

Market Guide for Revenue Intelligence Platforms

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Initiatives: [Sales Operations](#); [Digital Commerce and CRM Sales Technologies](#)

Revenue intelligence platforms enhance sales force automation by capturing seller activity, measuring pipeline health and guiding sellers' next steps. Sales operations leaders supporting SFA technology solutions should use this Market Guide to review vendors and the key capabilities offered.

Overview

Key Findings

- The revenue intelligence market has emerged from conversation intelligence vendors looking to differentiate themselves with a broader set of capabilities and visually appealing deal analytics. In the past two years, the market has quickly expanded to include pipeline and forecast management vendors and startups.
- Vendors in this market attempt to differentiate themselves by delivering unique feature combinations – including forecast management, sales collaboration and sales force automation (SFA) enrichment – to B2B sales organizations.

Recommendations

Sales operations leaders supporting sales technology solutions must:

- Fully assess existing solutions from their SFA vendors to determine whether incremental investment in a revenue intelligence platform is warranted.
- Focus on the most impactful potential benefits by prioritizing vendors with deep activity intelligence capabilities, such as exposing the context of buyer and seller activity.
- Invest in data literacy programs to help sellers and managers understand the data signals captured by revenue intelligence platforms and how those signals affect sales metrics.

Strategic Planning Assumptions

- By 2026, 65% of B2B sales organizations will transition from intuition-based to data-driven decision making, using technology that unites workflows, data and analytics.
- By 2025, 70% of all B2B seller-buyer interactions will be recorded to extract competitive, deal and market insights using artificial intelligence (AI), machine learning (ML) and natural language processing (NLP).
- By 2025, 75% of B2B sales organizations will replace traditional sales playbooks with AI-based guided selling solutions.

Market Definition

Revenue intelligence platforms are third-party solutions that integrate sales force automation platforms with data from frontline revenue-supporting systems.

Predominantly used by B2B sales organizations, revenue intelligence platforms facilitate the capture of sales activities and coach sellers to quickly anticipate buyers' needs. This technology may incorporate data signals from sales, marketing and customer service activities, including digital and nondigital interactions. Revenue intelligence platforms use artificial intelligence or machine learning technology to amplify the value of commercial data, accelerate sales cycles and provide better visibility of pipeline performance.

Market Description

The revenue intelligence market is a convergence of functionalities seeing rapid growth. In the first half of 2021, Gartner fielded 193% more client inquiries on the topic of revenue intelligence than in the preceding six-month period. B2B sales organizations' interest in this market centers on core capabilities, which combine to improve sellers' and sales managers' ability to effectively manage their pipelines and close deals:

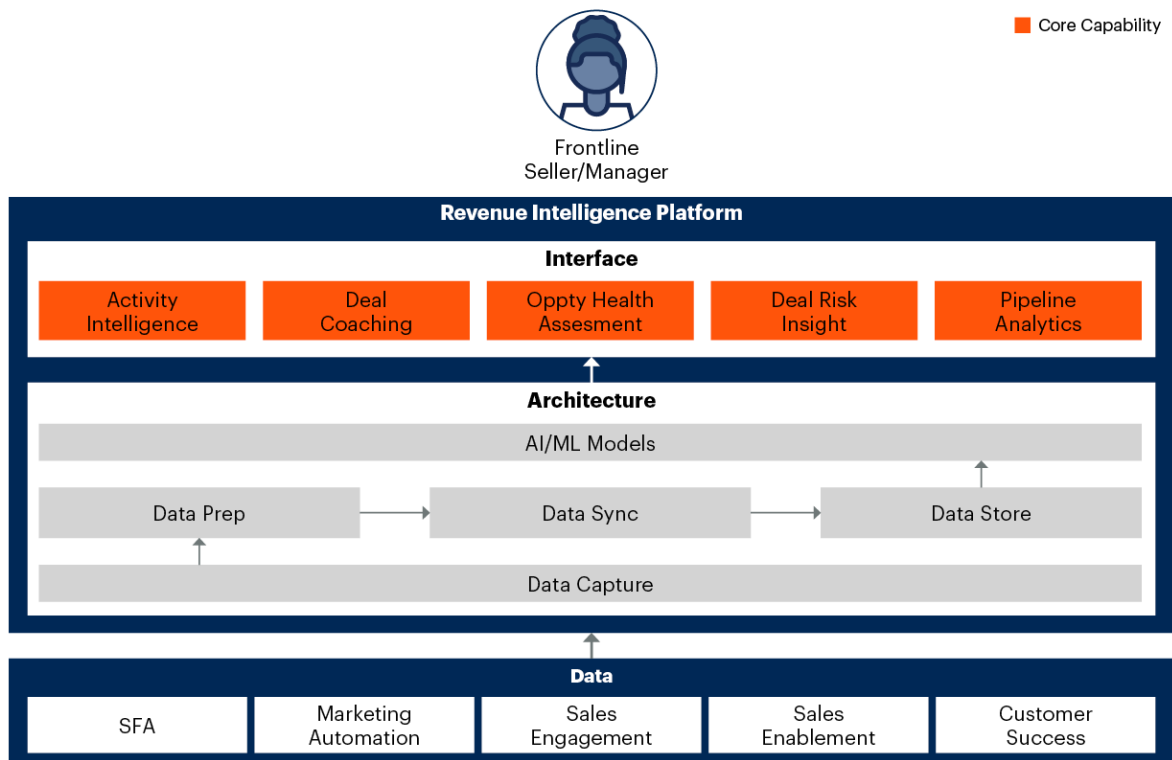
- **Activity intelligence** – Detecting deal-related activities in other systems, including email, calendars, web meeting platforms and team collaboration tools, then logging the activities in SFA and associating them with an account, contact, lead or opportunity
- **Deal coaching** – Driving seller efficiency and effectiveness by delivering feedback on deal-related efforts and prescriptive guidance – based on AI analysis – on what actions to take next
- **Opportunity health assessment** – Using activity information, combined with other deal attributes, to provide insight on the overall health of a deal

- **Deal risk insight** – Using augmented analytics to offer insight on the pipeline that sellers expect to close in a given period, in the form of either an AI-driven predictive forecast recommendation or a risk assessment for opportunities within each seller-selected forecast category
- **Pipeline analytics** – Offering sales managers a view of their teams’ pipelines that goes beyond what’s available in their native SFA applications; incorporating outcomes of activity intelligence and sales coaching to isolate risks and opportunities at the deal level

Revenue intelligence platforms capture, store and transform data from a variety of existing commercial applications (see Figure 1).

Figure 1: Revenue Intelligence Platform Core Capabilities

Revenue Intelligence Platform Core Capabilities



Source: Gartner
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Vendors in the revenue intelligence market target a range of commercial use cases where their technologies can improve sellers’ and sales managers’ effectiveness (see Note 1).

Top use cases include:

- Deal review – Revenue intelligence platforms use activity information to score or classify the health of a contact, lead or opportunity. Sales managers use the results to enrich deal reviews with additional insight. Sellers use them to uncover specific next steps based on signals and outcomes from similar selling scenarios.
- Pipeline review – Sellers use the health assessments provided by revenue intelligence to understand how to prioritize their time among their active accounts. Sales managers can compare deals’ potential risk levels with the activities sellers are conducting to mitigate those risks.
- Forecast evaluation and submission – Sales managers receive an additional perspective on deal risks and predicted outcomes as they prepare their recurring forecast submissions.
- Seller performance coaching – Sales managers can compare their sellers’ activity histories and deal outcomes to provide fact-based insight for ongoing performance coaching conversations.

Market Direction

The term “revenue intelligence” appeared in the market recently as a differentiation effort among conversation intelligence vendors to move into more advanced deal analytics by offering visualizations based on multiple sources of data – not just conversation data. The term was adopted by adjacent vendors in the B2B sales technology space that had similar capabilities in the pipeline and forecast management space. Now, a cadre of startups are in the market with their own spins, combining capabilities from both aforementioned groups.

The market is evolving rapidly. In the short term, we anticipate two notable developments: further solidification of standard features and further consolidation of vendors.

Solidification of Standard Features

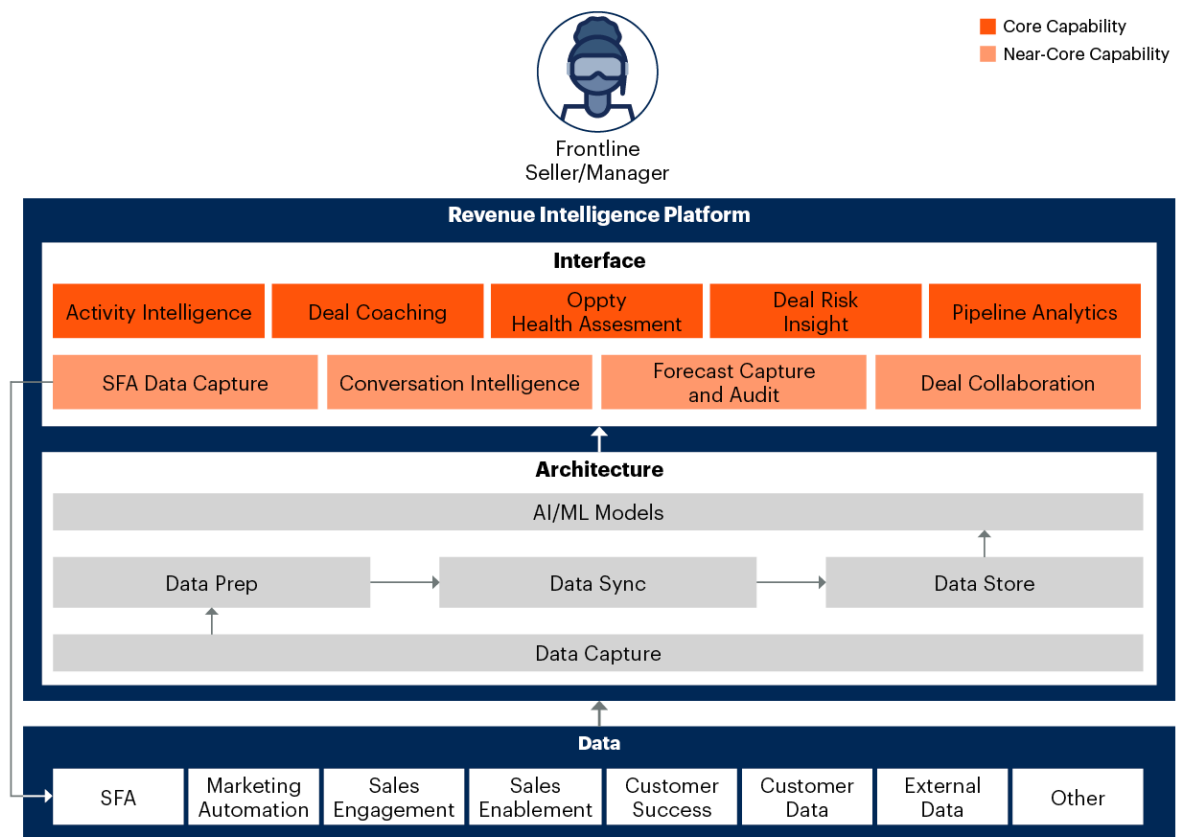
The following features have become “near core” as vendors expand their capabilities (see Figure 2):

1. **Sales collaboration** – Enabling members of a deal team to collaborate as they engage with customers on sales and support activities; may include integration with digital sales rooms and collaboration platforms such as Microsoft Teams

2. **SFA data capture** – Improving data quality by applying necessary updates to customer master data based on information captured from digital interactions or relationship intelligence; increases data quality while reducing seller burden
3. **Forecast capture and audit** – Allowing managers and leaders to submit a bottom-up sales forecast, aligned with the sales hierarchy; offers audit and analytics capabilities beyond native SFA features and serves as the system of record for forecast submissions

Figure 2: Revenue Intelligence Platform Core and Near-Core Capabilities

Revenue Intelligence Platform Core and Near-Core Capabilities



Source: Gartner
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Gartner.

Future developments to the existing core capabilities will include:

- Pipeline analytics evolving to include a catalog to describe available analytics content and its usage

- Opportunity health assessments maturing to offer automated insights, further supplementing deal-coaching capabilities
- Dynamic storytelling using AI and ML displacing predefined dashboards and manual data exploration for sellers and managers

As revenue intelligence vendors start ingesting customer and buyer engagement data from content, website properties and microsites, they will be able to experiment with using augmented analytics capabilities to send contextual recommendations and insights directly to buyers in the moment.

Consolidation of Vendors

Given the market for revenue intelligence platforms is relatively immature, vendors are ripe for M&A activity, especially from acquisitive sales technology companies in adjacent markets and SFA vendors. Integration with systems of engagement is critical for orchestrating – and maximizing the value of – the embedded analytics systems emerging in the market today. (Embedded analytics has advanced to the Slope of Enlightenment within the [Hype Cycle for CRM Sales Technology, 2021](#).)

Some acquisitions have already occurred among the vendors identified in this Market Guide (see [Impact of ZoomInfo's Acquisition of Chorus](#)). We expect other vendors to follow a similar blueprint, building a portfolio of capabilities for the full sales process, either through development or acquisition.

Market Analysis

Fundamentals: An Accurate View of Deal Engagement

The present market focuses on developing trust and data literacy for the front line by deploying augmented analytics for fundamental use cases such as deal management and pipeline inspection. Specifically, revenue intelligence platforms simplify how data (especially activity) is captured, prepared, synced, stored, presented and acted upon. Data capture has long been the thorn in the side for many sales leaders, so simplifying that process is an essential capability.

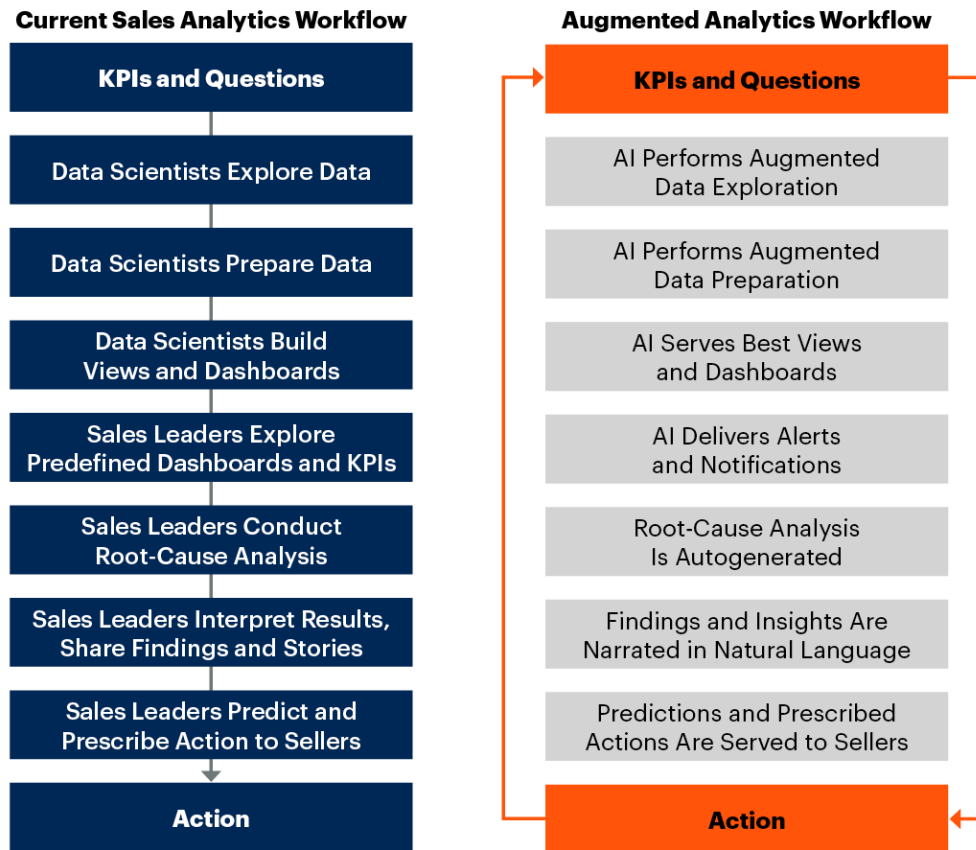
Revenue intelligence platforms commonly use conversation intelligence to address this pain point. Conversation data is essential to revenue intelligence platforms because it promises insight into the sentiments, topics, players, and engagement of buyers and sellers in sales conversations. Consider that the average 30-minute sales call contains over 3,500 spoken words. Thorough sellers may enter 50 words into their meeting notes, and the rest of that potential intelligence is simply lost. Revenue intelligence platforms, on the other hand, can use conversation data to acquire voice-of-the-customer data at scale, structure it for analysis using AI or ML, and make nuanced but valuable recommendations for next best actions.

Purpose-Built Augmented Analytics

Revenue intelligence technologies are purpose-built to address the most common roadblocks faced by sales analytics leaders by providing augmented analytics capabilities (see Figure 3). These solutions apply AI or ML models to democratize data science by empowering “citizen analysts” and amplify value through effective visualizations. The end result is that insights become easily available to audiences that commonly struggle to get the data they need during their everyday work.

Figure 3: Current Sales Analytics Workflow vs. Augmented Analytics Workflow

Current Sales Analytics Workflow vs. Augmented Analytics Workflow



Source: Gartner
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For more information, Gartner’s [2021 Strategic Roadmap for Sales Analytics](#) highlights how sales operations leaders can use augmented analytics to offer sellers and managers actionable insights using signals captured from various buyer interactions.

Vendors in this market find success with midmarket and small and midsize B2B technology companies as early adopters of the technology. But Gartner expects enterprise sales analytics leaders to turn to revenue intelligence platforms to narrow the gap in their analytics programs. These vendors offer an excellent alternative to advance their programs without access to data science resources and/or enterprise BI analyst resources.

Improved Data Literacy via Embedded Analytics

One of the top inhibitors to effective data-driven decision making is low sales team data proficiency levels, especially among frontline sales managers and direct sellers. ¹ Revenue intelligence platforms provide embedded analytics within sellers' and frontline managers' natural workflows. They will also continue to develop different ways for sellers and frontline managers to uniquely interact with insights. For example, email digests can help frontline managers understand which deals to focus on, which sellers to engage and why. And sellers can see key analytics directly within their deals, such as highlighting how engaging with contacts absent within particular deals will increase their win rates.

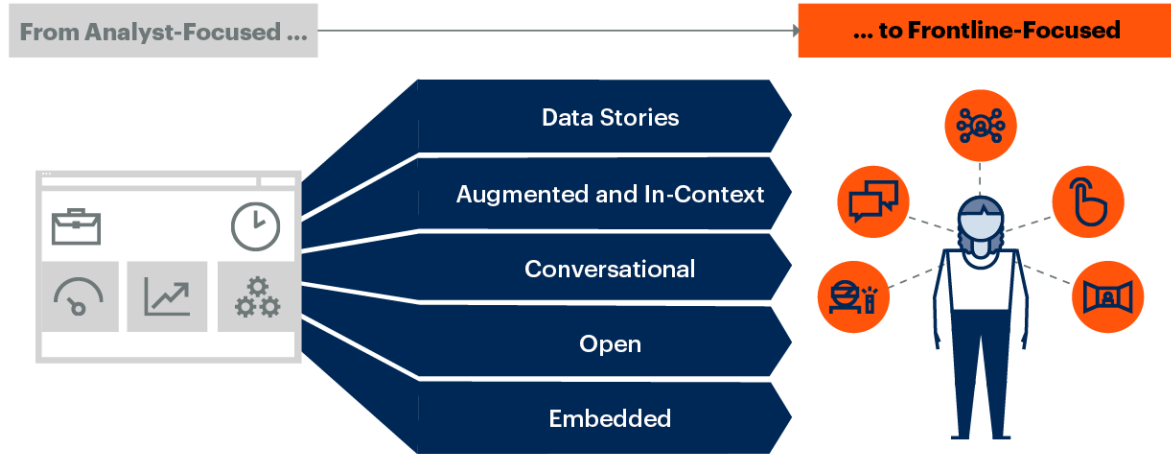
The Decline of the Dashboard and the Rise of Data Stories

Gartner predicts analytics and business intelligence (ABI) platforms will begin focusing on dynamic data storytelling to make insights more accessible and timely. ² The burden is shifting away from sellers "getting smarter about data" and toward analytics leaders making it easier for sellers to understand and act on data.

Revenue intelligence must meet the UX needs of both frontline sellers and their managers. Since these roles urgently need relevant insights, there's more pressure for vendors to provide ways to use data stories or embedded analytics to benefit both roles. More revenue intelligence vendors will double-down on the different interfaces through which sellers interact with embedded analytics signals. For example, vendors may offer a chat-like interface for sellers to prioritize what to do on a given day, or a voice-enabled assistant for frontline managers to answer questions about a forecast. The focus on these tools will signal an end to analyst-heavy dashboard creation and align with Gartner's anticipated rise of the augmented frontline seller/manager (see Figure 4).

Figure 4: The Rise of the Augmented Frontline Seller/Manager and the Decline of the Dashboard

The Rise of the Augmented Frontline Seller/Manager and the Decline of the Dashboard



Source: Gartner
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Gartner

Revenue intelligence platforms are effective technologies for adopting data storytelling, especially to engage and support the cadence of managing a sales organization. Augmented analytics systems are now capable of detecting anomalies and generating headline-based output to draw users’ attention to the findings. ³

As data storytelling automation develops to support more complex narrative techniques, expect revenue intelligence vendors to experiment with different ways to present insights to sellers, managers and entire teams. These insights will be useful but also visually appealing. Imagine a forecast that automatically generates a video presentation, similar to a Facebook birthday video compilation or a Spotify playlist of the year’s top music, complete with voice narration and animation.

BYOD as a Differentiator

A key differentiator to track among vendors in the market will be acceptance of bring your own data (BYOD) approaches, where customers bring their own data into vendors' AI and ML models. Incorporating more data sources and using more flexible models within different resources throughout an enterprise will be crucial to winning more complex deals. Sales organizations need to incorporate unique data points such as products, ERP, or proprietary scoring and models built within the enterprise. Most vendors don't offer this today, and if they do, it's often customized or a one-off offering to win deals.

Ultimately, the evolution of activity intelligence can't be tied only to seller activities. We expect revenue intelligence vendors to expand their integrations with other platforms to detect digital customer interactions and associate them with opportunities, accounts or contacts. This growth will require a flexible and extensible architecture to allow for easy integration with an array of source systems. Conversation intelligence is a case in point; not all vendors can apply that information to manager coaching, guided selling, opportunity scoring and forecast recommendations.

The Convergence of Data Science and Revenue Intelligence

Eventually, revenue intelligence vendors will compete with a company's enterprise data science capabilities. Vendors in the augmented analytics tools market are accelerating the convergence between ABI platforms and data science to help enterprises create more citizen data scientists and business users. ⁴ Similar to revenue intelligence's focus on simplifying data capture, preparation, synchronization and storage, augmented analytics tools automate how common data tasks are organized (referred to as "augmented data prep"). They also offer prebuilt advanced analytics tools to help business users utilize advanced analytics without requiring a team of analysts or expert data scientists.

Gartner expects the market for augmented analytics tools will evolve to emphasize more specific data capabilities and domain-specific expertise. Revenue intelligence vendors are similarly designed to help sales operations leaders address data tasks without the help of BI and data science.

The value proposition for revenue intelligence platforms is based on sales analytics teams' frustration with using an SFA system to store data and their inability to access all the unstructured data. As the digitalization of buying continues and sales leaders must increasingly share data across different enterprise functions, it's plausible they might commandeer augmented analytics tools instead of revenue intelligence to address their more unique analytics needs. This dynamic could open up collaboration potential between the chief revenue officer and the chief data officer in the future.

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.

Market Introduction

Use Table 1 as a quick reference guide to the names of representative vendors and their revenue intelligence platform solutions (see Note 2). These vendor offerings do not necessarily integrate with all commonly available SFA applications.

Table 1: Representative Vendors of Revenue Intelligence Platforms

(Enlarged table in Appendix)

Vendor ↓	Product Name ↓
Aviso	AI Guidance Platform
BoostUp	BoostUp
Clari	Revenue Operations Platform
Collective[i]	Collective[i]
Ebsta	Revenue Intelligence Platform
Gong	Revenue Intelligence Platform
InsightSquared	Revenue Intelligence Platform
People.ai	Revenue Operations & Intelligence (ROI)
Revenue Grid	Guided Selling
SalesChoice	Insight Engine
SalesDirector.ai	SalesDirector.ai
Salesloft	Modern Revenue Workspace
Xactly	Intelligent Revenue Platform
ZoomInfo	Momentum

Source: Gartner (October 2021)

Market Recommendations

In response to the continuing development of the revenue intelligence market, sales operations leaders supporting SFA technology solutions should take a few short-term steps to assess their need for a revenue intelligence platform. ³

Assess Existing SFA Capabilities

Sales operations leaders must fully assess existing solutions from the SFA vendors themselves (see [Magic Quadrant for Sales Force Automation](#)). Most of the core capabilities in this market may already be addressed by SFA vendors; however, differences will arise in the extent of the features and the amount of configurability available to the administrator. The other difference will be in the way SFA solutions package functionalities – in many cases, the core functionalities of revenue intelligence platforms – as add-on features. SFA administrators who need more flexibility when selecting and prioritizing data signals for predictive and prescriptive uses will be better-served by revenue intelligence platforms. The other area that may differ is the depth of activity intelligence and data capture.

Prioritize Vendors Based on Core Capabilities

First, prioritize vendors with deep activity intelligence capabilities, such as exposing the context of the activity – in other words, going beyond an email header as a signal and extracting the communication within the email. Using such context as a signal will allow for a more robust measure of deal risk.

Secondly, understand how vendors develop their respective opportunity health scores and alert capabilities. Consider the data signals that drive opportunity health scores and assessments and the ability to configure the various elements to industry, user needs and circumstances. Most vendors are not currently robust in this ability but will improve in the coming years.

Third, look at vendors who can capture not only written communication but also live conversation. These capabilities improve seller effectiveness and sales management coaching.

Ensure Value by Investing in Data Literacy Programs

Sales operations leaders must deliver data literacy programs so frontline sellers and managers better understand the data signals captured and analyzed and how they affect KPIs and sales metrics. Of particular interest to sales organizations will be more embedded workflow analytics solutions that provide analytics insights that help sellers progress their deals. The consumption of analytics solutions is important for multiple reasons: to improve data literacy, to improve sales efficiency by negating the need for multiple applications to glean insights and to accommodate different work style preferences.

Evidence

¹ 2020 Gartner State of Sales Operations and Analytics Survey: We surveyed 299 heads of sales operations and sales analytics in the U.S., the U.K., Canada and Australia to measure key priorities for data quality, data governance and cross-functional interactions. Companies with less than \$25 million in revenue or with no sales operations function were excluded from the sample.

² [Top Trends in Data and Analytics for 2021: The Rise of the Augmented Consumer.](#)

³ [Augmented Analytics: Teaching Machines to Tell Data Stories to Humans.](#)

⁴ [Market Guide for Augmented Analytics Tools.](#)

Note 1: Gartner's Initial Market Coverage

This Market Guide provides Gartner's initial coverage of the market and focuses on the market's definition, rationale and dynamics.

Note 2: Representative Vendor Selection

Gartner sizes the market at 14 vendors that meet the core capabilities as outlined in this guide and that receive interest from our clients (searches on Gartner.com and inquiry).

Recommended by the Authors

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

[Introduction to AI for Sales](#)

[Cool Vendors in Conversation Intelligence for B2B Sales](#)

[Infographic: The Revenue Tech Stack](#)

[Magic Quadrant for Sales Force Automation](#)

[Critical Capabilities for Sales Force Automation](#)

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