



# SALES TOOLS

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



# Introduction

The sales landscape has fundamentally changed. Technology isn't just a nice-to-have anymore. It's the competitive advantage that separates top performers from the rest. Sales teams that strategically leverage the right tools consistently outpace those who don't, plain and simple.

In 2026, the question isn't whether to adopt sales technology, but which solutions will actually move the needle for your business. With AI-powered copilots, sophisticated revenue operations platforms, and increasingly intelligent automation tools entering the market, the modern sales tech stack has evolved from a collection of point solutions into an integrated ecosystem designed to amplify human expertise.

But here's the challenge: the explosion of new tools has made building that stack more complex than ever. That's why we've created this guide

Today's top salespeople combine intuition with data-driven insights to identify the right prospects, reach out at the right time, and personalize at scale. The right technology eliminates administrative work, freeing salespeople to focus on building relationships and delivering value.

The market continues to grow rapidly, with new solutions launching constantly, each claiming to be the key to sales efficiency and success. The opportunity is enormous for teams that get their tech stack right, but the overwhelming number of options can lead to analysis paralysis.

Every year, we test and try these tools. And every year, we publish our findings. In this eBook, we've listed 158 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 a new category: AI Agent 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!

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# How to choose your sales tech stack

The sales toolkit has entered the AI era. What once required just a phone and a contact list now involves an ecosystem where AI agents, copilots, and automation platforms promise to handle everything from prospecting to deal analysis. Today's sales rep toggles between an average of a dozen different apps daily, and that number keeps climbing.

Here's the real problem: AI hasn't simplified sales tech—it's made it more complicated. Every platform now has an "AI assistant," every workflow claims to be "AI-powered," and sales teams are caught between AI hype and practical reality. Context switching between tools still kills productivity, software costs continue to soar, and leadership is wrestling with a critical question: Which AI investments actually deliver ROI, and which are just expensive experiments?

In 2025, the challenge isn't finding AI-powered technology. It's separating genuine innovation from rebranded features, and building a stack where AI actually augments your team instead of adding complexity. With over 10,000 vendors in the market and new AI solutions launching daily, the paradox of choice has never been more real.

## **Start with problems, not promises**

Before evaluating any vendor's AI capabilities, ask: What's actually broken? Where are deals dying? What's causing your team to miss quota? The most successful tech stack decisions happen when sales, marketing, and revenue operations align on shared pain points first, then evaluate which solutions—AI or otherwise—can address them.

## **Evaluate AI critically**

Every vendor now claims AI capabilities, but not all AI is created equal. Ask specific questions: What problem does this AI actually solve? Does it require clean, structured data to work effectively? Will it integrate with your existing stack, or does it require yet another platform? Be especially wary of "AI-powered" features that are just basic automation or rules-based logic rebranded for the AI era.

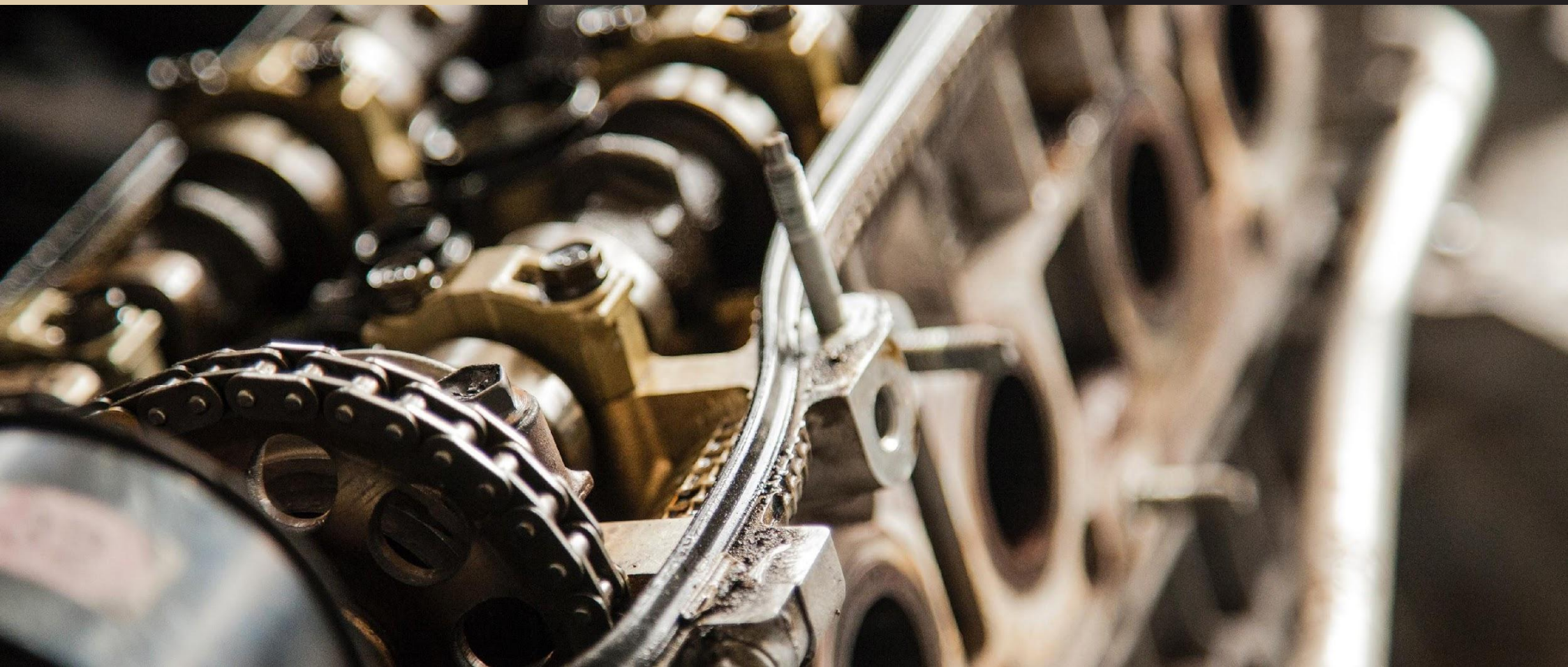
## **Prioritize cross-functional alignment**

The key to choosing the right tools is collaboration between departments to identify common needs and prioritize investments that deliver measurable impact. AI tools are most powerful when they serve shared workflows, not departmental silos.



01

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, and automate communication.

### **The AI transformation**

What was once simply a database for customer information has evolved into an intelligent sales operating system. In 2026, AI has fundamentally transformed what CRMs can do.

Modern CRMs now leverage AI to predict customer behavior, automatically score and prioritize leads, generate personalized outreach at scale, and surface insights that would take human analysts weeks to uncover.

AI agents embedded within CRMs can now autonomously handle routine tasks like data entry, meeting scheduling, and follow-up reminders. Natural language processing allows sales teams to update records through voice commands or chat, while predictive analytics forecast deal closure probability with unprecedented accuracy. Some platforms even offer AI-powered deal coaching, analyzing past wins and losses to recommend optimal next steps for active opportunities.

### **Choosing the right CRM**

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 and comprehensive AI suites. On the other hand, there are some strong players in local markets designed for small and medium enterprises, many now offering AI features that rival the enterprise platforms at a fraction of the cost.

When evaluating CRMs in 2026, consider not just the features available today, but the vendor's AI roadmap and their ability to adapt as AI technology continues to evolve at a rapid pace.

## | CRM



### Odoo CRM

Odoo's open-source CRM, part of its broader business suite, now embeds generative-AI assistants, predictive lead-scoring and automated data enrichment. These AI tools transform manual sales and service tasks into intelligent workflows, helping teams qualify leads faster and focus on the highest-value opportunities.

[odoo.com](https://odoo.com)



### Monday.com

Monday.com extends its "Work OS" with CRM capabilities enhanced by embedded AI tools. Teams can now use AI-powered task creation, pipeline visualisation and scheduling assistance to automate workflows, surface insights and optimise collaboration across sales and marketing.

[monday.com](https://monday.com)



### Dynamics 365

Microsoft's enterprise CRM platform has evolved into an AI-powered revenue engine. It uses Copilot and generative-AI features to deliver sales forecasts, suggest next-best actions, draft outreach messages and summarise calls — all while deeply integrating with Microsoft 365 and Power Platform for end-to-end intelligent automation.

[dynamics.microsoft.com](https://dynamics.microsoft.com)



### Freshsales CRM

Freshsales, part of the Freshworks suite, is powered by its proprietary Freddy AI. Freddy provides auto-lead scoring, deal insights, forecasting suggestions and generative email assistance, helping sales teams focus on the most promising prospects and close deals faster.

[freshworks.com](https://freshworks.com)



## | CRM



### HubSpot Smart CRM

HubSpot's free-to-start CRM now includes AI-powered content generation, predictive lead scoring, email drafting and behavioural analytics. Its Smart CRM connects marketing, sales and service data to enable AI-driven automation, personalised campaigns and efficient revenue operations.

[hubspot.com/products/crm](https://hubspot.com/products/crm)

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### Attio

Attio is a modern, relationship-centric CRM designed for startups and SMBs. Built on a collaborative data model, it increasingly incorporates AI for dynamic updates, real-time insights and automated contact enrichment — enabling teams to manage relationships with smarter, data-driven context.

[attio.com](https://attio.com)



### Pipedrive

Pipedrive is a sales-first CRM featuring a visual pipeline interface, now augmented by an AI Sales Assistant. The assistant recommends next steps, drafts follow-up messages, identifies at-risk deals and surfaces performance insights — turning pipeline management into an intelligent, guided process.

[pipedrive.com](https://pipedrive.com)

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### Zero

Marketed as the “zero-click CRM”, this AI-powered system automates everything from data entry to opportunity discovery. It relies on autonomous agents to enrich records, identify your next best customer and execute sales tasks automatically — designed for fast-growing companies that value minimal manual work.

[zero.inc](https://zero.inc)

## | CRM



Salesforce

Salesforce's market-leading enterprise CRM is powered by its Einstein AI engine. It provides intelligent forecasting, opportunity scoring, auto-summarisation and Copilot-style conversational interfaces that automate workflows and integrate deeply across sales, service and marketing clouds.

[salesforce.com](https://salesforce.com)

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Planhat CRM

Planhat is an AI-native customer-platform designed to drive retention and growth. It uses large-language-model agents to generate summaries, automate opportunity creation, enrich contacts and integrate seamlessly into AI-based workflows — enabling proactive, data-driven customer success.

[planhat.com](https://planhat.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 through AI capabilities and integrations with other apps and platforms. Make sure you pick one CRM that won't limit you down the road—potential integrations and AI scalability are as important as current features.

A CRM, however, isn't worth much without fresh, reliable data in it. Even the most advanced AI features depend on quality data to deliver accurate insights. Look into feeding real-time company data into your CRM to enrich and expand your database. Plugging Vainu into your CRM ensures your system is up to date with powerful company information that makes your salespeople and AI more productive.

## | CRM: BONUS - STRONG PLAYERS IN THE NORDICS



Lime

This Swedish-built CRM covers contacts, deals and case management, now enhanced with AI-driven alerts, automated follow-ups and workflow suggestions. Lime's intelligence layer helps Nordic sales teams act on customer signals faster and maintain high-quality relationships.

**[lime-crm.se](https://lime-crm.se)**



WebCRM & Tribe CRM by Efficacy

WebCRM and Tribe CRM, both part of Efficacy's cloud CRM suite, help European businesses manage customer relationships efficiently and securely. WebCRM focuses on account management and marketing with AI-driven insights and automation, while Tribe CRM offers a collaborative, modular platform that unites sales, marketing, and service around a shared customer view.

**[webcrm.com & tribecrm.eu](https://webcrm.com & tribecrm.eu)**

# Upsales

Upsales

Upsales combines CRM, marketing automation and analytics in one platform. It now integrates AI-driven lead-prioritisation, real-time notifications and predictive insights that help Nordic B2B sales teams focus on high-value accounts and stay ahead in competitive markets.

**[upsales.com](https://upsales.com)**



SuperOffice CRM

SuperOffice unifies sales, marketing and service into a single digital profile. Its AI-guided insights suggest next-best actions, identify engagement patterns and provide productivity recommendations, enabling revenue teams to operate more effectively across the full customer lifecycle.

**[superoffice.com](https://superoffice.com)**









# Sales Intelligence and Prospecting



## | SALES INTELLIGENCE AND PROSPECTING

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 scale.

### **AI is redefining sales intelligence**

What once required hours of manual research can now happen in seconds. AI has transformed sales intelligence from a data lookup tool into a proactive insights engine. Modern platforms use machine learning to analyze millions of data points, identify patterns invisible to human researchers, and automatically surface the most relevant prospects for your specific needs.

AI-powered sales intelligence platforms now predict which companies are most likely to buy based on behavioral signals, technographic data, and buying intent. Natural language processing extracts key insights from news articles, job postings, and financial reports, delivering context-aware alerts when prospects show signs of being in-market.

Some platforms even generate personalized talking points and outreach messages based on the prospect's recent activities and business challenges.

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. AI doesn't just speed this up—it discovers opportunities and connections that salespeople would never find manually.



## | SALES INTELLIGENCE AND PROSPECTING



Vainu

Vainu helps salespeople and marketers 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 AI Agents track relevant company changes and puts CRM tasks on autopilot.

**[vainu.com](https://vainu.com)**

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Clay

Clay is a dynamic sales intelligence platform that enables teams to build custom workflows, enrich prospect data in real-time and automate personalised outreach—leveraging automation and intelligence to help sales professionals engage higher-quality leads efficiently.

**[clay.com](https://clay.com)**



Lusha

Lusha provides accurate B2B contact intelligence—direct phone numbers and email addresses—now enhanced with AI-driven enrichment and integration tools to streamline prospecting via platforms like LinkedIn and Salesforce, enabling faster, smarter outreach.

**[lusha.com](https://lusha.com)**

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Seamless.ai

This advanced AI-powered sales intelligence platform delivers verified contact and company data, automates lead generation workflows and integrates with major CRMs—helping sales teams improve productivity and close deals faster through intelligent automation.

**[seamless.ai](https://seamless.ai)**

## | SALES INTELLIGENCE AND PROSPECTING



Dealfront

Dealfront, tailored for the European market, combines GDPR-compliant B2B data from Echobot and Leadfeeder with intelligent tools and workflows—enabling sales and marketing teams to prioritise, engage and penetrate European account markets with data-enabled precision.

[dealfront.com](https://dealfront.com)



Apollo.io

Apollo provides a comprehensive sales engagement platform featuring a large B2B contact database (270 M+ contacts), enriched with AI-driven prospecting tools, analytics and automation to help users find, engage and convert leads more effectively.

[apollo.io](https://apollo.io)



Cognism

Cognism offers a globally compliant database of companies and contacts, now enhanced by its AI engine (e.g., "Cortex") that powers lead-scoring, intent detection and outreach recommendations—making it easier for businesses to find target accounts by size, industry or tech-stack with AI-enabled precision.

[cognism.com](https://cognism.com)



LinkedIn Sales Navigator

LinkedIn's premium Sales Navigator tool enables users to build tailored prospect lists based on job titles and responsibilities, monitor relevant professional discussions and leverage platform intelligence—helping sales teams engage more meaningfully and identify decision-makers faster.

[business.linkedin.com/sales-solutions/sales-navigator](https://business.linkedin.com/sales-solutions/sales-navigator)

## | SALES INTELLIGENCE AND PROSPECTING



Kaspr

Kaspr offers a B2B contact-data platform with a LinkedIn Chrome extension, providing access to verified phone numbers and email addresses and integrating into prospecting workflows in minutes. While less explicitly branded for AI, it supports real-time enrichment and workflow automation to accelerate outreach.

[kaspr.io](https://kaspr.io)



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](https://zoominfo.com)



ChatGPT / Gemini / Claude / Other LLMs

ChatGPT, Gemini, Claude, and other LLMs are transforming sales intelligence and prospecting by analysing CRM data, identifying intent signals, and generating personalized outreach. Acting as AI co-pilots, they enrich prospect data and automate workflows to turn insights into pipeline growth.

[chatgpt.com](https://chatgpt.com) [gemini.google.com](https://gemini.google.com) [claude.ai](https://claude.ai)



Dun & Bradstreet

With nearly 200 years of experience, Dun & Bradstreet now powers its “D&B.AI” enterprise suite built on verified global corporate data, embedding autonomous AI agents and generative-AI insights to enable multi-agent workflows, real-time decisioning and data-driven action.

[dnb.com](https://dnb.com)



## SALES INTELLIGENCE AND PROSPECTING

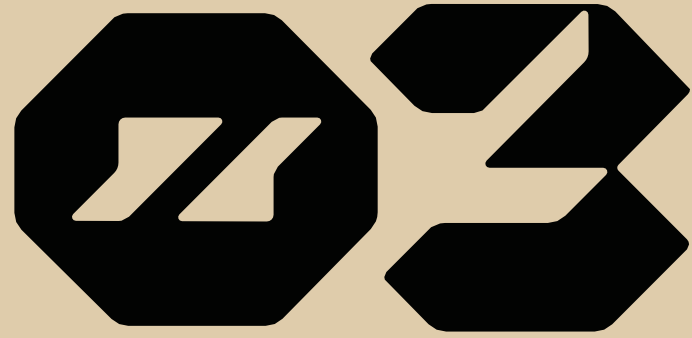
### In a nutshell

Sales managers and marketers are increasingly using data and insights from sales intelligence software to define and implement strategies. AI amplifies this by turning raw data into actionable intelligence automatically. The need to combine external and internal data makes integrations a critical characteristic of any sales intelligence platform worth its salt.

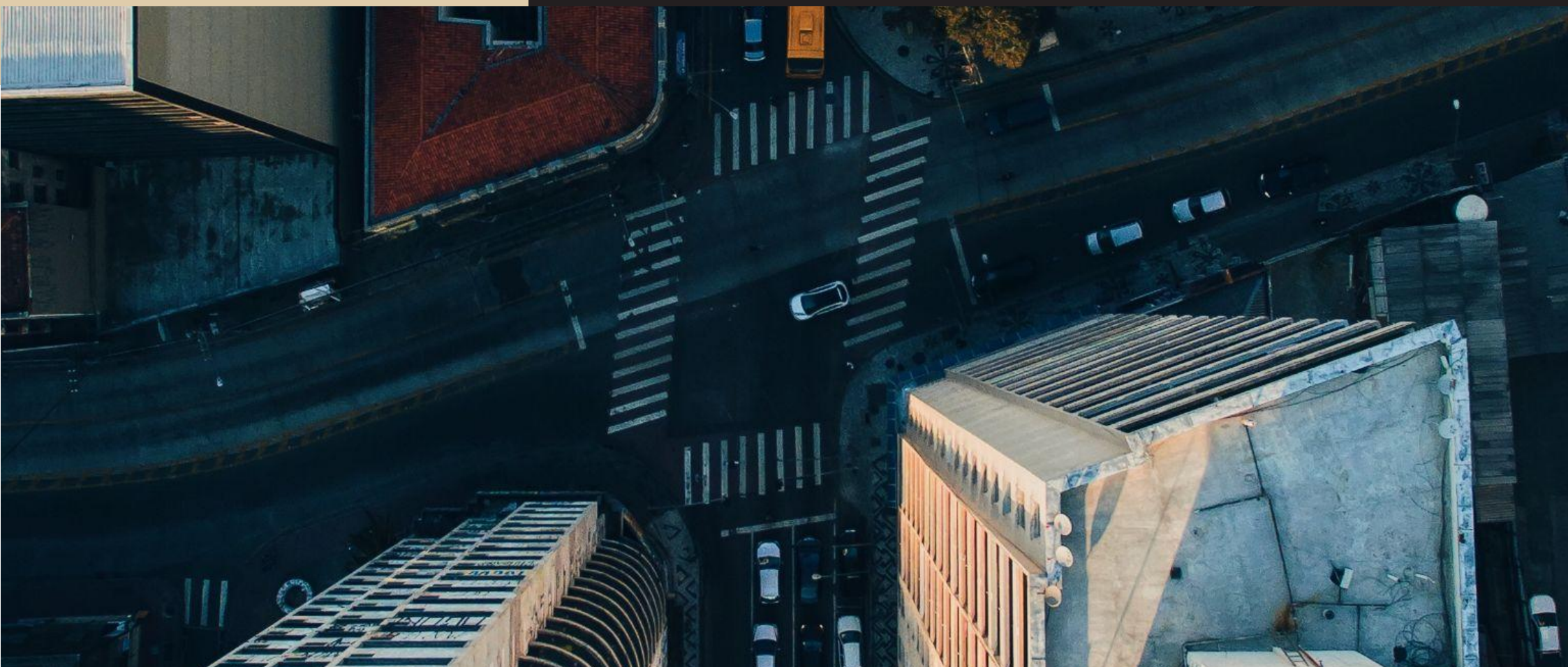
With the addition of new datasets, AI-powered trigger events are making prospecting more effective and specialized. Machine learning correlates these diverse data points to predict which signals actually indicate buying readiness.

**Want to see Vainu AI Agents in action?**  
**Go to [vainu.com](https://vainu.com) and set up a free trial.**





# 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.

### **Automation meets intelligence**

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.

In 2026, AI has elevated this automation from scheduled sequences to intelligent orchestration. Modern sales engagement platforms use AI to determine the optimal time to reach out, the best channel to use, and even predict which message variants will perform best for each recipient. AI analyzes response patterns to automatically adjust cadence timing and frequency, ensuring outreach feels natural rather than robotic.

### **Personalization at scale, powered by AI**

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.

AI has made true personalization at scale finally achievable. Generative AI can now craft unique, contextually relevant messages for each prospect by analyzing their company news, social media activity, and previous interactions. Natural language processing ensures the tone and complexity match the recipient's communication style, while AI-powered sentiment analysis helps reps understand how prospects are responding emotionally to outreach.

## | SALES ENGAGEMENT

### Salesloft.

Salesloft

Salesloft's comprehensive sales-engagement platform now integrates AI chat-agents, predictive workflows and revenue intelligence to drive pipeline growth and accelerate outcomes. Its AI-driven assistant surfaces next-best actions, engages visitors via chat agents and helps sellers focus on revenue-impacting activities.

[salesloft.com](https://salesloft.com)



HubSpot Sales Hub

HubSpot Sales Hub embeds AI agents and guided-selling tools within its CRM to streamline outreach, scoring and forecasting. It includes an AI prospecting agent, automated meeting prep, lead scoring and personalised email generation—helping sales teams engage smarter and close faster.

[hubspot.com/products/sales](https://hubspot.com/products/sales)



Outreach

Outreach has evolved into an AI-powered Revenue Workflow platform that unifies prospect engagement, retention and revenue intelligence with integrated AI agents. Features include deal-risk prediction, account summaries, call transcription and guided seller actions across multichannel workflows.

[outreach.io](https://outreach.io)



Apollo.io

Apollo.io presents itself as an AI sales platform for modern teams—leveraging large B2B data, AI-driven lead-scoring, automated sequences and an “AI Assistant” that orchestrates end-to-end workflows from prospecting through deal execution.

[apollo.io](https://apollo.io)

## | SALES ENGAGEMENT



Heyreach

HeyReach is a multi-account sales-engagement tool for LinkedIn-based outreach, automating campaigns and account rotations at scale while integrating advanced personalization and workflow automation—designed to boost LinkedIn response rates and outreach efficiency.

[heyreach.io](https://heyreach.io)



Instantly.ai

Instantly.ai's sales-engagement platform is engineered for cold-email automation at scale, leveraging an AI Reply Agent to classify inbound replies, craft responsive drafts and automate lead qualification in under 5 minutes.

[instantly.ai](https://instantly.ai)



Smartlead.ai

Smartlead.ai focuses on AI-powered cold-email outreach, providing advanced personalization, automated follow-ups and deliverability optimization. Its AI engine categorizes leads, drafts tailored messages and automates sequences across unlimited mailboxes to scale outreach effectively.

[smartlead.ai](https://smartlead.ai)



lemlist

Lemlist empowers sales teams with a multichannel outreach stack—spanning email, LinkedIn and video—and now incorporates AI Variables and generative-outreach workflows so you can automate hyper-personalised sequences and scale replies effectively.

[lemlist.com](https://lemlist.com)



## | SALES ENGAGEMENT



Regie-One

Regie.ai is an AI-native sales engagement and content creation platform that uses generative AI and autonomous agents to plan, write, and optimize multichannel outreach. Its AI engine drafts hyper-personalized sequences, adapts tone and timing to each prospect, and continuously learns from engagement data to improve conversion rates.

[regie.ai](https://regie.ai)



Amplemarket

Amplemarket combines sales intelligence, automation, and generative AI to help teams identify prospects, craft tailored outreach, and close more deals. Its AI-powered prospecting engine enriches leads, predicts buying intent, and generates personalized messaging sequences that adapt dynamically to engagement signals.

[amplemarket.com](https://amplemarket.com)

## | SALES ENGAGEMENT



Reply.io

Reply.io is a sales-engagement platform that automates multichannel outreach (email, calls, social), enhanced with AI SDR agents, AI-generated sequences and variables, plus automation workflows to personalise outreach and track engagement intelligently.

[reply.io](https://reply.io)

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Engage by Zoominfo

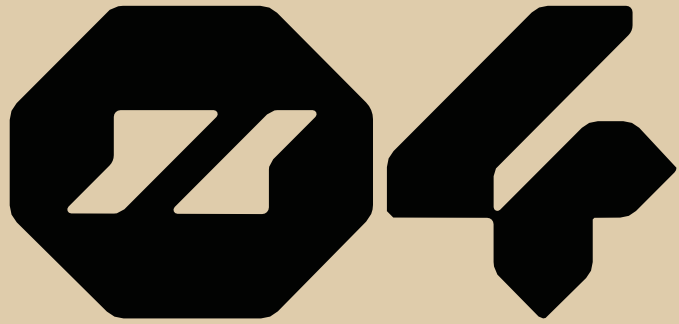
Engage by ZoomInfo delivers a sales-engagement suite built on top of its intelligence platform, integrating generative-AI features (such as post-meeting summaries, workflow automation and AI Copilot recommendations), enabling outreach automation, multi-channel communication and enriched insights to engage prospects at scale.

[zoominfo.com/products/engage](https://zoominfo.com/products/engage)

### In a nutshell

B2B sales engagement tools are transforming how sales teams interact with prospects and customers. These platforms 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 play a pivotal role, analyzing buyer behavior and engagement patterns to help sales teams tailor their messaging and approach. Predictive analytics identify the best times, channels, and strategies for outreach, increasing the chances of meaningful interactions and conversions.



# Sales Enablement & Digital Sales Room



Data has a better idea

## | SALES ENABLEMENT & DIGITAL SALES ROOM

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

With these larger sales processes, customer-facing digital portals and microsites are gaining significant 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.

### **AI-powered enablement and engagement**

AI is transforming digital sales rooms from passive document repositories into intelligent collaboration spaces. Modern platforms use AI to recommend the most relevant content for each stakeholder based on their role, industry, and stage in the buying journey. When a prospect views materials, AI can automatically surface related resources or suggest next steps to the sales team.

Generative AI now assists in creating personalized proposals, mutual action plans, and business cases directly within digital sales rooms. These AI-generated documents pull from successful past deals, automatically customize value propositions, and adapt ROI calculations based on the prospect's specific situation.

Some platforms even use AI to analyze stakeholder engagement patterns and alert sellers when key decision-makers aren't engaging—or when champions are losing influence.



## | SALES ENABLEMENT & DIGITAL SALES ROOM



Seidat

Seidat's cloud-based slide-deck platform now includes AI-powered automation that helps teams generate interactive presentations, personalize content at scale and integrate real-time data from CRM actions. Its AI-driven tools accelerate content creation and connect presentation assets with customer engagement analytics.

[seidat.com](https://seidat.com)



Dock

Dock is an AI revenue-enablement and digital sales-room platform that combines deal rooms, an "Enablement Agent", AI-generated documents and deep analytics. It turns call recordings and content into summaries, business cases and mutual action plans so sellers and buyers can collaborate in a single intelligent workspace.

[dock.us](https://dock.us)



GetAccept

GetAccept's all-in-one sales-enablement and digital sales-room platform uses AI agents to handle tasks like meeting-summaries, deal-document generation and personalized buyer content. The platform leverages AI across proposal creation, tracking buyer behavior and guiding sellers toward deal-closing actions.

[getaccept.com](https://getaccept.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](https://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](https://showell.com)

### Seismic

Seismic

Seismic's AI-powered Enablement Cloud combines Aura Copilot, role-play agents and Storytelling Platform capabilities to automate content creation, personalise delivery across channels and provide AI-driven coaching and analytics — equipping customer-facing teams to run smarter, more impactful buyer conversations.

[seismic.com](https://seismic.com)



Highspot

Highspot offers a unified enablement platform with two integrated AI suites designed to scale content, coaching and buyer engagement. Leveraging generative-AI via “Nexus”, it enhances content personalization, multilingual support and rapid feature release to bolster seller productivity.

[highspot.com](https://highspot.com)

### Aligned

Aligned

Aligned offers an AI-powered digital sales room and buyer-seller collaboration workspace. Its unified, intelligent workspace centralises content, timelines and communication, while AI surfaces buyer intent, risk signals and next steps to help teams manage complex deals and improve win rates.

[alignedup.com](https://alignedup.com)

## | DIGITAL SALES ROOM



Trumpet

Trumpet provides a modern digital sales-room platform with auto-personalised, collaborative, trackable spaces that cover the full buyer journey. Its opinionated, templated microsites, analytics and integrations act like a light AI-assisted deal room, helping reps stand out and keep deals moving.

[sendtrumpet.com](https://sendtrumpet.com)



Salesframe

Salesframe is a Nordic sales-enablement tool focused on field sales: it centralises presentations and sales packages, links activity back to CRM and uses analytics to reveal which content and meetings actually drive deals — giving teams a data-driven way to refine their story and save time.

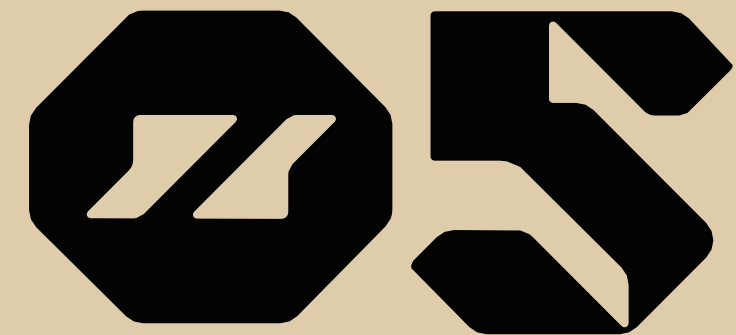
[salesframe.com](https://salesframe.com)

### In a nutshell

In an increasingly complex and competitive marketplace, where buyers expect a greater amount of involvement and personalization, salespeople need tools to ease the sales process and remove any potential points of friction. AI amplifies their ability to deliver this personalization at scale—generating customized content, surfacing relevant insights, and identifying friction points before they derail deals.

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 room platforms we've listed do just that—removing friction and enabling your sales team to make more sales. With AI-powered features, these platforms now proactively guide both sellers and buyers through the process, making complex deals feel simpler and more collaborative.





# Marketing Automation





## | MARKETING AUTOMATION

B2B marketing automation tools are revolutionizing how businesses attract, nurture, and convert leads. These platforms enable seamless, multi-channel campaigns by automating workflows across email, social media, and paid ads, ensuring consistent messaging and engagement at scale.

### **AI transforming campaign intelligence**

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

Modern marketing automation platforms use generative AI to create email copy, subject lines, social media posts, and ad variations automatically—testing and optimizing across audiences without manual intervention. AI analyzes which content resonates with specific segments and automatically adjusts campaign elements to maximize performance. Some platforms now use AI to predict which leads are most likely to convert and automatically prioritize them for high-touch outreach.

### **Intelligent workflow automation**

Automation streamlines repetitive tasks like lead scoring, segmentation, and follow-ups, freeing marketers to focus on strategy and creativity. AI enhances this by making lead scoring dynamic—continuously updating scores based on behavioral signals, engagement patterns, and lookalike modeling from closed deals. Machine learning identifies the optimal times to send messages, the best channels for each contact, and when leads are showing buying intent.

Enhanced integration with CRM systems provides a unified view of customer journeys, helping teams deliver a cohesive and data-driven marketing experience.

## | MARKETING AUTOMATION



Adobe Marketo Engage

A robust marketing automation platform now infused with generative-AI: AI assistants accelerate email and landing-page creation, optimize send times, summarize chats/webinars, and power cross-channel personalization—helping teams scale ABM and revenue impact.

**[business.adobe.com/products/marketo.html#](https://business.adobe.com/products/marketo.html#)**



Agentforce Marketing by Salesforce

Agentforce Marketing combines Salesforce's AI and automation to power intelligent B2B growth. It uses Einstein to score leads, personalize journeys, and optimize campaign timing and helping marketing and sales teams launch smarter programs, align on pipeline, and forecast impact with precision.

**[salesforce.com/marketing](https://salesforce.com/marketing)**



Intuit Mailchimp

A leading automation platform with AI tools for content generation, predictive/behavioral segmentation, and send-time optimization—enabling multichannel campaigns that deliver personalized messaging at scale and measurable growth.

**[mailchimp.com](https://mailchimp.com)**



HubSpot Marketing Hub

An all-in-one platform that adds Breeze AI agents/assistant for content creation, journey orchestration, and automation—helping teams identify high-intent leads and run cross-channel programs with less manual work.

**<https://www.hubspot.com/products/marketing>**

## MARKETING AUTOMATION

# APSIS

an **efficy** company • 

Apsis

Apsis automates customer journeys and now includes an AI Assistant specialized in email: generate, rephrase, shorten, and personalize content; test variants; and turn engagement data into next-best actions.

[apsis.com](https://apsis.com)

# ORACLE

Oracle Marketing

Oracle Marketing is an AI-powered, complete marketing suite that enables marketers to unify customer data from all sources and activate personalized, multichannel campaigns through an easy-to-use interface.

[oracle.com/cx/marketing/](https://oracle.com/cx/marketing/)

The logo for act-on features three overlapping circles in blue, yellow, and red to the left of the text "act-on" in a bold, dark blue sans-serif font.

Act-On

Act-On's adaptive platform adds AI Predictive Lead Score and gen-AI content—using ML to rank conversion likelihood and automate targeting so messages reach the right people at the right time.

[act-on.com](https://act-on.com)

ActiveCampaign >

ActiveCampaign

Customer experience automation with AI for predictive send-time, behavioral analysis, and generative content—building journeys that personalize at scale and improve campaign performance.

[activecampaign.com](https://activecampaign.com)

## | MARKETING AUTOMATION



Constant Contact

A unified platform for email, websites, stores, and social—now with AI marketing tools that create copy and posts, automate follow-ups, and provide analytics to speed execution for small teams.

**[constantcontact.com](https://constantcontact.com)**

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Keap

SMB-focused CRM + marketing automation enhanced with AI: assisted email writing, workflow recommendations, and predictive follow-ups streamline lead capture, pipeline tracking, and relationship nurturing.

**[keap.com](https://keap.com)**

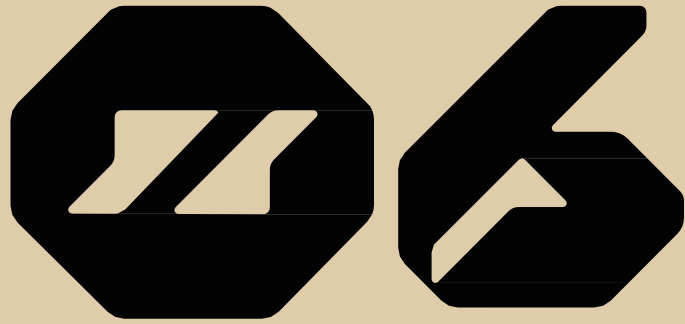
### In a nutshell

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.

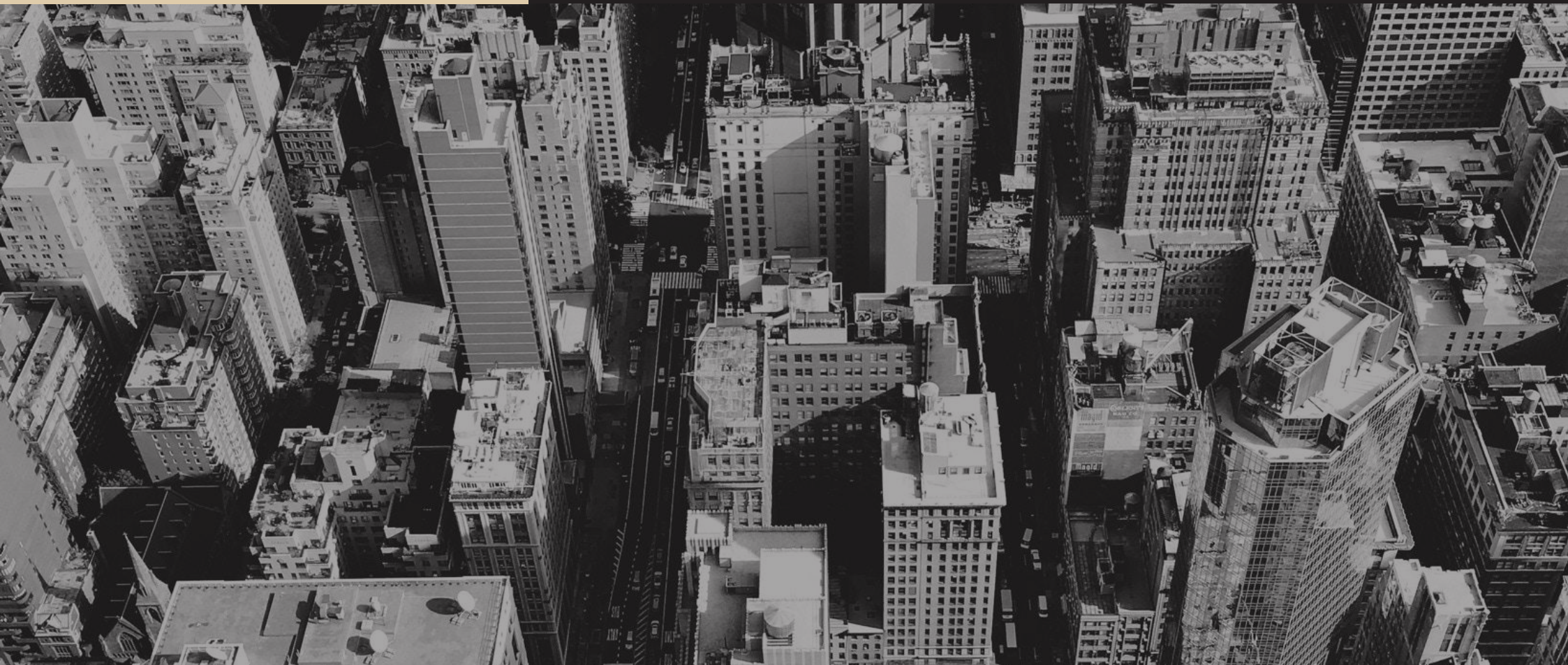
AI has transformed these platforms from workflow engines into intelligent marketing orchestrators. AI-driven insights, deeper personalization through generative content, and seamless CRM integration now provide a unified customer view. Marketing automation is also becoming more industry-specific, with AI models trained on vertical-specific data offering tailored solutions for niche markets.

Ultimately, the convergence of behavioral data (automation), customer insights (CRM), and external signals (sales intelligence)—all enhanced by AI—is crucial for delivering targeted, high-impact campaigns in modern B2B marketing.





# Account-Based Sales & Marketing



## | ACCOUNT-BASED SALES & MARKETING

Account-based sales and marketing tools are reshaping how businesses 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.

### **AI-powered account intelligence**

AI has elevated account-based strategies from targeted outreach to predictive orchestration. Modern platforms use machine learning to analyze thousands of signals—from technographic data and organizational changes to web behavior and content engagement—to identify which accounts are actually in-market and ready to buy.

AI automatically builds ideal customer profiles by analyzing your best customers and finding lookalike accounts that exhibit similar characteristics and behaviors. Generative AI now creates account-specific content at scale, from personalized landing pages and email sequences to customized one-pagers and executive briefings. Rather than generic messaging with a company name inserted, AI generates truly unique narratives based on each account's industry challenges, recent news, competitive landscape, and strategic initiatives.

### **Seamless data integration and collaboration**

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. AI synthesizes these disparate data sources, automatically surfacing the most relevant insights and recommending next best actions for each stakeholder within an account. This integration streamlines collaboration between sales and marketing teams, aligning efforts and ensuring consistency across touchpoints. AI helps orchestrate multi-threaded engagement strategies, tracking which team members should connect with which stakeholders and suggesting optimal sequences for account penetration.

## | ACCOUNT-BASED SALES & MARKETING



6sense

6sense's Revenue AI platform captures massive intent and account signals (its "Signalverse") to predict in-market buyers, prioritize buying teams, and automate coordinated plays—helping teams create more opportunities earlier and win more often.

[6sense.com](https://6sense.com)



Madison Logic

Madison Logic's ABM platform applies AI-powered buyer-intent data and "ML Insights" to surface influencers across the journey, refine ICP-based segments, and guide cross-channel activation so revenue teams convert best-fit accounts faster.

[madisonlogic.com](https://madisonlogic.com)



Demandbase

A pioneer in ABM, Demandbase now bills itself as a pipeline AI platform: unified modules for advertising, marketing, sales, and analytics use AI to predict next opportunities, score ICP fit, and trigger agent-led automations for targeted engagement.

[demandbase.com](https://demandbase.com)



Metadata

Metadata uses agentic AI to launch, optimize, and analyze paid campaigns across channels; its MetadataONE connects directly to LLMs so teams can plan, build, and deploy programs from their AI workspace while the agents run the ads.

[metadata.io](https://metadata.io)



## | ACCOUNT-BASED SALES & MARKETING



RB2B

RB2B identifies anonymous visitors at the person level, enriches them with names, roles, LinkedIn profiles and emails, and pushes real-time Slack alerts—turning website intent into immediate, hyper-personalized ABM outreach.

[rb2b.com](https://rb2b.com)



Fibbler

Fibbler turns LinkedIn ad and content engagement into actionable intent signals by mapping company-level viewers to your CRM, attributing influenced pipeline/revenue, and alerting sales when to act.

[fibbler.co](https://fibbler.co)



Keyplay

Keyplay helps teams build transparent, inspectable ICP models with AI agents and white-box fit + intent scoring, so GTM can find, score, and track best-fit accounts and replicate success.

[keyplay.io](https://keyplay.io)



Factors.ai

Factors.ai blends ABM and marketing analytics with AI to detect account-level intent, run and optimize campaigns (e.g., LinkedIn/Google), and tie engagement to revenue outcomes with automated insights.

[factors.ai](https://factors.ai)



## | ACCOUNT-BASED SALES & MARKETING



RollWorks

RollWorks connects account insights with multi-channel activation and real-time AI-powered guidance (e.g., AdRoll AI Assistant, BidIQ and AI Ad Builder) to identify high-fit accounts, personalize at scale, and measure pipeline impact.

[rollworks.com](https://rollworks.com)



N.Rich

N.Rich positions itself as an AI ABM copilot: AI agents and a B2B DSP power intent-led targeting, cross-channel programmatic ads, and European-grade compliance to activate high-intent buyers and feed hot accounts to sales.

[nrich.io](https://nrich.io)

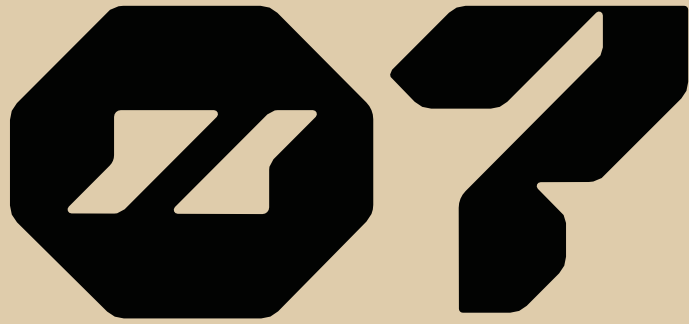
### In a nutshell

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.

AI is making these platforms exponentially more powerful—automatically identifying in-market accounts, generating personalized content at scale, and orchestrating complex multi-stakeholder engagement strategies. We're seeing solutions that are both holistic and industry-specific, with AI delivering deeper predictive insights, stronger collaboration through intelligent recommendations, and measurable growth for account-focused strategies.







# 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.

### **Unified data intelligence**

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

AI takes this integration to the next level by automatically detecting data quality issues, flagging inconsistencies, and enriching records with missing information. Machine learning models analyze data across all systems to surface hidden patterns—such as which marketing channels contribute to the highest lifetime value customers or which sales activities actually correlate with closed deals.

### **Intelligent automation and optimization**

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.

AI-powered automation now goes beyond rule-based workflows. Platforms use machine learning to dynamically route leads based on predicted conversion likelihood, automatically adjust territory assignments based on performance patterns, and proactively flag deals at risk before they slip. Generative AI creates forecast narratives, executive summaries, and performance reports that explain not just what happened, but why it happened and what to do about it.



## | REVENUE OPERATIONS PLATFORMS



Aviso

An AI revenue command center combining predictive forecasting, deal and pipeline guidance, and conversational intelligence—using multi-model machine learning to surface risks, recommend next actions, and improve forecast accuracy while cutting CRM busywork.

[aviso.com](https://aviso.com)



Clari

An AI-driven Revenue Orchestration Platform that captures every revenue signal, adds “Revenue Context,” and guides execution with RevAI and revenue AI agents—so teams spot risk, align on one truth, and run a predictable business.

[clari.com](https://clari.com)



Creatio

A no-code, agentic CRM and workflow platform with native AI: design and deploy autonomous agents, use natural-language automation, and unify predictive + generative + agentic capabilities to orchestrate sales, marketing, and service.

[creatio.com](https://creatio.com)



Revenue Intelligence by Salesforce

A unified AI-driven sales intelligence platform built into Sales Cloud. Revenue Intelligence transforms your sales data into actionable insights, empowers reps with next-best actions, and enables leaders to spot risks and opportunities in the pipeline and improve forecast accuracy across every deal stage.

<https://www.salesforce.com/sales/revenue-intelligence/>

## REVENUE OPERATIONS PLATFORMS



InsightSquared

Revenue intelligence with AI-powered analytics, activity capture, and conversational intelligence—giving RevOps real-time KPI visibility, stronger forecasts, and pipeline health tracking in one unified reporting layer.

[insightsquared.com](https://www.insightsquared.com)



Revenue Grid

Guided revenue operations with AI Sales Assistants and a Sales Intelligence Engine: generative “signals” trigger next best actions, automate CRM hygiene, summarize meetings, and deliver pipeline insights in real time.

[revenuegrid.com](https://revenuegrid.com)



HubSpot Operations Hub

Operations software that cleans and syncs data across the stack and now uses Breeze AI and AI dedupe to auto-merge duplicates, monitor quality, and power automation—aligning sales, marketing, and service on a single source of truth.

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



Dear Lucy

Sales performance dashboards and forecasting embedded in Salesforce, HubSpot, Pipedrive, and Dynamics—now with AI-powered tiles and predictive analytics to track goals, pipeline coverage, and automated forecasts.

[dearlucy.co](https://dearlucy.co)

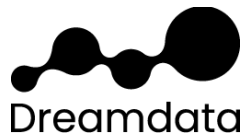
## | REVENUE OPERATIONS PLATFORMS



BoostUp

A RevOps & revenue intelligence platform featuring AI agents (Terret), machine-learning forecasts, conversation intelligence, and risk scoring—tripling rep productivity and calling the number early with predictive accuracy.

**[boostup.ai](https://boostup.ai)**



Dreamdata

B2B activation and attribution with AI-driven models and Signals: reveal buying intent from GTM data, attribute revenue across journeys, and sync high-intent audiences back to ads for faster pipeline generation.

**[dreamdata.io](https://dreamdata.io)**



Fullcast

An AI-enabled RevOps platform from plan to pay—territories, quotas, routing, and commissions—now accelerated by a RevOps copilot and Copy.ai generative automation to plan and execute GTM with precision.

**[fullcast.com](https://fullcast.com)**



Gong.io

A Revenue AI OS with agents that automate workflows, analyze conversations, and turn “Revenue Graph” data into guided actions—boosting seller productivity, forecast predictability, and growth across the customer lifecycle.

**[gong.io](https://gong.io)**

## | REVENUE OPERATIONS PLATFORMS



Revenue.io

An AI-powered revenue platform with Conversation AI, real-time coaching, and AI deal assistants—auto-summarizing calls, scoring conversations, routing calls, and flagging risks to drive consistent execution.

[revenue.io](https://revenue.io)



HockeyStack

An AI GTM/revenue data platform with agents (Odin, Nova) that analyze dashboards, unify GTM data, surface next best actions, and generate AI insights—bridging PLG and sales-led motions for clearer revenue attribution.

[hockeystack.com](https://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.

AI has transformed RevOps from operational coordination into predictive revenue intelligence. With deeper integrations and advanced predictive analytics, AI empowers teams to collaborate effectively and make data-driven decisions that drive sustainable growth. The platforms that leverage AI most effectively—for forecasting, automation, and prescriptive recommendations—are becoming indispensable for modern revenue teams.





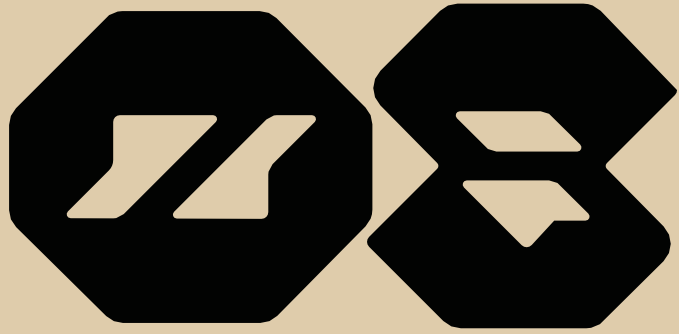
Mr  
Current Name  
Street Name 1  
12345 City Name

Street Name 1  
12345 City Name  
Tel: 000 000000  
E-Mail: email@domain.com

## Invoice

Dear Mr Current Name  
I authorize myself to make following invoice:

| Num.                 | Qty | Units | Article No | Goods/Service   | Unit Price | Price    |
|----------------------|-----|-------|------------|---|------------|----------|
| 1                    | 1   | pcs   |            | Food photography for summer menu. Menu design and printing on glossy cardstock (A4, 150gsm) (50 pieces) | 275.11 €   | 275.11 € |
| 1                    | 33  | pcs   |            | Single product photo on white background  | 3.34 €     | 110.22 € |
| 1                    | 1   | pcs   |            | Photo License for Certificate   | 16.66 €    | 16.66 €  |
| Total                |     |       |            |   |            | 402.00 € |
| VAT 19%              |     |       |            |   |            | 76.38 €  |
| Total Amount Payable |     |       |            |   |            | 478.38 € |



# 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.

Modern customer success solutions leverage AI to provide businesses with sophisticated customer health scoring, predictive churn analysis, and automated intervention triggers. Machine learning algorithms now analyze behavioral patterns, usage data, and engagement signals to identify at-risk customers before issues escalate and surface expansion opportunities within healthy accounts.

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 critical for revenue preservation, expansion, and sustainable growth in an increasingly competitive B2B landscape

## | CUSTOMER SUCCESS



Planhat

Planhat's unified customer platform now includes an AI layer with agents, conversational AI and an AI Model Hub, pulling from CRM, tickets, product usage and call transcripts to auto-summarize, enrich, detect sentiment and trigger no-code automations.

[planhat.com](https://planhat.com)



Custify

Custify centralizes customer data and automates playbooks; with AI-guided best practices and automation, CS teams reduce churn, optimize onboarding and scale expansion with fewer manual steps.

[custify.com](https://custify.com)



ChurnZero

ChurnZero embeds Customer Success AI with purpose-built agents for health/risk detection, Snapshot AI account summaries and Engagement AI for sentiment/topic analysis—automating personalized plays and renewal forecasting at scale.

[churnzero.com](https://churnzero.com)



Gainsight

Gainsight adds AI agents for retention and growth, Staircase AI customer intelligence and AI-powered CS features (scorecard optimization, churn prediction) to turn disparate data into guided actions that drive measurable outcomes.

[gainsight.com](https://gainsight.com)



## | CUSTOMER SUCCESS



ZapScale

ZapScale is an AI-powered CS platform that unifies signals, scores health and automates engagement; its AI content and journey tools help teams personalize outreach and act on risks/expansion opportunities in real time.

[zapscale.com](https://zapscale.com)



Churn360

Churn360 focuses on churn reduction with advanced analytics and ML to identify at-risk customers and drivers of churn, pairing retention workflows with AI-augmented operations.

[churn360.com](https://churn360.com)



Vitally

Vitally

Vitally introduces an AI Copilot that analyzes unstructured data (notes, transcripts, conversations) to generate summaries, tasks and follow-ups, surface risks/opportunities and eliminate CS busywork across the customer journey.

[vitally.io](https://vitally.io)



ClientSuccess

ClientSuccess adds SmartCS™ automation and AI (e.g., Weekly Pulse summaries, Email Assist, AI insights) to deliver prescriptive recommendations, personalized communications and intelligent actions across the lifecycle.

[clientsuccess.com](https://clientsuccess.com)

## | CUSTOMER SUCCESS



Totango

Totango's platform now includes Unison—an AI-powered churn intelligence engine—and a Jasper-based content generator, unifying signals to predict risk, automate insights and help teams protect and grow revenue.

**[totango.com](https://totango.com)**

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Freshworks Customer Service

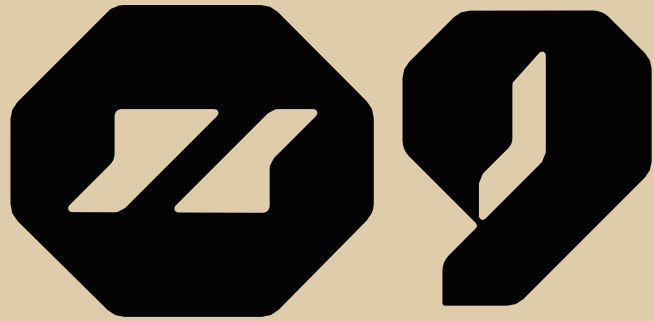
Freshworks brings its agentic “Freddy AI” approach into customer success and support: virtual agents + human agents resolve issues, auto-summarize and recommend actions while workflows monitor health scores and drive proactive engagement.

**[freshworks.com](https://freshworks.com)**

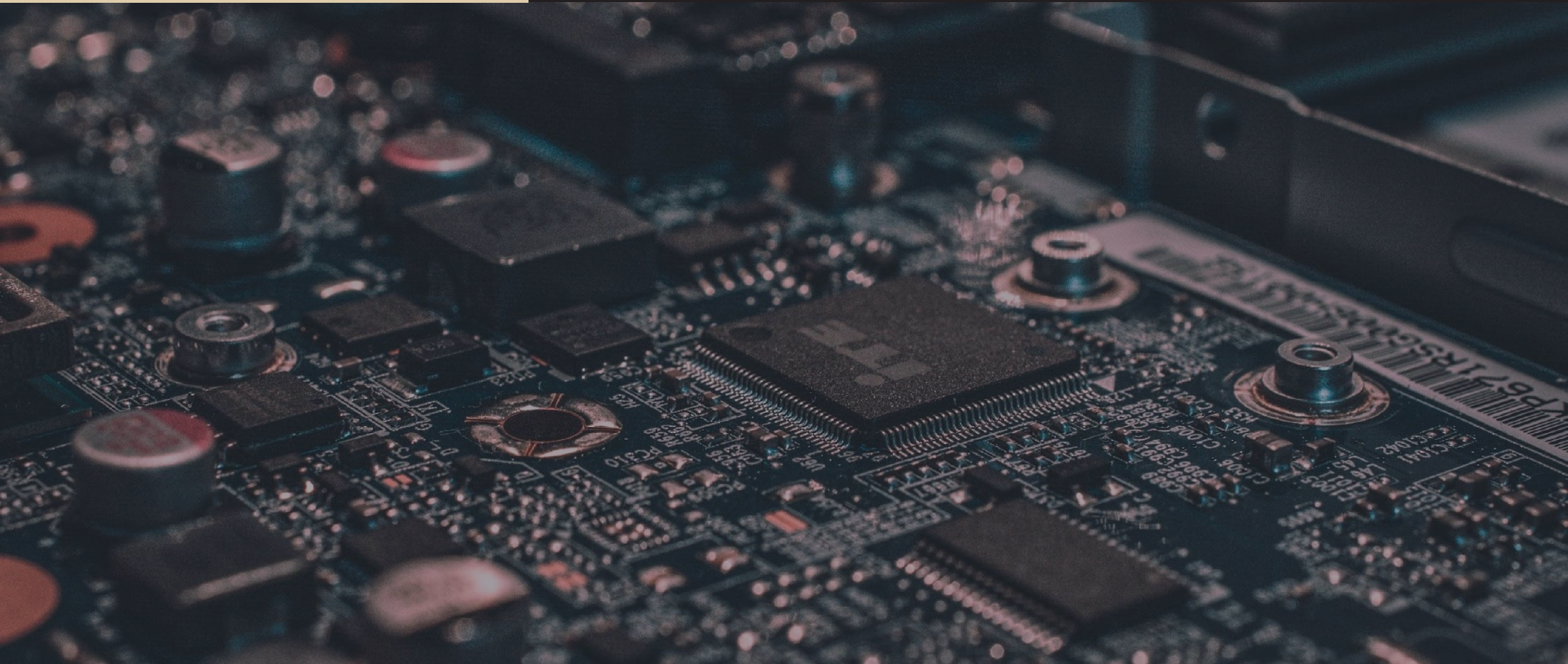
## In a nutshell

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

In 2026, the average B2B organization uses dozens of specialized tools across sales, marketing, and customer success. While this tech stack diversity drives innovation, it creates a critical challenge: data silos that prevent teams from getting a complete view of their customers and operations.

Data connectors and integration platforms solve this problem by enabling seamless data flow between your systems. As AI becomes central to business operations, the ability to connect and unify data across platforms isn't just convenient anymore. It's essential for powering the intelligent automation and insights that modern teams depend on.

### **Data connectors**

Move information between different systems, making your data accessible wherever you need it. Whether you're syncing CRM data to your marketing automation platform or feeding customer interactions into your analytics tools, connectors ensure your systems stay in sync in real time.

### **Data integration platforms**

Go a step further by combining data from multiple sources into a unified system, creating a single source of truth. This becomes particularly powerful when feeding AI models that need comprehensive data to generate accurate predictions and recommendations.

In the AI era, these tools have evolved beyond simple data pipelines. Modern integration platforms now offer intelligent data mapping, automated workflow triggers, and built-in data quality monitoring. They're the invisible infrastructure that makes your entire tech stack work together as a cohesive system.

We've compiled a comprehensive list of data connector and integration solutions to help you break down silos, accelerate data workflows, and unlock the full potential of your technology investments



## DATA CONNECTORS AND INTEGRATIONS



Supermetrics

Supermetrics is a data integration platform now augmented with Supermetrics AI to centralize and enrich sales/marketing data, add AI-assisted fields, and ground insights in trusted pipelines to Sheets, Excel, and warehouses—speeding reporting and analysis.

[supermetrics.com](https://supermetrics.com)



Zapier

Zapier is a no-code automation platform that now serves as an AI orchestration layer—offering Copilot, AI Agents, chatbots, and AI steps in Zaps—so sales teams can connect tools, eliminate manual tasks, and run autonomous, data-aware workflows.

[zapier.com](https://zapier.com)



Airbyte

Airbyte is an open-source data integration platform that centralizes customer data with 600+ connectors and an AI-assisted Connector Builder; it also delivers low-latency “context” to AI agents, enabling flexible, scalable syncing for B2B sales workflows.

[airbyte.com](https://airbyte.com)



Fivetran

Fivetran is a fully automated data integration platform that feeds analytics and AI use cases with reliable pipelines—bringing unstructured data into AI-ready form and powering RAG and model workflows with governed, always-fresh data in warehouses.

[fivetran.com](https://fivetran.com)

## | DATA CONNECTORS AND INTEGRATIONS



n8n

n8n is a workflow automation platform that combines AI nodes with BPA, offering thousands of AI workflow templates and agent-style automations so technical teams can design complex, data-aware processes quickly.

[n8n.io](https://n8n.io)

### ANTHROPIC

MCP Server (Model Context Protocol)

An MCP server is a standardized connector that links AI assistants to tools, data, and actions through a secure JSON-RPC interface. Often described as USB C for AI, it lets agents query databases, files, or SaaS systems and return structured results for grounded reasoning and automation. Developed collaboratively by Anthropic and other ecosystem contributors, MCP enables one server to power multiple assistants and workflows.

[anthropic.com](https://anthropic.com)

### Gumloop

Gumloop

Gumloop is an AI automation framework with drag-and-drop builders for agents, data, and apps—providing prebuilt sales/marketing agents and documentation for tool-using AI that adapts to open-ended tasks across go-to-market workflows.

[gumloop.com](https://gumloop.com)

### make

Make.com

Make is a visual automation platform that connects apps, data, and workflows across the business. It allows teams to build integrations with clicks, automate repetitive tasks, and synchronize information between systems. By turning manual processes into connected workflows, Make helps organizations move faster, reduce errors, and focus on higher-value work.

[make.com](https://make.com)

## | DATA CONNECTORS AND INTEGRATIONS



Workato

Workato is an enterprise automation platform with AI@Work: Copilots, AI by Workato actions, and agentic “Genies” to build/manage AI agents that reason, take actions across apps, and orchestrate revenue processes end-to-end.

[workato.com](https://workato.com)

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Tray.io

Tray.io is an integration and automation platform featuring Merlin—an agent builder and native AI functions—to transform LLM outputs into actions, manage agents across connected systems, and deploy them in Slack, web apps, or APIs.

[tray.io](https://tray.io)

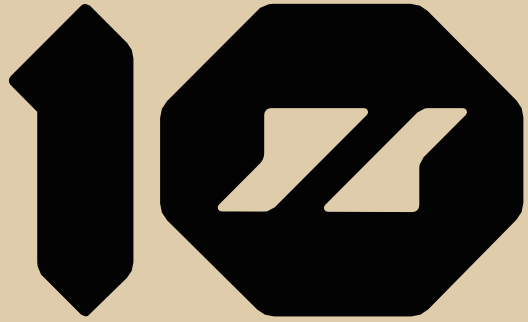
### In a nutshell

Even when organizations have all the data and tools they need, they often face a familiar challenge: information spread across countless systems, apps, and platforms. This fragmentation makes real-time access difficult and limits the value of the data itself. A new generation of integration technologies is changing that. Platforms like MCP Server, n8n, Gumloop, and Make.com are reshaping how data and tools connect in the era of AI agents. Instead of building costly, one-off integrations, businesses can now use standardized connectors and visual workflows to link CRMs, databases, and SaaS tools into unified, intelligent systems.

These modern data connectors act as the connective tissue for AI-driven organizations, allowing agents and automation layers to retrieve, update, and reason over information seamlessly. For teams that want flexibility without complexity, they offer a faster, scalable way to bring every system and dataset into the same conversation.







# 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.

## | CPQ AND QUOTE MANAGEMENT SOFTWARE



DealHub

DealHub CPQ adds DealHub AI—unified agents, assistants, and analyzers that surface real-time quoting insights, guide buyers in DealRooms, and auto-answer complex pricing queries—so teams speed quote-to-cash and boost deal velocity.

[dealhub.io](https://dealhub.io)



PandaDoc

PandaDoc accelerates cycles with CPQ plus Contract AI—using generative and assistive AI to create, review, and track contracts and quotes, reducing admin and improving the customer experience.

[pandadoc.com](https://pandadoc.com)



Proposify

Proposify streamlines closing with AI proposal creation: its generator drafts branded proposals in minutes, then tracks engagement so reps refine and sign off faster from design to signature.

[proposify.com](https://proposify.com)



Vloxq

Vloxq's CPQ eliminates manual work and highlights AI's role in next-gen quoting—using automation and AI-guided pricing logic to simplify proposal creation and shorten sales cycles.

[vloxq.com](https://vloxq.com)

## | CPQ AND QUOTE MANAGEMENT SOFTWARE



### Conga CPQ

Conga unifies CPQ with Contract AI to extract clauses, auto-check compliance, and copilot document edits—improving accuracy, governance, and time-to-quote within CRM workflows.

**[conga.com/products/conga-cpq](https://conga.com/products/conga-cpq)**



### Salesforce CPQ

Salesforce CPQ ties into Einstein—generating emails and summaries, guiding sellers with predictions, and automating approvals—so quoting through revenue recognition runs on trusted AI.

**[salesforce.com/sales/cpq/](https://salesforce.com/sales/cpq/)**



### Subscribe

Subscribe combines CPQ, subscription billing, and RevRec with DealDesk AI to speed complex SaaS quotes, streamline approvals, and handle usage/mid-term changes with minimal ops overhead.

**[subscribe.com](https://subscribe.com)**



### HeadQ

HeadQ is a Visual CPQ for manufacturers that turns websites into self-serve sales channels; its visual configurator calculates prices and collects quote requests, enabling digital commerce for complex products.

**[headq.io](https://headq.io)**



## | CPQ AND QUOTE MANAGEMENT SOFTWARE



Qwilr

Qwilr uses AI to generate interactive, CRM-prefilled proposals and pages, then tracks buyer engagement—helping teams personalize quickly and deliver world-class buyer experiences.

[qwilr.com](https://qwilr.com)



HubSpot CPQ

HubSpot's AI-powered CPQ (in Commerce Hub) auto-drafts personalized quotes from deal context, streamlines approvals, and ties quoting to billing and payments—all inside Smart CRM.v

[hubspot.com/products/sales/cpq](https://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.



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# Conversation Intelligence



## | CONVERSATION INTELLIGENCE

Conversation intelligence has become essential infrastructure for high-performing sales and customer success teams in 2026. These AI-powered platforms automatically record, transcribe, and analyze every customer interaction, transforming conversations into actionable intelligence that drives revenue and improves team performance.

Modern conversation intelligence goes far beyond basic call recording. Advanced natural language processing and machine learning algorithms analyze the nuances of customer conversations in real time, detecting sentiment shifts, identifying buying signals, flagging competitive mentions, and surfacing critical pain points that sales reps might miss in the moment.

### **Real-time intelligence**

AI analyzes conversations as they happen, providing live coaching cues, suggested responses, and next-best-action recommendations directly to reps during calls. This real-time guidance helps teams navigate objections, emphasize key value propositions, and capitalize on buying signals immediately.

### **Performance optimization**

These platforms automatically score calls based on successful behavior patterns, track talk-to-listen ratios, measure question quality, and identify which messaging resonates most with prospects. Sales leaders gain unprecedented visibility into what's working and where coaching is needed.

### **Scalable coaching**

Instead of manually reviewing calls, managers receive AI-generated highlights of coachable moments, winning techniques, and areas for improvement across their entire team. This data-driven approach makes it possible to scale best practices across global sales organizations.

### **Seamless data capture**

Conversation intelligence platforms integrate directly with CRM systems, automatically logging call summaries, extracting action items, and updating deal records. This eliminates manual data entry while ensuring that critical conversation context is never lost.



## | CONVERSATION INTELLIGENCE



Chorus by ZoomInfo

Chorus captures, transcribes, and analyzes sales calls and meetings with AI, surfacing sentiment, topics, and moments that matter so teams coach better and act faster across deals and accounts.

[zoominfo.com/products/chorus](https://zoominfo.com/products/chorus)



Clari Co-Pilot

Copilot delivers AI-powered conversation intelligence—recording and analyzing calls, flagging risks, and explaining why deals progress or slip—so sellers get real-time guidance and revenue leaders orchestrate tighter, faster sales motions.

[clari.com/products/copilot/](https://clari.com/products/copilot/)



Garba

Garba uses AI agents to mine sales calls for hidden value—auto-drafting follow-ups, enriching CRM records, detecting churn risks, and pushing timely insights so revenue teams act on conversations immediately.

[garba.ai](https://garba.ai)



Gong.io

Gong's Revenue AI OS analyzes phone, email, and meeting interactions with 300+ signals; agents and smart trackers surface deal risks, forecast outcomes, and turn conversations into guided actions that improve predictability and growth.

[gong.io](https://gong.io)

## | CONVERSATION INTELLIGENCE



Fireflies.ai

Fireflies' AI teammate joins meetings to record, transcribe, and generate smart summaries; searchable transcripts, analytics, and "AskFred" Q&A turn conversations into actionable follow-ups and team-wide knowledge.

[fireflies.ai](https://fireflies.ai)



Salesloft

Salesloft Conversations captures and analyzes customer interactions with AI—sentiment, keywords, and compliance—feeding coaching insights and pipeline signals; paired with its AI assistant, reps prep faster and execute with consistency.

[salesloft.com](https://salesloft.com)



Outreach (powered by Kaia™)

Outreach's KAIA provides real-time conversation intelligence—live transcription, battlecards, next-best actions, and post-call summaries—reducing manual work and improving coaching while linking insights to pipeline and forecasting.

[outreach.io](https://outreach.io)



Jiminny

Jiminny's conversation intelligence records and analyzes calls, emails, and videos with AI to reveal winning behaviors, highlight coaching moments, and convert conversation data into clear actions that lift team performance.

[jiminny.co](https://jiminny.com)  
[m](https://jiminny.com)

## | CONVERSATION INTELLIGENCE



Fathom

Fathom is an AI notetaker that delivers accurate transcripts, instant call summaries, action items, and “Ask Fathom” search—syncing notes and insights to tools like Salesforce and HubSpot to speed tailored follow-ups.

**[fathom.video](#)**

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Otter.ai

Otter’s AI meeting agent provides live transcription, smart summaries, automated follow-up emails, CRM syncing, and deal intelligence—turning conversations into shareable insights that improve 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.





# e-Signature and Document Tracking





## | E-SIGNATURE AND DOCUMENT TRACKING

E-signature technology has transformed from a nice-to-have convenience into a mission-critical sales tool. In 2026, paperless workflows are the standard, and modern e-signature platforms have evolved into intelligent document management systems that accelerate deal velocity and provide real-time insights into buyer engagement.

At its core, e-signature software enables secure digital signing of contracts, proposals, and agreements. But today's platforms offer far more than a digital pen. They've become sophisticated sales enablement tools that help teams close deals faster, track document engagement, and automate contract workflows from creation to renewal.

### **Real-time engagement tracking**

Modern platforms provide instant notifications when prospects open, view, or share documents. Sales teams can see exactly which pages prospects spend time on, how many times they've reviewed the document, and when they forward it to other decision-makers. This intelligence allows reps to follow up at precisely the right moment with relevant context.

### **AI-powered workflow automation**

Advanced solutions now automate the entire contract lifecycle, from generating documents using AI-driven templates to routing approvals through the right stakeholders and sending automatic renewal reminders. Machine learning can even suggest optimal contract terms based on historical data and deal characteristics.

### **Enhanced security and compliance**

As regulations around digital agreements have matured, e-signature platforms now offer enterprise-grade security, audit trails, and compliance certifications that meet global standards.

Beyond contracts, sales teams use these platforms to send tracked proposals, marketing collateral, and sales documents, gaining valuable insights into what content resonates with prospects. The vendors below represent the leading solutions for modern, paperless sales organizations.

## | E-SIGNATURE AND DOCUMENT TRACKING



### Adobe Sign

Adobe Sign

Adobe Sign adds AI helpers like the Acrobat/Sign Smart Assistant for natural-language guidance, plus advanced, compliant e-signature flows—so users send, sign, track and manage agreements with intelligent, in-app assistance across web and mobile.

[adobe.com/sign/](https://adobe.com/sign/)



### Contractbook

Contractbook

Contractbook layers AI across the contract lifecycle—OCR and data extraction, searchable metadata, deadline reminders and compliance automation—so teams create, sign and store agreements while unlocking insights and hands-free workflows.

[contractbook.com](https://contractbook.com)

## DocuSign®

DocuSign

DocuSign's Iris Agreement AI powers AI-assisted data extraction, review, obligation management and contract agents—bringing intelligence to drafting, negotiation and post-signature tracking alongside its enterprise eSignature integrations.

[docusign.com](https://docusign.com)



### visma sign

Visma Sign

Visma Sign digitises the whole signature chain with web forms, archives and eID-backed signing; AI-based product support (Vispertti/Vispert) assists users, while broad integrations simplify contract operations for Nordic businesses.

[vismasign.com](https://vismasign.com)

## | E-SIGNATURE AND DOCUMENT TRACKING



Oneflow

Oneflow AI generates, reviews and analyzes contracts at scale—surfacing risks, extracting key terms and providing portfolio-level insights—so teams cut routine work and act on data-driven recommendations.

[oneflow.com](https://oneflow.com)



PandaDoc

PandaDoc infuses Contract AI into CPQ + e-sign—using generative tools to draft, review and track agreements and proposals—reducing admin while improving speed and CX.

[pandadoc.com](https://pandadoc.com)



Penneo

Penneo streamlines digital signing with automated signing flows, strong eID-based identity verification and eIDAS/ESIGN-aligned trust—delivering secure, compliant signatures across markets.

[penneo.com](https://penneo.com)



SignNow

SignNow (airSlate) introduces AI-enhanced signing and signature analysis, pairing automated workflows and API integrations with AI checks to strengthen security and end-to-end document operations.

[signnow.com](https://signnow.com)

## | E-SIGNATURE AND DOCUMENT TRACKING

### Scrive.

Scrive

Scrive's Nordic e-sign platform automates agreement workflows, ID verification and compliance; its integrations and modules support AI-agent-driven onboarding/verification to accelerate secure, audit-ready processes.

[scrive.com](https://scrive.com)

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Dropbox Sign

Dropbox Sign streamlines prepare-send-sign-track with deep Dropbox/Workspace integrations; API and automation features power embedded signing and template flows that reduce manual steps across teams.

[sign.dropbox.com](https://sign.dropbox.com)

### In a nutshell

E-signature platforms in 2026 have evolved into comprehensive document intelligence systems. Beyond capturing signatures, they now offer AI-powered engagement tracking, automated workflow orchestration, and predictive analytics that help sales teams understand buyer intent and close deals faster. Real-time collaboration features, including in-document chat and multi-stakeholder coordination, ensure the entire signing process happens seamlessly within a single platform.

As data privacy regulations continue to evolve globally, leading vendors have built robust compliance frameworks that balance engagement insights with privacy requirements, allowing sales teams to track document interactions while respecting regional data protection laws like GDPR.



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# AI Agent Platforms





## | AI AGENT PLATFORMS

In 2026, AI agents will have become autonomous teammates for sales organizations. These intelligent systems independently execute complex sales tasks, make decisions, and drive revenue outcomes with minimal human intervention.

AI agents operate autonomously; prospecting for leads, conducting outreach, qualifying prospects, scheduling meetings, and handling initial discovery conversations. They do the work, freeing human sales professionals to focus on high-value relationships and strategic deals.

### **Autonomous execution**

Modern AI agents autonomously identify ideal prospects by analyzing thousands of data points, then execute personalized multi-channel outreach campaigns. They craft unique messages for each prospect, respond to replies, handle objections, and adapt based on engagement patterns.

These agents work 24/7, processing inquiries, qualifying leads through conversations, and booking meetings directly onto reps' calendars.

AI agents can handle the entire top-of-funnel process—from research through qualification—often outperforming traditional SDR teams in both volume and conversion rates.

### **Intelligent decision-making**

AI agents make sophisticated decisions in real time. They analyze prospect behavior, determine optimal follow-up timing, choose effective communication channels, and dynamically adjust messaging strategies. When prospects show buying signals, agents automatically escalate to human reps with comprehensive context and recommended next steps.

Advanced natural language processing enables nuanced conversations—understanding intent, detecting objections, and responding appropriately. They handle complex qualification workflows, gather needs information, and conduct initial product demonstrations.

## | AI AGENT PLATFORMS



### HubSpot Breeze Intelligence

HubSpot's AI assistant lives inside the Smart CRM and Sales Hub to draft emails, summarize interactions, prep meetings, and prioritize tasks using your CRM context—streamlining prospecting and follow-up.

**<https://www.hubspot.com/products/artificial-intelligence>**



### Salesforce Agentforce

An intelligent AI assistant embedded across Salesforce apps that answers questions, generates content, and automates actions; teams use it for real-time guidance, workflow execution, and better pipeline management.

**[salesforce.com/agentforce/](https://salesforce.com/agentforce/)**



### Sana

Sana provides an AI platform to build expert agents grounded in your company knowledge, connecting all data so agents can search, summarize meetings, generate content, analyze, and take actions across your tools.

**[sana.ai](https://sana.ai)**



### Artisan

Artisan offers AI “employees” for outbound, led by Ava—the AI BDR that finds and researches leads and runs cold email so reps can focus on closing; built on agent tech and expanding to inbound workflows.

**[artisan.com](https://artisan.com)**

## | AI AGENT PLATFORMS



### Vainu Agents

Vainu's AI agents (Research Agent, Enrichment Agent, Discovery Agents) combine Vainu's company data with LLMs to answer deep prospect questions, build scoring models, and enrich target groups. Discovery Agent is using an advanced vector search to scan leads from text-rich long documents.

[vainu.com](https://vainu.com)

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### 11x

11x ships autonomous “digital workers” like Alice (AI SDR) that continuously prospect, handle replies, and book meetings—24/7, multilingual, and improving with each interaction.

[11x.ai](https://11x.ai)



### UserGems

UserGems automates job-change tracking and alerts so past champions become warm pipeline, reducing SDR manual work and turning intent signals into timely outreach in your CRM.

[usergems.com](https://usergems.com)

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### Relevance AI

A visual platform to build and manage autonomous AI agents (no code) that act as teammates—handling follow-ups, call summaries, content retrieval, and multi-step sales processes across your stack.

[relevanceai.com](https://relevanceai.com)



## | AI AGENT PLATFORMS

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Common Room's GTM AI captures signals across product usage, web, social, and "dark funnel," then RoomieAI turns them into prioritized accounts, contextual summaries, and next-best actions for reps.

[commonroom.io](https://commonroom.io)

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Copilot for Microsoft Dynamics 365

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](https://microsoft.com/en-us/dynamics-365#solutions)

## In a nutshell

AI agent platforms are reshaping how sales teams operate, moving beyond simple automation to intelligent collaboration. These systems combine large language models with CRM and sales data to identify intent, suggest next actions, and provide real-time insights during customer interactions. The result is a new level of sales intelligence where agents act as co-pilots, helping professionals focus on strategy and relationships instead of manual work.

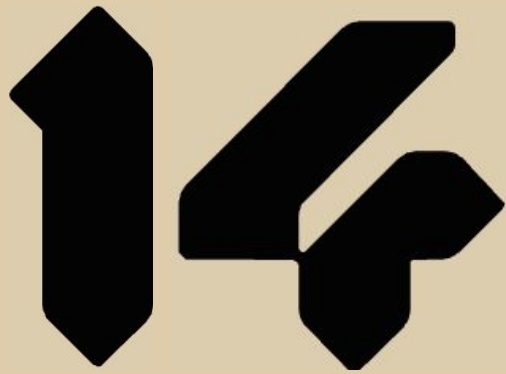
Modern sales workflows are increasingly powered by interconnected agents that automate data capture, enrich records, and orchestrate activities across tools.

Integrations and standardized connectors make it possible for these agents to reason across multiple systems, linking marketing, sales, and customer success data into one context-aware view. This creates a seamless flow of insights and actions across the entire revenue process.

The rise of "agentic" workflows marks a major evolution in B2B sales technology. Instead of static dashboards and siloed automation, businesses now use adaptable AI systems that learn, act, and collaborate in real time. This shift is redefining productivity and performance across sales organizations, setting a new standard for intelligence-driven growth.







# Compensation Management



## COMPENSATION MANAGEMENT

Compensation management platforms have become strategic revenue drivers, transforming how organizations design, execute, and optimize sales incentive programs. These AI-powered systems eliminate the complexity and errors that plague manual commission tracking, while providing the transparency and real-time insights that modern sales teams demand.

Traditional spreadsheet-based commission management is plagued by errors, disputes, and delays that damage trust and motivation. Modern compensation platforms solve these challenges through automated calculations that handle even the most complex commission structures with perfect accuracy, eliminating payment disputes and reducing administrative overhead.

### **Real-time visibility**

Sales reps can track their earnings, quota attainment, and commission status in real time through intuitive dashboards. This transparency keeps teams motivated and focused on the activities that drive their compensation, creating a direct line of sight between effort and reward.

### **AI-powered plan optimization**

Advanced platforms use machine learning to analyze which compensation structures drive the best outcomes. They can model different incentive scenarios, predict their impact on behavior and revenue, and recommend optimal commission plans that align sales activities with business objectives.

### **Seamless data integration**

These systems integrate directly with CRM platforms, billing systems, and revenue tools, automatically pulling in sales data to calculate commissions instantly. This eliminates manual data entry, reduces errors, and ensures payouts are always based on the most current information.

### **Strategic insights for leadership**

Compensation analytics reveal which plan components motivate desired behaviors, identify top performers, flag potential payout issues before they occur, and provide the data needed to continuously refine incentive strategies.



## | COMPENSATION MANAGEMENT



QuotaPath

QuotaPath adds an AI-Powered Plan Builder and guided modeling to automate commission rules, simulate earnings, and forecast outcomes—giving reps real-time visibility and RevOps fewer manual steps.

[quotapath.com](https://quotapath.com)

## CaptivateIQ

CaptivateIQ

CaptivateIQ “Assist” uses generative AI as an admin copilot for commissions—answering plan questions, drafting explanations, and streamlining dispute resolution while keeping one clean source of truth.

[captivateiq.com](https://captivateiq.com)



Incentive Compensation Management by Salesforce

Automate your commission plans in real-time on your CRM platform. Incentive Compensation Management gives sellers visibility into earnings, empowers finance with scalable accuracy, and aligns compensation to performance across the organisation.

[salesforce.com/sales/incentive-compensation-management/](https://salesforce.com/sales/incentive-compensation-management/)



Everstage

Everstage is an AI-native incentives platform that automates payouts, offers live rep visibility, and uses ML-driven accuracy to align compensation with revenue goals at scale.

[everstage.com](https://everstage.com)

## | COMPENSATION MANAGEMENT



Performio

Performio pairs automated ICM with AI-powered analytics (Analytics Studio) for dashboards, what-ifs and insights—improving accuracy, compliance and motivation across complex plans.

[performio.co](https://performio.co)

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Visdum

Visdum's AI-Adaptive modeling and an in-product AI Copilot guide plan design, validate calculations, and resolve errors instantly—delivering transparent commissions with real-time dashboards.

[visdum.com](https://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.

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# Partner Ecosystem Platforms



## PARTNER ECOSYSTEM PLATFORMS

Partner ecosystem platforms have become critical infrastructure for B2B organizations in 2026, as indirect sales channels and co-selling motions account for an increasing share of enterprise revenue. These intelligent platforms transform fragmented partner relationships into coordinated revenue engines, enabling seamless collaboration, data sharing, and joint selling at scale.

Modern partner ecosystem management goes far beyond simple partner portals. These platforms create a unified system where businesses and their partners can identify overlapping opportunities, coordinate account strategies, and collaborate on deals in real time. For organizations with complex partner networks spanning resellers, technology partners, and service providers, these tools provide the visibility and coordination needed to turn partnerships into predictable revenue streams.

These platforms integrate securely with CRM systems, marketing automation tools, and sales platforms from both your organization and your partners. This bi-directional data flow enables real-time visibility into shared accounts, eliminating the manual coordination that slows down partner deals.

In the AI era, leading organizations recognize that partner ecosystems aren't just alternative sales channels. They're strategic multipliers that extend market reach, accelerate deal cycles, and unlock opportunities that would be impossible to capture alone. The vendors below represent the most sophisticated partner ecosystem platforms available.



## | PARTNER ECOSYSTEM PLATFORMS



Crossbeam

Crossbeam's ecosystem platform now unifies networks (after merging with Reveal) and turns second-party intent into action—using AI-recommended plays, partner intros and influence tracking to drive revenue.

[crossbeam.com](https://crossbeam.com)



PartnerTap

PartnerTap automates secure account mapping and pipeline sharing; ecosystem-aware automations surface whitespace and co-sell opportunities for faster joint wins.

[partnertap.com](https://partnertap.com)



PartnerStack

PartnerStack adds AI Matches to surface ideal partners and speed recruitment while its PRM automates payouts, onboarding and performance tracking across partner programs.

[partnerstack.com](https://partnerstack.com)



Impartner

Impartner infuses PRM with AI—optimizing partner marketing (e.g., auto-tuned paid media, personalized newsletters) and providing an AI playbook to guide practical adoption across the partner lifecycle.

[impartner.com](https://impartner.com)

## | PARTNER ECOSYSTEM PLATFORMS



Channelscaler

ChannelScaler optimizes partner recruitment, enablement, and performance through automation and data-driven insights. Its AI-powered platform identifies high-potential partners, streamlines onboarding, and provides real-time visibility into channel activity to accelerate partner-led growth.

[channelscaler.com](https://channelscaler.com)

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WorkSpan

WorkSpan's Ecosystem Edition + WorkSpan AI act as "AI teammates" in the CRM—suggesting the best partner actions, orchestrating co-sell plans, and measuring pipeline impact across alliances.

[workspan.com](https://workspan.com)

### In a nutshell

Partner ecosystem platforms enable B2B companies to turn partner networks into measurable revenue engines. These platforms centralize partner data, automate workflows, and bring visibility to shared opportunities across marketing, sales, and customer success. By integrating directly with CRMs and sales tools, they reveal overlapping accounts and mutual customers, help prioritize co-selling opportunities, and track deal progress in real time. Advanced analytics and dashboards measure partner influence, sourced revenue, and pipeline contribution, giving both sides a clear view of performance. Ultimately, partner ecosystem platforms align teams, strengthen collaboration, and make partnerships a scalable, data-driven growth channel rather than a manual, opaque process.



Vainu connects directly with your CRM and AI agents, keeping Nordic company and contact data fresh, complete, and actionable, no manual work needed. Our AI-ready data flows into your workflows to power reliable, real-time decisions.

Founded in Helsinki in 2013, Vainu now helps over 10,000 sales, marketing, and data professionals turn verified Nordic company data into timely, relevant actions across CRMs, marketing tools, and AI-powered systems.

Learn more at: [www.vainu.com](https://www.vainu.com)