



# Sales Force Automation

*Software to support revenue growth and account engagement*

## 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

Sales force automation (SFA) solutions focus on documenting and addressing the entirety of the sales process - automating actions and outcomes of the go-to-market process as a means to improve productivity of the sales force. Modern SFA tools are extending core SFA competencies like lead, contact, account, and opportunity tracking to also include tools that impact usability and adoption including data enrichment and platform extensibility.

Sales automation tools are seeing a new age of innovation, as generative and agentic AI tools reinvigorate the design and use of sales applications. Generative AI can drive seller productivity by capturing email and call transcripts to provide summaries, next-best actions, etc. Meanwhile, AI agents can automate key business tasks such as scheduling follow up calls, crafting and sending proposals, etc. These advancements both drive user productivity, but also improve adoption and, in turn, more improved accuracy of system data that can drive more precise forecasting and pipeline analysis.

In addition to AI tools, more SFA providers have integrated with their own "data clouds" or third-party data services to add an extra layer of data richness to the system. Today, a well deployed, data-rich sales automation solution can provide insights to seller that they could not surface themselves - optimizing both their daily sales actions as well as highlighting paths to quota with the least amount of effort, identifying deals most likely to close using AI/ML analytics.

Shortlist vendors are also closing the gap when it comes to configuration and integration with other critical front-office systems by offering more composable architectures. Leveraging more "low code" customization and cloud connectors to more seamlessly integrate and manage data flows between systems and third-party data sources drives faster deployment times, and creates a data rich, more bespoke system more likely to be seen as valuable by sales users. Low-code environments are especially appealing for smaller businesses, who might lack the resources for third-party services but still require strong workflow automation and integration to other systems.

### LIKE WHAT YOU SEE?

Consider partnering with Constellation Research on your go-to-market-strategy. Email [ShortList@ConstellationR.com](mailto:ShortList@ConstellationR.com) for more info.

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

## 14 SOLUTIONS TO KNOW

Constellation evaluates more than 70 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.

### ENTERPRISE SOLUTIONS

- **MICROSOFT DYNAMICS 365**
- **ORACLE FUSION SALES**
- **SALESFORCE SALES CLOUD**
- **SAP SALES CLOUD**
- **SERVICENOW**

### SMB SOLUTIONS

- **BSI CRM**
- **CREATIO**
- **COPPER**
- **HUBSPOT SALES HUB**
- **INASIGHTLY**
- **MONDAY SALES CRM**
- **SUGAR SELL**
- **WORKBOOKS CRM**
- **ZOHO CRM PLUS**

## THRESHOLD CRITERIA

Constellation considers the following criteria for these solutions:

- Ease of use, user interface
- Ability to track leads, prospects and customers through sales cycle
- Marketing integration for full prospect engagement visibility
- Customer support integration and visibility to effectively manage post-sale engagement
- Extensibility through ecosystem of third-party integration apps
- Productivity tools and extensions to increase usage and adoption
- Focus on mobility and collaboration
- Advanced analytics and role-based reporting
- AI/ML powered virtual assistants
- Advanced forecasting leveraging AI/ML
- Custom workflow creation with clicks, not code
- Product vision and roadmap
- Pricing packages
- Post-sale support and community

## 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.



### 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.

