partner-facing selling capabilities, which is enabled by the breadth of functions for content management, organization and recommendations based on sales performance of the content. Highspot has been primarily sold to midsize and high-tech companies, but also has customers spanning a broad range of industries. Highspot has a useful user interface that organizes content into objects called "spots." The product offers deep integration with Office 365, including the ability to customize content in Office applications. Highspot also leverages machine learning. Its "content genomics" feature looks at all changes and permutations of a specific piece of content so that marketers can understand how it's been used, what messages work best and which version of it drives buyers further down the funnel. In the past year, Highspot improved the sales onboarding, internal and partner enablement capabilities.

Industries Represented: High-tech, financial services, life sciences, advertising, manufacturing, CPG, retail

Supported Integrations: Salesforce, Microsoft Dynamics, Microsoft Office, Microsoft SharePoint, Microsoft Power BI, OneDrive, Box, Dropbox, Google Drive, Alfresco, ToutApp, Jive, Outlook, Gmail.

Notable Customers: Concur, Red Hat, Starbucks, Dropbox, Sisense, InsideView, ChemPoint, ToutApp, PayScale, Booking.com, MultiView

Pricing: \$35 per user, per month for direct sales users, \$3.50 per user per month for partner users

KnowledgeTree

www.knowledgetree.com

Product: KnowledgeTree Fusion, KnowledgeTree LaunchPad (Content repository)

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

KnowledgeTree is based in Raleigh, North Carolina. The company started as an open-source content management vendor in 2008, but introduced its digital content management for sales product in 2013. KnowledgeTree focuses on companies with repeatable processes and large sales teams. Most of its customers are outside of regulated industries and have large teams of inside sales reps (ISRs) and SDRs. KnowledgeTree integrates with a full range of inside sales solutions such as ToutApp, Yesware and SalesLoft, as well as Outlook and Gmail, so reps and SDRs can easily share content via email templates with customers. KnowledgeTree released a benchmarking capability in late 2015, where a best practices methodology can be defined to recommend and push content to representatives.

KnowledgeTree uses predictive analytics to dynamically rank the relevant content for a deal's sales stage or other fields for the opportunity (and other objects) and also embeds content recommendations into the user workflow. Fusion also provides a playbook function named QuickPlays, where these contextual recommendations can be combined into next-step actions. Prescriptive recommendations can also be provided by setting up rules to support a structured sales methodology and guided selling.

Industries Represented: Manufacturing, high-tech, life sciences and retail

Supported Integrations: Salesforce, Marketo, Box, Dropbox, Alfresco, SharePoint and all URL-driven repositories

Notable Customers: RingCentral, SparkPost, Teletrac

Pricing: From \$45 to \$65 per user, per month based on the version deployed and its functionality

Microsoft

www.microsoft.com

Product: Microsoft Dynamics 365 for Sales

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

Microsoft is headquartered in Redmond, Washington. Microsoft's core offering of sales content management with Dynamics 365 focuses on the complete content life cycle, starting from content creation to content delivery and consumption by customers and prospects. The application provides its own content library, but it can also integrate with SharePoint and OneDrive. The solution enhances collaboration between sales teams by using the Office 365 Groups inside or outside the Microsoft Dynamics SFA application. These groups provide workspaces where sales teams can collaborate for a particular opportunity and account, and share content. Content recommendations are also provided based on sales context in a more prescriptive manner based on the rules configured to support a sales methodology. The Office 365 groups can also be integrated with SharePoint.

Microsoft also uses Microsoft Office Delve to surface content recommendations inside Microsoft Dynamics CRM. Users can discover trending and new content from a native Delve dashboard inside

Dynamics CRM. The major use cases are centered on internal sales enablement and sales representative onboarding. The new reps can use a Learning Path, which provides a guided learning experience to support onboarding. The predictive content recommendations feature, one that uses new Delve predictive analytics capabilities to recommend content for opportunities, is slated to be released later this year.

Industries Represented: Manufacturing, financial services, public sector, retail and healthcare

Supported Integrations: Microsoft Dynamics, Outlook, SharePoint

Notable Customers: Kennametal, Metro Bank, O'Neal Steel, Pyrotek

Pricing: Sales content functions are bundled into Microsoft Dynamics CRM. Prices range from \$50 to \$85 per user, per month.

MindTouch

www.mindtouch.com

Product: MindTouch

Use cases: Internal enablement and SDR processes

MindTouch is an 11-year-old company that is headquartered in San Diego, California. MindTouch is suitable for companies that rely on content to train representatives, build internal knowledge and, most significantly, to automate how content is presented to customers. The solutions' core value proposition is the way that it exposes sales content to self-service, public-facing websites, thereby making it optimized for search engine optimization processes. This is meaningful for companies that want to align their selling efforts with the prospects' buying journeys, be they B2B or B2C journeys.

MindTouch offers several unique capabilities. The core of the product is the way that it organizes content into semantically organized microcontent hierarchies. This means that users can access deep analytics about how content components are used by clients. The product features a guided authoring experience, which allows users to generate a content map or to automatically produce sales pitches.

Industries Represented: Manufacturing, hi-tech, CPG, advertising and retail

Supported Integrations: Salesforce, SAP CRM, Zendesk, Microsoft, NetSuite, Oracle, ServiceNow

Notable Customers: Demo, American Airlines, Samsung, Intuit, Whirlpool, Cisco, Verizon, Zuora

Pricing: Starts at \$40,000 per year

Pitcher

www.pitcher.com

Product: Pitcher

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement

Pitcher is a five-year-old company based in Zurich, Switzerland. Pitcher's clients are primarily companies that require digital sales tools. In support use cases, Pitcher's offerings include two user-facing products. Pitcher Impact is an HTML5 app on mobile devices, which works offline. Pitcher Insights is the analytics component that collects feedback and records events. For administrators, Pitcher provides an integration product named Pitcher Connect. The application works with any browser and on any device for accessing content from either reps or customers, and also provides remote presentation capability.

Clients commonly select Pitcher based on the strength of its products' offline capabilities and functionality for HTML5 documents. Indeed, users can convert PowerPoint documents to HTML5 documents, and Pitcher offers a unique sentiment analysis function; If, while showing content, users swipe from the top of the document, the application records a positive reaction to the content. To meet the requirements of its life sciences clients, Pitcher also offers selling functionality, such as sales activity management.

Industries Represented: Life Sciences, Service, Manufacturing, Consumer Goods, Financial Services, Real Estate

Supported Integrations: Salesforce, SFDC, Dynamics, Oracle, Drupal, AEM, Microsoft SharePoint

Notable Customers: Zoetis, Shell, Nespresso

Pricing: Not provided by vendor

Qvidian

www.qvidian.com

Product: Qvidian Digital Playbooks, Qvidian Content Automation, Qvidian Content Analytics

Use cases: Customer-facing selling, internal enablement, sales representative onboarding and SDR processes

Qvidian is headquartered in Chelmsford, Massachusetts. Qvidian has expanded its product offerings beyond the proposal management functionality for which it has been commonly known. It now offers a complete set of digital content management capabilities to its roster of 1,200 clients. It is relevant to Salesforce or Microsoft Dynamics clients that rely on sales documents to drive complex, long-cycle sales processes. Qvidian has a strong level of process automation, combining its content repository system with guided selling functionality and predictive analytics. Content managers will value the repository functions, including the bulk upload function, document aging alerts and workflow tools. Qvidian can be a stand-alone repository or will integrate with the most common, cloud-based repositories.

Qvidian has deep integration with SFA systems, where updates to opportunity status values trigger new document recommendations to users. Central to the offering are guided selling playbooks that deliver personalized, relevant sales documents. Qvidian has a predictive analytics engine underlying the recommendation function. Qvidian is one of the few companies that stores components of documents as data objects, making discrete elements of those documents searchable and reusable. Static documents, such as PDF files, can be converted into data objects. Unlike many other vendors, Qvidian supports its products with a professional services team.

Industries Represented: High-tech, financial services, business services, manufacturing, telecommunications

Supported Integrations: Salesforce, Microsoft Dynamics CRM, Microsoft Outlook, configure, price and quote (CPQs) — SteelBrick and Apttus

Notable Customers: BeyondTrust, HSBC, UnitedHealthcare, Honeywell, Verizon

Salesforce

www.salesforce.com

Product: Salesforce Files

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

Salesforce is headquartered in San Francisco, California. Salesforce provides a native content library, provided as part of its Sales Cloud licenses. Salesforce Files has a broad set of capabilities. It integrates with external repositories such as Google Drive and SharePoint. It supports content delivery for a particular opportunity by creating a unique public link that can be used to share content with customers. The in-built analytics then track the content usage. The offering leverages Chatter as a collaboration tool for sharing content within the sales team based on the context of an opportunity or account. It provides guided selling with the configurable Sales Path function.

In 2016, Salesforce updated the content management product, combining several content repository, discovery, and usage functions into a unified offering called Salesforce Files. It leverages different applications across sales, marketing, customer service and communities to provide a single view of content usage across the enterprise and to identify the best performing content. Buyers should be aware that this new version of Salesforce Files is only available in implementations that have activated Lightning.

Industries Represented: High-tech, life sciences, consumer goods, retail, manufacturing and media

Supported Integrations: Salesforce, SharePoint 2010, SharePoint 2013, SharePoint Online, OneDrive for Business, Google Drive, Box and any OData compatible data source

Notable Customers: VMware, JDA, Fannie Mae, St. Joseph Health, Recreational Equipment (REI), Mitsubishi Electric, Barclays

Pricing: Salesforce Files is included in all Salesforce licenses

Savo

www.savogroup.com

Product: Smarter Content, Smarter Engagement, Smarter Execution

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

Savo, headquartered in Chicago, Illinois, is one of the most tenured vendors in the digital content management for sales space and the largest pure-play vendor in this guide in terms of revenue. Its solutions are used by more than 200 organizations and has more than 800,000 active users. They are primarily suited for large organizations with complex sales processes and provide all the major capabilities that Gartner tracks. Savo's latest release provides a new, personalized, consumer-like user experience and many of its customers have between 1,000 and 5,000 users. But the company also seeks to differentiate in its ability to serve very large enterprises (including those with more than 50,000 users) through its experience in this market, the breadth of its solutions, and with capabilities such as custom page support in the portal, embedded workflows for content approval, regional/country subdivisions, partner certifications and an experienced professional services team. Unique to other vendors in the market, it supports 23 languages.

Savo offers dynamic, contextually driven recommendations playbooks based on the sales process, although customers can manually choose the content links based on regulatory or other requirements. In terms of predictive analytics, Savo currently has an engine that provides recommendations based on user behavior and patterns of how different pieces of content are consumed within Savo. While content can be accessed (or prescriptively recommended) via SFA systems, many users continue to access content in Savo's portal and the company recently improved the user experience for that environment. Savo also provides a full native mobile sales enablement application targeted at field reps.

Industries Represented: High-tech, financial services, healthcare, life sciences, business services, manufacturing, oil and gas

Supported Integrations: Microsoft Dynamics, Salesforce (SalesCloud and CRM Content), Adobe Experience Manager, Microsoft SharePoint

Notable Customers: Citrix, ADP, Rockwell Automation, PTC, Northern Trust, TransUnion, Philips Healthcare, Zebra.

Pricing: Ranges from \$50 to \$120 per user, per month based upon modules selected

Seismic

<https://seismic.com>

Product: Seismic

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

Seismic is based in San Diego, California. The company is frequently mentioned as a primary competitor by other vendors in this guide, especially in financial services and other regulated industries, but more recently in high-tech and manufacturing as well. Seismic serves small and midmarket enterprises, but more than half of its 200 or more customers have at least 7,500 users. Seismic is most relevant to companies in regulated industries with significant content governance requirements. Seismic LiveDoc technology sits at the core of its solution. It automates the creation of personalized, customer-facing content based on the buying life cycle and sales processes.

LiveDoc enables a component-based approach to content assembly, so a change (examples include compliance changes or updates to a product name or information) can be made once and applied across a wide range of content. There are no native content creation tools, but the content can be created in Microsoft applications. Seismic has added predictive analytics capabilities for content recommendations. Seismic also offers guided selling by using a wizard-like interface, and sales playbooks can be configured based on rules to support a structured sales methodology.

Industries Represented: High-tech, financial services, insurance, healthcare and manufacturing

Supported Integrations: Salesforce, Microsoft Outlook, Microsoft SharePoint, Box, Dropbox

Notable Customers: American Express, BNY Mellon, Hitachi Data Systems, Illumina, Workday

Pricing: From \$32 to \$65 per month based on the version deployed

Showpad

www.showpad.com

Product: Showpad

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement, SDR processes

Showpad is headquartered in San Francisco, California, but began as a European-headquartered company. Showpad introduced its offering for digital content management for sales in 2011 and supports all the five major use cases, with a strong focus on customer-facing selling and partner enablement. With more than 850 customers, Showpad has had a lot of success in the midmarket, especially in Europe, but has recently broadened its focus to include larger sales organizations (up to 5,000 sales reps) with complex sales processes as well. Many of Showpad's customers are in regulated industries and/or have a strong field/channel sales component and many of those

interactions occur face-to-face. The company recently raised another \$50 million in venture funding and has invested some of that in an aggressive product roadmap.

As marketers and salespeople increasingly embrace the use of interactive (rather than static) content, Showpad aims to differentiate itself on the basis of its interactive content creation and presentation capabilities across a wide range of devices. Part of that includes native templates that cover many of the most popular use cases requested by customers. Showpad has a "Magic Meetings" capability, ensuring that anything that is shown in a meeting is automatically logged in Salesforce and in the calendar record as well, saving reps the need to manually update them.

Industries Represented: High-tech, financial services, healthcare, construction, manufacturing

Supported Integrations: Salesforce, Microsoft Dynamics, Gmail, Microsoft Outlook, Dropbox, Box, Google Drive and SharePoint.

Notable Customers: Xerox, Roche, bioMerieux, Johnson & Johnson, BASF, Fujifilm, Bridgestone Group, FireEye, Dow

Pricing: From \$22.50 to \$55 per user, per month based on the version deployed

SpringCM

www.springcm.com

Product: SpringCM for sales content, SpringCM for partner content

Use cases: Customer-facing selling, internal enablement, sales representative onboarding, partner enablement

SpringCM is headquartered in Chicago, Illinois. It provides separate products for sales content and partner content. SpringCM supports four out of the five use cases tracked by Gartner. The sales content product supports the full content life cycle. It provides a native repository, and the content can be appropriately versioned and easily searched by the sales reps. Similarly, the partner content product helps partners leverage the content that the sales team has shared with them. By using an extensive REST API, partners leverage SpringCM as a content delivery network to serve up content in other applications, internal and external portals, and via mobiles.

The solution integrates with Salesforce to provide contextual content recommendations. SpringCM has a native mobile application for iOS and Android for document syncing, plus it also has a native Salesforce mobile app. Users can view documents in the application, but can perform only a few editing functions. It also has good document audit trail capabilities, which is important for companies with compliance requirements. SpringCM's roadmap involves improving the mobile-first access to content and dynamically surfacing content to users in key sales processes.

Industries Represented: High-tech, financial services, life sciences, advertising, manufacturing, consumer packaged goods, retail

Supported Integrations: Salesforce, Adobe Sign, DocuSign, Okta, Azure

Notable Customers: Medtronic, Panasonic, Hilton Worldwide, NBC Universal (Fandango)

Pricing: From \$29 to \$79 per user, per month based on the version deployed

Market Recommendations

Sales organizations with moderate to high volumes of electronic content (for example, Microsoft PowerPoint presentations and collateral based on PDF files or Microsoft Word documents) should consider basic sales content management systems to improve the oversight of collateral. Sales organizations that rely on complex, time-sensitive and precise information to advance sales cycles should pursue sales content management solutions to increase sales effectiveness (such as improving project-based or complex solution selling practices).

Select vendors based on their ability to provide:

- Version control
- External delivery
- Check-in/check-out
- Mobile delivery on tablets
- Profile-driven access
- Online and offline access to sales content
- Industry-specific references

Involve marketing personnel in initiatives, when possible, to leverage experiences with similar systems and practices for developing, cataloging and managing varieties of content.

Sales content management systems must be accessible and appeal to the self-interests of salespeople to gain necessary buy-in and valuable contributions from the field. Therefore, focus initially on developing and personalizing presentations and proposals, as well as publishing competitive analyses, objection-handling guidance, and successful sales messages and/or talking points, because these areas offer rapid ROI and will earn popularity with sales personnel.

Appendix

Table 2. Capability: Content Repository Management

Vendor	Native Library	Offline Library	Integrate With EFSS*	Content Workflow	Content Search: Native	Content Search: Federated	User- or Team- Specific Workspaces	Content Change/Revision Auditing	Profile-Based CRUD** Permissions
Accent	X	X	X	X	X	X	X	X	X
bigtincan	X	X	X	X	X	X	X	X	X
Brainshark	X		X		X		X	X	X
CallidusCloud	X		X	X	X	X	X	X	X
ClearSlide	X	X	X	X	X	X	X	X	X
Docurated	X	X	X	X	X	X	X	X	X
Enhatch	X	X	X		X		X	X	X
Highspot	X	X	X	X	X	X	X	X	X
KnowledgeTree	X		X	X	X	X	X	X	X
Microsoft	X	X	X	X	X	X	X	X	X
MindTouch	X	X	X	X	X		X	X	X
Pitcher	X	X	X	X	X	X	X	X	X
Qvidian	x			x	x		x	x	x
Salesforce	X	X	X	X	X	X	X	X	X
Savo	X	X	X	X	X		X	X	X

Vendor	Native Library	Offline Library	Integrate With EFSS*	Content Workflow	Content Search: Native	Content Search: Federated	User- or Team- Specific Workspaces	Content Change/Revision Auditing	Profile-Based CRUD** Permissions
Seismic	X	X	X	X	X	X	X	X	X
SpringCM	X	X	X	X	X		X	X	X
Showpad	X	X	X	X	X	X	X	X	X

*EFSS=enterprise file synchronization and sharing; **CRUD=create, read, update, delete

Source: Gartner (October 2016)

Table 3. Capability: Content Development

Vendor	Native Content Creation	HTML5 Editor	Vocal Annotation	Slide Sorter	Field-Merge Functions With Sales Force Automation System
Accent	X	X	X	X	X
bigtincan	X	X	X	X	X
Brainshark	X		X	X	
CallidusCloud		X		X	X
ClearSlide	X			X	X
Docrated	X	X		X	X
Enhatch	X	X	X	X	X
Highspot	X			X	
KnowledgeTree		X		X	X
Microsoft	X	X	X		X
MindTouch	X	X	X	X	X
Pitcher	X	X	X	X	X
Qvidian	x			x	x
Salesforce	X	X			
Savo	X		X	X	X
Seismic	X			X	X
SpringCM	X				X
Showpad	X	X	X	X	

Source: Gartner (October 2016)

Table 4. Capability: Content Delivery

Vendor	Email Content From Application	Email Templates	Jump to Slide	Secure Download Pages From Microsite Web Pages	Live Presentation/Web Conferencing
Accent	X	X	X	X	X
bigtincan	X	X	X	X	X
Brainshark	X	X	X	X	X
CallidusCloud	X	X		X	X
ClearSlide	X	X	X	X	X
Docurated	X	X	X	X	X
Enhatch	X	X	X	X	X
Highspot	X	X	X	X	X
KnowledgeTree	X	X	X	X	X
Microsoft	X	X		X	X
MindTouch	X	X	X	X	
Pitcher	X	X	X	X	X
Qvidian	x	x		x	
Salesforce	X	X		X	
Savo	X	X	X	X	X
Seismic	X	X	X	X	X
SpringCM	X	X		X	
Showpad	X	X	X	X	X

Source: Gartner (October 2016)

Table 5. Capability: Sales Analytics

Vendor	Live Presentation/Web Conferencing	External Content Consumption Analytics	Internal Analytics	User- and Team-Level Reporting	Slide-Level Analytics
Accent	X	X	X	X	X
bigtincan	X	X	X	X	X
Brainshark	X	X	X	X	X
CallidusCloud	X	X	X	X	
ClearSlide	X	X	X	X	X
Docurated	X	X	X	X	X
Enhatch	X	X	X	X	X
Highspot	X	X	X	X	X
KnowledgeTree	X	X	X	X	X
Microsoft	X	X	X	X	
MindTouch	X	X	X	X	X
Pitcher	X	X	X	X	X
Qvidian		x	x	x	x
Salesforce	X	X	X	X	
Savo	X	X	X	X	X
Seismic	X	X	X	X	X
SpringCM	X	X	X	X	
Showpad	X	X	X	X	X

Source: Gartner (October 2016)

Table 6. Capability: Sales Process Integration

Vendor	Marketing Automation Integration.	SFA* Activity Integration	SFA* Opportunity Integration	Content Recommendations.	Predictive Analytics for Content Recommendations	Sales Playbooks (Static)	Predictive Analytics for Next-Best Action	Salesforce Integration	Microsoft Dynamics Integration
Accent	X	X	X	X	X	X	X	X	X
bigtincan	X	X	X	X	X	X	X	X	X
Brainshark	X	X	X	X		X		X	
CallidusCloud	X	X	X	X	X	X	X	X	X
ClearSlide	X	X	X	X	X	X	X	X	X
Docurated	X	X	X	X	X	X	X	X	X
Enhatch	X	X	X			X		X	X
Highspot	X	X	X	X	X	X	X	X	X
KnowledgeTree	X	X	X	X	X	X	X	X	
Microsoft	X	X	X	X	X	X	X		X
MindTouch	X	X	X	X	X	X	X	X	X
Pitcher	X	X	X	X	X	X	X	X	X
Qvidian	X	X	X	X				X	X
Salesforce	X	X	X	X		X		X	

Vendor	Marketing Automation Integration.	SFA* Activity Integration	SFA* Opportunity Integration	Content Recommendations.	Predictive Analytics for Content Recommendations	Sales Playbooks (Static)	Predictive Analytics for Next-Best Action	Salesforce Integration	Microsoft Dynamics Integration
Savo	X	X	X	X	X	X	X	X	X
Seismic	X	X	X	X	X	X	X	X	X
SpringCM	X	X	X	X		X		X	X
Showpad	X	X	X	X	X	X	X	X	X
SFA=sales force automation									

Source: Gartner (October 2016)

Table 7. Capabilities: Other

Vendor	Platform	SSO*/SAML** integration	LDAP*** integration	Microsoft Outlook Integration	Gmail/ Google Calendar Integration	Proposal/ Contract Management Capabilities
Accent	X	X	X	X	X	X
bigtincan	X	X	X	X	X	X
Brainshark	X	X	X	X		X
CallidusCloud		X	X	X	X	
ClearSlide	X	X		X	X	X
Docurated	X	X	X	X	X	X
Enhatch	X	X	X		X	X
Highspot	X	X	X	X	X	
KnowledgeTree	X	X	X		X	
Microsoft	X	X	X	X	X	X
MindTouch	X	X	X	X	X	
Pitcher	X	X	X	X	X	X
Qvidian	X	X	X	X	X	X
Salesforce	X	X	X	X	X	
Savo	X	X	X	X		X
Seismic	X	X	X	X	X	X
SpringCM	X	X	X			X
Showpad	X	X	X	X	X	X

*SSO=single sign-on; **SAML=Security Assertion Markup Language; ***LDAP= Lightweight Directory Access Protocol

Source: Gartner (October 2016)

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Market Guide for SaaS-Based Predictive Analytics Applications for B2B Sales and Marketing"

Evidence

Gartner collected primary research directly from the vendors included in this Market Guide.

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