

Cool Vendors in Generative AI for B2B Sales

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

Chief sales officers need to explore generative AI to alleviate overburdened sales workloads, but the pace of innovation in the GenAI sales technology market is difficult to follow. Use this Cool Vendors research to explore five vendors that are disrupting two core GenAI for sales use cases.

Overview

Key Findings

- CSOs are curious to explore how generative AI (GenAI) can support their understaffed seller, sales management, enablement and operations workloads.
- The market for GenAI in sales technology has advanced so quickly that it's difficult to maintain a current perspective.
- GenAI disruptions manifest in sales technology in three ways: turning unstructured data sources into insights sellers can use to adapt their tactics; changing how sellers collaborate with technology to get work done; and automating entire (or parts of) sales workflows for productivity.
- Two GenAI for sales use cases stand out today since they provide immediate productivity benefits: generative value messaging (GVM) and AI sales assistants. Gartner has identified five vendors that support one or both use cases.

Recommendations

- Improve sales outcomes with GenAI by helping sales and technology teams turn unstructured data into insights sellers can use to adapt tactics, change how sellers collaborate with sales tech, and automate new sales workflows.
- Prioritize GenAI use cases directly benefiting the frontline sales team by piloting GVM and AI seller assistant use cases.
- Reduce implementation complexity by prioritizing vendors that offer pilots with prebuilt minimal configuration, easy trials or freemium products before committing to enterprise software purchases.

Strategic Planning Assumptions

By 2026, B2B sales organizations using GenAI-embedded sales technologies will reduce the amount of time spent on prospecting and customer meeting prep by over 50%.

By 2026, sales teams using GenAI to generate proposals and bid responses will spend an average of 16-17.5 hours per RFP, down 35-40% from 2023, without sacrificing win rate.

By 2028, 60% of B2B seller work will be executed through conversational user interfaces via generative AI sales technologies, up from less than 5% in 2023.

Analysis

This research does not constitute an exhaustive list of vendors in any given technology area, but rather is designed to highlight interesting, new and innovative vendors, products and services. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

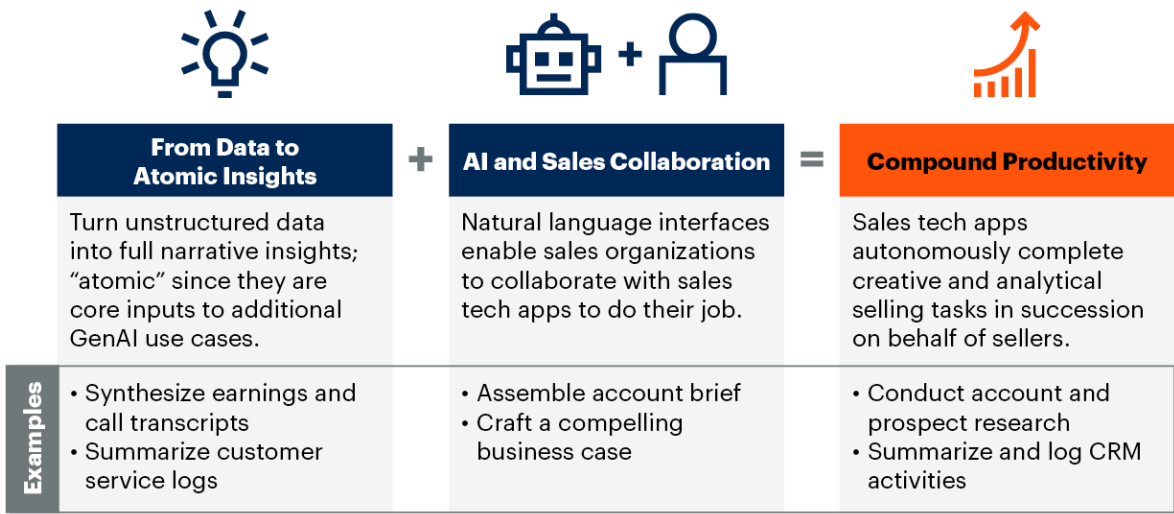
What You Need to Know

Many CSOs want to include GenAI in sales strategy and roadmapping activities to gain short-term productivity benefits, but the market is advancing so quickly that it's difficult to maintain a current perspective. GenAI disrupts how sales organizations interact with information and generate content. Early studies suggest the productivity gains from using GenAI are substantial. For example, business professionals who used AI indicated they could write 59% more business documents per hour. ¹ Today, these disruptions manifest in three ways across the sales technology market (see Figure 1):

- **Turn data into atomic insights:** Synthesizing different sources of unstructured data, creating full narrative insights. Atomic insights are core inputs for more dynamic GenAI use cases (e.g. synthesize earnings and meeting transcripts, summarize customer service logs).
- **Facilitate collaboration between sellers and AI:** Natural language interfaces enable sales organizations to interact with sales tech apps in new ways to execute deal-related activities (e.g. assemble an account brief, draft an RFP response, craft a business case).
- **Compound productivity gains from automation:** Sales tech apps compound productivity by autonomously completing creative and analytical selling tasks in succession on behalf of users (e.g. Update CRM records, recommend next-best-action activities, conduct account and prospect research). ²

Figure 1: GenAI Disruptions to B2B Sales Technology

GenAI Disruptions on B2B Sales Technology



Source: Gartner
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Gartner has identified nine actionable use cases for Gen AI in B2B Sales (see [Generative AI Strategic Planning Essentials for B2B Chief Sales Officers](#)), but recommends CSOs strategically prioritize GVM and AI seller assistant use cases in their tech roadmaps. These two use cases are commercially available *and* benefit the frontline sales organization.

Prioritize Generative Value Messaging and AI Seller Assistant Use Cases

Generative value messaging enables sales organizations to customize value messaging narratives for each buying team using GenAI and available customer data.

AI sales assistants augment sellers and managers by automating routine daily tasks and providing recommended actions.

For GenAI to deliver productivity gains, frontline sellers first need to be willing to use and be influenced by the technology. Without seller adoption, it will be difficult for a sales organization to discern GenAI's impact on headcount, territory planning or compensation. Gartner has identified five cool vendors that support either the GVM and/or the AI seller assistant use cases. Table 1 introduces the vendors and how GenAI disruptions manifest in their products.

Table 1: Disruption Analysis for Cool Vendors in GenAI for B2B Sales

(Enlarged table in Appendix)

Vendor	Use Case Supported	Disruption Analysis
Amplemarket	<ul style="list-style-type: none"> ■ AI Seller Assistant ■ Generative Value Messaging 	<ul style="list-style-type: none"> ■ Convert account, contact, intent and technographic datasets into value messaging ■ Collaborate with sellers on targeted messaging ideas based on social profiles ■ Simplify prospecting workflows through product consolidation
Atrium	<ul style="list-style-type: none"> ■ AI Sales Leadership Assistant 	<ul style="list-style-type: none"> ■ Turn predictive analytics into explainable sales management coaching recommendations ■ CManagers collaborate with GenAI for management intervention ideas ■ GenAI automates end-to-end coaching analytics workflow
Copy.ai	<ul style="list-style-type: none"> ■ Generative Value Messaging 	<ul style="list-style-type: none"> ■ Configurable to turn unstructured data sources (i.e., earnings calls) into CRM insights ■ Collaborate with the platform to design enterprise GenAI messaging automations using enterprise content and data ■ Configurable to automate entire research and sales messaging workflows
Lavender	<ul style="list-style-type: none"> ■ AI Seller Assistant ■ Generative Value Messaging 	<ul style="list-style-type: none"> ■ Convert third-party data into atomic email messaging insights ■ Collaborate with sellers on improving email writing for sales outcomes ■ Streamline prospecting research and messaging design into a single product
Regie.ai	<ul style="list-style-type: none"> ■ AI Seller Assistant ■ Generative Value Messaging 	<ul style="list-style-type: none"> ■ Convert third-party data into atomic email messaging insights ■ Collaborate with GenAI to write sales cadences on behalf of the sales team ■ Centralize the design and distribution of AI-created sales content

Source: Gartner

Amplemarket

San Francisco, California, U.S. (www.amplemarket.com)*Analysis by Dan Gottlieb, Christopher Gamble, Guy Wood, Roland Johnson*

Why Cool: Amplemarket combines the power of GVM, a SEA and a revenue data solution into a unified product. It enables sales organizations to take advantage of OpenAI GPT-4 in outbound prospecting through a single vendor instead of the integration of multiple vendors. The product automates the process of prioritizing accounts based on signals, researching prospects at those accounts and enrolling prospects into cadences on behalf of sellers. Then, sellers collaborate with the product to author messaging based on a prospect's LinkedIn signals, such as company descriptions, news, hiring events, job descriptions and LinkedIn activity. Amplemarket's GenAI Copywriter removes the burden of prompt engineering for sellers by providing them with a one-click personalization experience embedded into buyers' LinkedIn page.

The user experience offers sellers simple interfaces to adapt messages, choose alternate styles or reprioritize signals before releasing via numerous channels. It adapts to user preferences, learns from usage to improve output, and becomes more effective in generating opportunities.

Challenges:

- The value of the product is limited to outbound prospecting, not additional GVM scenarios.
- The unified product limits customization for specialized industry coverage and plays.
- Spam filtering may evolve to spot GenAI-created messaging, which could minimize the effectiveness of unified products like Amplemarket that automate the entire prospecting process.

Who Should Care:

- High-growth companies with sales organizations focused on achieving heightened productivity, velocity and conversion impact on outbound prospecting.

Atrium

San Francisco, CA, U.S. (www.atriumhq.com)

Analysis by Dan Gottlieb, Christopher Gamble, Guy Wood, Roland Johnson

Why Cool: Atrium's AI-Sales Leadership Assistant provides AI-generated coaching recommendations to B2B sales managers with natural language to guide their talent development efforts. Instead of relying on tables and charts, using natural language simplifies how sales managers can assimilate insight and speed up applying those insights in their coaching.

Atrium uses GenAI to synthesize root-cause analysis for seller performance issues based on current state metrics pulled from SFA/CRM, email and calendars. These include seller activity, pipeline creation, pipeline hygiene and velocity. Atrium then generates specific recommendations for sales managers to use in coaching their reps — a more holistic approach than coaching deals. Atrium relieves the burden of prompt engineering on behalf of managers by packaging seller data into prompts aimed at generating recommendations that address seller-specific talent development issues, not deal-specific issues. Since Atrium is explicitly focused on individual seller behavior analysis, the recommendations streamline preparing for seller 1:1s and brainstorming ways to improve talent productivity.

Atrium's use of OpenAI GPT-4 LLM helps sales leaders overcome a major obstacle to data-driven-management: the low data literacy of sales professionals. Atrium reduces the risk of using LLMs by only sending metrics strings to the LLM.

Challenges:

- The product is designed to support new customer acquisition-focused sales roles, such as sales development representatives and account executives. It may be difficult to adjust the technology to support different sales role designs.
- The technology does not integrate with CRM products other than Salesforce.
- The LLM model is a foundation model, and is not fine-tuned to sales coaching and insight.

Who Should Care:

- CSOs seeking to gain substantial advantages from data-driven coaching and management.
- Sales managers seeking support for using seller performance data to develop the talent on their team performance.

- High-growth companies aiming for rapid sales scaling via hiring and promoting early career talent.

Copy.ai

Memphis, TN, U.S. (www.copy.ai)

Analysis by Dan Gottlieb, Christopher Gamble, Guy Wood, Roland Johnson

Why Cool: Copy.ai provides a GenAI automation platform and end-user chat tool for GVM tasks. The GenAI automation platform enables a centralized user to create a library of multistep GenAI processes (e.g., research a contact, synthesize insights, then design messaging) on behalf of the organization without any code. The platform works with integration platform as a service (iPaas) technology so users can pull in data from — and push GenAI outputs into — existing sales tech CRM products. A messaging strategist could compose a series of no-code applications that automate a wide range of enterprise value messaging use cases with GenAI using Copy.ai's workflow platform and an iPaas product. These include entirely automated use cases. For context, any sales tech product in the tech stack that pulls SFA records into documents, reports, and presentations can benefit from Copy.ai, like revenue enablement platforms or configure, price and quote (CPQ).

Copy.ai provides admins with a prompt engineering studio so they can centrally design prompts using retrieval-augmentation (meaning it incorporates enterprise data) and grounding (meaning GenAI outputs cite their sources). Users can apply enterprise content, internet search, and internal data assets in GenAI workflows. Users see cited sources in chat prompt responses, benefiting from higher-quality outputs they trust when completing research or messaging tasks.

Challenges:

- Designing GenAI automation workflows requires a unique combination of prompt engineering and automation expertise, which may take time for messaging strategists to master.
- The product is designed for a wide range of general sales and marketing use cases; clients will need to configure workflows for specialized sales use cases, such as sales prospecting or value selling methodologies.

- Fully automated creation and distribution of GenAI content can be risky since the content is susceptible to low-quality output and accuracy.

Who Should Care:

- CSOs seeking to incorporate GVM by improving account insight and streamlining the production of corporate and personalized communications.
- Messaging strategists striving to adopt mass personalization in outreach and nurture campaigns to increase the flow of quality leads.
- CROs of larger enterprises seeking to establish a single GenAI toolset on which to base numerous use cases/workflows across sales and marketing.

Lavender

New York City, New York, U.S. (www.lavender.ai)

Analysis by Dan Gottlieb, Christopher Gamble, Guy Wood, Roland Johnson

Why Cool: Lavender introduces an AI seller assistant designed to elevate B2B sellers' written interactions while preserving the human touch. It emphasizes coaching sellers how to refine their skills by explaining why suggested messaging adjustments are likely to yield a better outcome, ensuring quality over quantity in communication. Sellers actively collaborate with Lavender via dynamic, situational decision making associated with written communication, such as adjusting the tone and style of a reply for a unique type of buyer personality.

Lavender reduces the burden of prompt engineering for sellers by volunteering AI-generated messaging suggestions that sellers can choose to incorporate into a draft. For example, Lavender may use personality AI (among other inputs) to tailor a message based on an individual's purported DISC profile. Powered by a partnership with OpenAI and Cohere, Lavender's GVM focus uses diverse data points to enhance email drafts with personalized insights, which can help to improve conversion rates.

Challenges:

- Lavender's concentration on email as the sole communication channel may limit its capacity to use contextual insights from key data sources (e.g., call transcripts and opportunity records) that could influence the caliber of messaging recommendations.
- Concentration on email limits Lavender's versatility for other sales messaging use cases, such as crafting account-specific documents, reports or presentations.

Who Should Care:

- Individual contributors in sales teams looking for an email writing assistant.
- Sales leaders seeking incremental pipeline conversion improvement through email coaching.

Regie.ai

San Francisco, California, U.S. (<https://www.regie.ai/>)

Analysis by Dan Gottlieb, Christopher Gamble, Guy Wood, Roland Johnson

Why Cool: Regie.ai generates multichannel, multitouch sales cadences with GenAI then augments how sellers customize messaging within a cadence. Regie.ai relieves the burden of prompt engineering for centralized messaging strategists. It guides them to provide inputs for how Regie.ai gathers research, prioritizes data sources and creates targeted cadences based on the value messaging strategy (persona, product, pain points and value drivers) and existing messaging documentation stored in Regie.ai. Regie.ai pushes cadences into a sales organization's existing sales engagement application (SEA). The workflow is built around a human-in-the-loop, so sellers can research and personalize outputs before sending messages from their SEA based on the context of the cadence.

Whereas messaging strategists used to manually draft every touch and message for each cadence, Regie.ai deploys GenAI to address the cumbersome cadence creation, execution and management process SEA administrators face. Regie.ai partners with OpenAI to offer a mix of fine-tuned GPT-3, GPT 3.5-turbo and GPT-4 LLMs.

Challenges:

- Regie.ai's AI seller assistant (Co-Pilot) is designed to augment SEAs; organizations without a SEA may not find the product as valuable.

- Regie.ai's seller UX is designed primarily for sales engagement activities (email, social, and calls) limiting its application for content types commonly used in later deal stages (e.g., business cases, targeted presentations).
- Regie.ai is not optimized for businesses lacking the messaging strategist resources required to scale GVM.

Who Should Care:

- Messaging strategists responsible for sales engagement applications and strapped for bandwidth to develop enterprise-scale prospecting sales cadences for the sales team to use.
- CSOs with a net-new logo sales strategy dependent on outbound prospecting to hit their revenue targets.
- CROs looking for continuity between brand messaging and sales execution.

Where Are They Now?

Second Nature AI

Tel Aviv, Israel (www.secondnature.ai)

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

Why Cool Then: Second Nature AI was cool in 2021 because of “Jenny,” an AI real-time voice virtual role-play bot, a key use case for a Sales Learning Gymnasium. Jenny is a sales role-play avatar built on a pretrained AI model for B2B selling. These scenarios can replace the need for “live” managers or experts to facilitate roleplay certification, enhancing the scale of training and onboarding programs. **Where They Are Now:** Second Nature AI raised a \$12.5M Series-A funding round in 2022. It has expanded its enterprise business beyond technology verticals to support education, insurance, banking and telecom. The vendor also advertises that its solution supports use cases beyond B2B sales, such as customer support and HR. **Who Should Care:** CSOs with distributed organizations and complex selling scenarios, such as multiple buyers, product lines, industries, segments and sales stages.

Wingman by Clari

Sunnyvale, California, U.S. (<https://www.clari.com/>) Profiled in [Cool Vendors in Conversation Intelligence for B2B Sales](#) **Why Cool Then:** Wingman provided two solutions that didn't require the user to possess a high level of data literacy: a dashboard to help manage deals, called Deal Central, and real-time sales coaching in web meetings. Wingman's real-time in-call technology provides tailored guidance and targeted reminders for sellers. Its AI listens to both sides of calls, providing prescriptive next steps and additional contextual information on what is being said by both the sales rep and customer. For example, it may display real-time relevant content in or phrasing to help a sales rep overcome a customer's objections.

Where They Are Now: Wingman was acquired by Clari in summer 2022 for an undisclosed amount. It's now offered as Clari Copilot. Clari has 1,500+ customers as of August 2023. In addition to core conversation intelligence, the Copilot product has GenAI features such as call summaries, the first of Clari's RevGPT products. Clari recently acquired Groove, a SEA, to add a system of action to its revenue intelligence product.

Who Should Care: CSOs in technology and telecom, healthcare, business services and financial services.

Gong

San Francisco, California, U.S. (<https://www.gong.io/>) Profiled in [Cool Vendors in CRM Sales, 2017](#) **Why Cool Then:** Gong.io was an early voice analytics solution for B2B sales, using AI to analyze sales conversations and deliver contextual, relevant insights into the quality of the sales call with a prospect.

Where They Are Now: Gong surpassed 4,000 customers in July 2023, is a player in the revenue intelligence platform market, and recently released a SEA called Engage. Engage offers capabilities like call summaries, streamlining account research, creating a seller to-do list, composing emails, a writing assistant and a script generator for cold-calling to support GVM and AI seller assistant use cases.

Who Should Care: CSOs in technology and telecom, services, and media.

Evidence

¹ 2023 Gartner GenAI for B2B Sales Polls: Results of these polls come from a population that expressed interest in AI by attending a 2023 Gartner virtual event/webinar. Current sample size for this note comes from the 1 July Virtual Executive Retreat for Sales Leaders (n = 52 respondents) and 2 July webinar “How B2B Sellers Can Use Generative AI to Grow Revenue” (n = 89 respondents), for a total of 141 respondents. Disclaimer: Results of these polls do not represent global findings or the market as a whole, but reflect the sentiments of the respondents surveyed.

² [AI Improves Employee Productivity by 66%](#), Nielsen Norman Group.

Note 1: General Tasks GenAI Can Complete

- **Text generation:** Creating human-sounding and meaningful text, based on a given prompt.
- **Text completion:** Filling in missing or incomplete information in a given text in prompt.
- **Text classification:** Assigning a format label to a given text, based on its content or meaning (for example, story, biography or letter).
- **Text summarization:** Producing a shorter version of a given text that retains its main ideas.
- **Text translation:** Converting text from one language to another.
- **Sentiment analysis:** Determining the emotional tone or opinion expressed in a given text.
- **Text correction:** Fixing errors, spelling mistakes, grammar issues, or incorrect words in a given text.
- **Text manipulation:** Changing or modifying text, such as changing words or phrases, removing or adding content, or transforming the text structure.
- **Named entity recognition:** Identifying and extracting named entities (such as people, organizations, locations or events) from a given text.
- **Question answering:** Providing a specific answer to a given question.
- **Style translation:** Transforming the writing style of a given text, such as changing its tone, formality or writing genre.
- **Format translation:** Converting a text from one format to another, such as converting instructions from prose to a numbered list.
- **Simple analytics:** Performing basic data analysis on a given text, such as counting words, finding the frequency of specific terms, or calculating sentiment scores.

Recommended by the Authors

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

[Innovation Insight: Generative Value Messaging Empowers B2B Sales With Words That Win](#)

[Innovation Guide for Generative AI in Sales](#)

[Market Guide for Sales Engagement Applications](#)

[Generative AI Strategic Planning Essentials for B2B Chief Sales Officers](#)

[Adopt a GenAI Literacy Framework to Unlock Sales' Potential](#)

[Multidimensional CRM: How GenAI Will Revolutionize Sales Force Automation Platforms](#)

[How to Pilot Generative AI](#)

[Sellers Need Technology as a Teammate Not a Tool](#)

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Source: Gartner