



# AI-powered Virtual SDR Agents

*Tools to amplify sales outreach and deal qualification*

## 2025 CONSTELLATION SHORTLIST

The Constellation ShortList™ presents vendors in different categories of the market relevant to early adopters. In addition, products included in this document meet the threshold criteria for this category as determined by Constellation Research. This Constellation ShortList of vendors for a market category is compiled through conversations with early adopter clients, independent analysis and briefings with vendors and partners.

### ABOUT THIS SHORTLIST

While artificial intelligence (AI) tools have been injected into the sales process for some time, a new wrinkle is deploying AI-powered digital “SDR agents” to cover some, or all, of the sales prospecting process. AI SDR agents are an evolution from the “chatbot” concept in that they can be more proactive, multi-channel, and handle significantly more complex exchanges with potential and existing customers. These “agents” can have access to entire (and sometimes highly complex) product catalogs, pricing models, etc. to better educate and engage with potential buyers across web, email, SMS, etc.

The benefit to users is that these agents can be “always on” versus the limitations of solely human sales development teams. They can leverage multiple channels to engage 24/7. Also, AI-powered SDRs can be multi-lingual. This both increases the productivity of SDR teams, but also allows companies to expand their sales reach without significant human capital expenditure. Many of these tools are easy to configure and offer out of the box integrations with CRM systems, to provide a fast time to value.

This is still a somewhat nascent area of development, and buyers should tread carefully. As with other generative AI tools, these agents are only as good as their tuning and administration and can be prone to making some mistakes/hallucinations or present other AI-created toxicity to the customer. We recommend using AI agents in conjunction with, not as replacements for, human SDR teams in the sales organization. Also, more CRM and sales automation platforms are adding out of the box agentic AI tools, and SDR agents are a popular use case – so look to value by leveraging existing investments but watch for hidden “gotcha” pricing on some CRM providers AI agent offerings.












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To learn more about Constellation Research Shortlists visit:  
[www.constellationr.com/ShortList](http://www.constellationr.com/ShortList)

## 11 SOLUTIONS TO KNOW

Constellation evaluates more than 12 solutions categorized in this market. This Constellation ShortList is determined by client inquiries, partner conversations, customer references, vendor selection projects, market share, and internal research.

-  11X
-  ARTISAN
-  AiSDR
-  FULL CONTEXT
-  MICROSOFT
-  OUTREACH
-  QUALIFIED (PIPER AI SDR)
-  RELEVANCE.AI
-  REGIE.AI
-  SALESFORCE EINSTEIN SDR AGENT
-  SERVICENOW AI AGENT

## THRESHOLD CRITERIA

Constellation considers the following criteria for these solutions:

- Integration with key systems, such as CRM, product catalog/CPQ and ERP to provide accurate and timely product and pricing responses
- Autonomous ability to make low-level decisions and move conversations forward
- Provide built-in guardrails and monitoring tools to ensure effectiveness, safety and security
- Unified communication capabilities across email, web chat, SMS, WhatsApp, etc. to facilitate a 24/7 response and outreach channel
- Offer multi-lingual capabilities to expand SDR team outreach on a global level
- Automated workflow and tasks management, to ensure requests for information and other pre-sales tasks are quickly addressed by either systems or by humans
- Automated meeting scheduling to provide convenience to prospective buyers
- Ability to generate follow up communications, either to be sent by a human or the system
- Creation of interaction summaries for use by humans later in the sales cycle; automatically stored in the CRM
- No code/low code setup and administration of agents

## ABOUT CONSTELLATION RESEARCH

As an award-winning Silicon Valley-based strategic advisory and futurist analyst firm, Constellation Research serves leaders and organizations navigating the challenges of digital strategy, business-model disruption and digital transformation. Constellation works closely with solution providers, partners, C-suite executives, board of directors, and its Constellation Executive Network of buy-side leaders to lead the way in research coverage and advise clients how to achieve valuable business results.

## FREQUENCY OF EVALUATION

Each Constellation ShortList is updated at least once per year. Updates may occur after six months if deemed necessary.

## EVALUATION SERVICES

Constellation clients can work with the analyst and the research team to conduct a more thorough discussion of this ShortList. Constellation can also provide guidance in vendor selection and contract negotiation.

## BUSINESS THEMES



Digital Marketing & Sales Effectiveness



Next Generation Customer Experience



Future of Work



## Martin Schneider Vice President & Principal Analyst

Martin Schneider has had a unique career that has spanned both analyst and marketing practitioner roles, focused on high technology and related industries. The unifying factor has always been both a keen analysis of go-to-market trends, while also having achieved success as a marketing leader. Schneider started his career as a journalist covering B2B technologies, and quickly transitioned into a leading analyst covering application software for the 451 Group in NYC, where he specialized in CRM, marketing automation, and business intelligence/analytics technologies.

