

Section 1: Executive Summary & Key Insights (TL;DR)

- Top Pain Points: Onboarding & setup delays (~2 months), integration friction, high false positives (90–95%).
- Largest Gap: SME-first, cloud-native platform with prebuilt connectors and AI-assisted triage.
- Promising Market Opportunity: SMEs upgrading from spreadsheets due to EU/US sanctions tightening; cloud-native adoption surging.

Section 2: Deep Dive into User Pain Points & Needs

A) Onboarding & Setup

Users report complex implementations (SAP GTS) and ~2 month time-to-implement (Descartes). Teams need guided setup & sandbox data to be proficient within days.

B) System Integration

Integration challenges include ID mismatches, data hygiene, rate limits, and order-event timing issues, leading to stalled or duplicate screenings.

C) False Positives

90–95% of alerts are false positives, consuming analyst time and slowing deals. Teams rely on whitelists and spreadsheets as manual workarounds.

D) Pricing & Affordability

Pricing complaints include enterprise minimums, long contracts, and high setup costs. SMEs favor volume-based transparent tiers with month-to-month options.

E) Reporting & Audits

Users request configurable audit packs, one-click evidence exports, and cross-doc traceability for stress-free external audits.

F) Support & Training

Enablement quality and expert response speed are critical during go-live and audits; users want faster resolution playbooks.

Section 3: Competitor Landscape Analysis

Vendor	Strengths	Weaknesses
Descartes VC/DPS	Deep list coverage, SAP integrations, high adoption	Price escalates at enterprise tiers, integration rough edge
SAP GTS	End-to-end GTM, strong compliance depth.	Complex & costly implementation, steep learning curve
ONESOURCE GTM	Global regulatory content, cloud-ready, AWS & SAP integrations	Difficult onboarding, heavy footprint for SMEs
Amber Road/E2open	Global suite spanning classification, logistics, content	Pricing & integration effort high for SMEs.
Shipping Solutions	Low entry price, targeted modules (AES filing, doc mgmt)	Agging UI, limited recent social proof, shallow depth.

Section 4: Market Sizing, Growth & Drivers

GTM software market estimated at \$1.2–2.7B, CAGR 5–10% through 2030. Large enterprise adoption dominates but SMEs growing fastest with cloud lowering TCO.

Regulatory drivers: EU sanctions packages 14–18, OFAC/BIS updates driving real-time screening demand and audit readiness requirements.

Section 5: Actionable Recommendations

- UX & False Positives: Add explainable entity resolution, tunable thresholds, and governed auto-close rules to cut FP 10–20% in 90 days.
- Integration Standards: Offer RESTful JSON APIs, pre-built ERP/OMS/CRM connectors (SAP B1, NetSuite, D365, Shopify, Salesforce).
- Pricing & Packaging: Publish transparent volume tiers with minimal setup fees, month-to-month options for SMEs.