

Magic Quadrant for Revenue Action Orchestration

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Revenue action orchestration platforms are emerging as the cornerstone of AI-first sales execution. Sales operations leaders should evaluate RAO vendors based on their ability to deliver autonomous guidance, consolidate revenue signals and scale execution across complex go-to-market motions.

Market Definition/Description

Gartner defines the revenue action orchestration (RAO) market as a category of technology vendors that use AI to improve sales productivity. Vendors capture revenue signals into one normalized data model, creating an AI-ready commercial dataset. RAO serves as the primary system of seller action and a single source of truth for sales interactions. For sellers, RAO facilitates AI-guided decision making and helps execute sales actions across multiple channels. For operations, RAO integrates AI into deal management, pipeline analytics and forecasting.

Traditional sales force automation (SFA) implementations often require sellers to invest time in administrative activities and don't provide enough insight and guidance to materially boost productivity. Sellers commonly resist or otherwise fail to document deep intelligence uncovered during customer interactions and internal planning and research. Even when they do, limited data interoperability among sales systems prevents this data from being truly AI-ready.

For the seller, guidance provided by traditional SFA and sales engagement applications is often siloed by use case. For example, recommendations on deal execution, account planning and relationship management are informed by disconnected data sources and lack

orchestration among commercial workflows. Additionally, the proliferation of these multiple applications within traditional user interfaces may actually increase seller burden, inhibiting adoption of new sales technologies.

For sales operations, traditional sales engagement solutions fail to help leaders design and distribute AI-guided actions that are novel, credible and suitably specific enough to benefit frontline seller productivity. When sellers are skeptical of the recommendations they receive, adoption is further inhibited.

For sales leadership, challenges with deriving insights from AI make it difficult to fully incorporate activity intelligence into their decision making. While traditional SFA and revenue intelligence solutions provide insights into pipeline health and sales forecasting, they often fall short on combining AI insights from a range of commercial use cases to offer interpretations, predictions and recommendations to sales leaders.

RAO applications address these challenges by:

- Logging and analyzing customer interactions, including emails, meetings, chats and web calls automatically.
- Providing AI-guided sales actions based on account characteristics and interaction history.
- Helping sellers create and send emails, make calls, and plan, conduct and transcribe meetings.
- Providing a seller action platform for managing AI-generated recommendations that serves as a primary system of action for multiple use cases.
- Offering programmable action orchestration for admins to define workflows and configure AI.
- Helping managers to navigate large volumes of data to coach sellers and submit forecasts.

Mandatory Features

The mandatory features of this market include:

- Advanced activity intelligence — Detects buyer interactions in other systems (e.g., email, calendars, web meeting platforms and team collaboration tools) and turns this

information into insight. Applies AI to extract metadata (e.g. sentiment, topics, action triggers) and indexes results for querying to provide insight into the quality of an interaction and inform RAO AI capabilities (e.g., AI guided actions, deal scoring).

- AI sales assistant — Provides an easy-to-use interface for sellers to ask questions, receive guidance or nudges, access collateral and compose customer communications. Supports a variety of user experiences (e.g., web app, a chat-based UX, browser extension, in collaboration apps.)
- AI-guided actions — Builds a prioritized next-best-actions queue using account intelligence, deal context and advanced activity intelligence signals. Delivers real-time guidance and enables sales teams to dispatch AI agents to execute work.
- Deal scoring — Calculates deal health scores, win probabilities, and risk flags for every opportunity by combining advanced activity intelligence with deal context within a specified time frame.
- Programmable action orchestration — Orchestrate AI-guided actions with an action library and workflow automation builders. Enables editable rules-based automation (e.g., cadences) and agentic workflow design (e.g., next best actions). Includes modules to govern the platform (e.g., AI agents, accessibility and content permissioning) and optimize actions (e.g., performance tracking).
- Pipeline analytics — Delivers dashboards with consolidated opportunity views, funnel-conversion metrics, win/loss analyses and market-level insights. Supports configurable sales methodologies and business models. Incorporates RAO intelligence (e.g., account, buyer, deal scoring, advanced activity) to offer insight into team and individual performance.
- Data interoperability — Provides a consolidated revenue data model that captures, snapshots and writes-back across CRM, data lakehouses and third-party technologies. Provides a customizable metrics studio. Data is consumable by AI for consistent interpretation and action (i.e., is AI-ready).
- Knowledge base — Houses a centralized repository of revenue context (e.g., best practices, playbooks, messaging and product info) organized in RAO's knowledge architecture. Continuous AI/ML optimization keeps context up to date, supporting AI-guided actions and AI sales assistant capabilities.

Common Features

The common/optional capabilities for this market include:

- Account intelligence — Aggregates and retains account relationship histories alongside AI-driven research, account-level buying intent signal and third-party signals. Scores and ranks relationships by signal strength and buying stage. Supports account planning, then informs AI-guided actions and deal execution.
- Multichannel buyer engagement — Integrates email, dialer, SMS and advanced channels (e.g. video, social, website, direct mail) into a single interface. Logs and aggregates all outbound and inbound engagement.
- Sales skills coaching — Offers conversation libraries, comparative performance benchmarks and seller scorecards tied to activity and outcome metrics. Identifies coaching opportunities and suggests targeted coaching opportunities.
- Buyer intelligence — Synthesizes prospect and contact engagement histories, AI-led research outputs and contact-level intent signals. Generates prospect scores and informs prescriptive engagement tactics.
- Sales forecasting — Uses augmented analytics and AI-forecast models to generate bottom-up revenue predictions, roll them up through territory and organizational hierarchies. Configurable to the operating rhythm of different business models, business units and segments.
- Scheduling automation — Automates one-on-one and group appointment booking, time-zone coordination, and reminder workflows. Integrates calendar availability and preferred time slots.
- Mobile app — Extends seller RAO capabilities (e.g., AI sales assistant, guided actions, and advanced activity intelligence) into a native mobile experience. Sellers receive real-time nudges, capture signals in the field and execute tasks. Captures on-the-go signals and interactions.

Magic Quadrant

Figure 1: Magic Quadrant for Revenue Action Orchestration





Gartner

Vendor Strengths and Cautions

Aviso

Aviso is a Challenger in this Magic Quadrant. Its product, Aviso AI, is used globally across North America, EMEA and Asia/Pacific, with customers concentrated in the enterprise segment within the technology, financial services and pharmaceutical industries. Its roadmap emphasizes improvements to its Agent Studio (a no-code builder for custom GTM AI workflows), the launch of Halo (a real-time guidance layer that overlays seller workflows) and additional AI avatars.

Strengths

- **Pipeline analytics and forecasting:** Aviso's time-series data architecture tracks deal changes over time using a four-rolling-quarter approach, and its hybrid deal health and pipeline risk models combine structured data (e.g., close dates, pipeline stages) and unstructured signals (e.g., call transcripts, emails). It offers a multidimensional Pipeline Health Pentagon scoring model, across coverage, quality, maturity, spread and qualification, with adaptive benchmarks from historical conversion trends.
- **Vertical/industry-specific offering:** Aviso supports customization for verticals such as financial services and pharmaceuticals with tailored workflows, compliance features and domain-specific AI agents. Users can also configure sales methodologies, coaching frameworks and account planning modules. Aviso also partners with implementation firms and GTM consultants to support vertical deployment strategies.
- **Knowledge base flexibility:** Aviso's revenue context repository supports AI-guided actions and seller workflows. Continuously updated with structured and unstructured data from internal and external sources — including product documentation, and market intelligence — it powers real-time guidance, premeeting briefs and automated collateral generation, with role-based access controls and audit trails.

Cautions

- **Multichannel buyer engagement:** Aviso offers baseline prospecting channels, but partnership ecosystem limitations inhibit the use of advanced engagement channels used for enterprise selling (e.g., video messaging, direct mail/gifting). This is especially relevant for SDR/BDR motions requiring high volumes of strategic multichannel outreach.
- **Scheduling automation:** Aviso customers will need a Calendly subscription to offer automation for one-on-one and group appointment coordination, time zone coordination and reminder workflows. Aviso's native meeting coordination may limit flexibility for teams requiring embedded scheduling workflows or advanced calendar logic. This may introduce friction for sellers who need to coordinate meetings directly from within deal or account views, especially in high-volume or multistakeholder selling environments.
- **Customer success model:** Aviso identifies customer success and implementation services as its primary retention drivers. It offers limited specialized programs for verticals or segments. This may reduce its appeal to buyers with complex onboarding, change management or renewal workflows.

Clari

Clari is a Leader in this Magic Quadrant. Its Revenue Orchestration Platform is primarily used in North America and EMEA, with most customers in the enterprise and upper midmarket segments across technology, financial services, professional services and healthcare. Its roadmap includes AI-led seller guidance, programmable action orchestration, vertical-specific configurations, and enhancements to Clari Guide, Ask Clari, the Revenue Context platform, and consumption-based forecasting. It is focusing on CRM independence (i.e., the ability to work with multiple CRMs) and agentic AI.

Clari and Salesloft closed their merger on 3 December 2025, during the process of the research period for this Magic Quadrant. At the time of publication of this document, both Clari and Salesloft met the inclusion criteria for this Magic Quadrant. Gartner will provide additional insights and research to clients as more detail becomes available.

Strengths

- **Deal scoring and pipeline analytics:** Clari's multisignal deal scoring combines structured CRM data with unstructured activity intelligence, including sentiment, stakeholder engagement and conversation metadata. Its time-series pipeline analytics provide details on deal progression, conversion velocity and win/loss trends, enabling sellers and managers to act on real-time risk signals and historical patterns.
- **Sales forecasting:** Clari supports flexible forecasting across subscription, usage-based and consumption models with configurable roll-ups for product lines, territories and split ownership. Its AI-driven forecast recommendations are grounded in historical deals and activity trends, contributing to forecast accuracy and adaptability across complex enterprise hierarchies.
- **Scheduling automation:** Clari's scheduling capabilities streamline meeting coordination across time zones and teams. It integrates with calendar systems, enabling sellers to embed scheduling links directly into outbound customer engagement flows. It also supports automated reminders and collaborative scheduling, reducing friction and improving buyer engagement.

Cautions

- **User experience:** Navigating the various modules of Clari's capabilities suite can be complex and unintuitive. The user experience relies heavily on Clari Guide to surface

relevant workflows, and effective usage often requires structured onboarding and training to avoid confusion across modules.

- **External buyer intelligence integration:** Clari's AI-led buyer research connects to GTM data applications but lacks integration with external web content such as news, earnings calls and media sentiment. This limits the breadth of buyer context available during strategic planning and outreach.
- **AI sales assistant:** The Ask Clari assistant is not yet grounded in a configurable knowledge base (e.g., connecting customer questions to specific product configurations, industry positioning, strategic sales methodology plays), limiting an enablement team's ability to embed enablement content into AI Sales Assistant workflows.

Gong

Gong is a Leader in this Magic Quadrant. Its Revenue AI Operating System is used in North America, EMEA and Asia/Pacific, with customers ranging from small and midsize businesses to global enterprises, primarily in financial services, healthcare and technology. Its roadmap includes Gong Orchestrate (AI orchestration for automating more complex motions like cross-sell or engaging lost accounts), AI Builder (researching and recommending winning sales plays), and AI Trainer (embedded AI role-play adapting to the rep's skill level).

Strengths

- **Ease of use:** Gong offers a seamless user experience across pipeline generation, deal management, forecasting and coaching. Its AI agents are context-aware and natively integrated into workflows, enabling sellers to complete tasks without switching tools. The platform has an intuitive design and consistent UX across web, mobile and extensions.
- **Data interoperability:** Gong's proprietary architecture, Gong Revenue Graph, consolidates structured and unstructured data into a real-time, queryable layer. It supports consistent metric definitions (enabling RevOps to customize business metrics with exact calculations, using formulas and filters), cross-entity analytics, and AI-readiness across all modules. Gong's open ecosystem includes integrations, public APIs and native support for data lakehouses, enabling customers to unify revenue data and extend insights across their tech stack.
- **Customer experience:** Gong's customer success program centers on business outcomes. Customers receive strategic planning, value realization workshops, and tailored

enablement aligned to their operating rhythm. Gong's ability to correlate product usage with performance metrics supports retention and expansion.

Cautions

- **Scheduling automation:** Gong does not offer native scheduling automation. Meeting coordination is supported only through integrations with scheduling vendors, which may limit flexibility for teams requiring embedded scheduling workflows or advanced calendar logic. This may introduce friction for sellers who need to coordinate meetings directly from within deal or account views.
- **Advanced sales forecasting:** Customers seeking advanced forecast hierarchies may find limitations in Gong's forecasting capabilities. Customers needing custom hierarchies, roll-ups for cross-functional or overlay sales teams, multiowner deals, or alternate business models may face configuration complexity. Gong lacks some configurability and scenario modeling features found in more mature RAO forecasting modules.
- **Pricing:** Gong's premium list pricing is expensive relative to peers. Customers facing budget constraints may find Gong's pricing creates friction in the RAO buying process, especially when IT or procurement prioritize cost over feature depth. Modular pricing includes separate fees for core seats, platform access and application add-ons.

HubSpot

HubSpot is a Niche Player in this Magic Quadrant. Its Sales Hub product is part of a unified customer platform and is used globally, with concentrations in North America and EMEA. It primarily serves small and midsize businesses. Recent investments include the acquisition of Frame AI and Cacheflow, and the launch of Breeze (an AI architecture that supports agentic workflows and contextual intelligence across structured and unstructured data).

Strengths

- **Product innovation:** HubSpot restructured its platform architecture to support agentic AI through Breeze, which integrates structured CRM data, unstructured communications, and external sources into a unified context layer. This enables AI agents to execute autonomous actions such as prospecting, meeting prep and deal follow-up. The platform's embedded AI capabilities operate with minimal configuration, supporting real-time guidance and contextual recommendations.

- **Vendor growth:** HubSpot has demonstrated consistent and strong year-over-year growth in both customer count and revenue across its Sales Hub tiers. It continues to expand its global footprint and partner ecosystem while maintaining high levels of product adoption and usage across its customer base.
- **Customer experience:** Customers report rapid time-to-value and high satisfaction with Sales Hub's usability and embedded AI features. The platform's intuitive design and unified architecture contribute to strong adoption rates, particularly among small and midsize businesses. HubSpot's onboarding options, partner ecosystem and HubSpot Academy resources support ongoing customer success.

Cautions

- **Sales skills coaching:** Sales Hub provides limited functionality for structured coaching workflows; there is no dedicated interface for coaching based on performance metrics or engagement effectiveness. Buyers seeking robust coaching capabilities may need to supplement with third-party tools.
- **Buyer intelligence:** AI-powered buyer-level health scoring is not available in Sales Hub. AI health scores are calculated only at the account level. Buyer-level insights depend on signals captured through Breeze agents and integration with Marketing Hub, which may require additional configuration or licensing. Organizations seeking to monitor individual stakeholder engagement and risk within complex deals may need to implement additional tools or workflows to achieve contact-level visibility.
- **Industry strategy:** HubSpot's industry-specific implementation partnerships focus primarily on its CRM and broader platform. Sales Hub does not offer preconfigured vertical solutions. Buyers in regulated or specialized industries should evaluate whether HubSpot's extensibility and partner ecosystem meet their needs.

Oracle

Oracle is a Visionary in this Magic Quadrant. Its Oracle Sales product and related Fusion Cloud Applications are used globally. Customers span the large enterprise and upper midmarket tiers, particularly in high tech, manufacturing, financial services, communications and healthcare. Its roadmap emphasizes agentic AI (including an agent marketplace, bring-your-own LLM support, multimodal capabilities and incentive-aware orchestration) as well as forecast-aware guided selling and AI-augmented coaching.

Strengths

- **AI-guided actions:** Oracle uses a unified revenue data model that integrates ERP, CPQ and back-office signals with front-office engagement data. This interoperability enables highly contextual next best actions. The ability to combine operational and commercial data for prescriptive guidance provides differentiating precision in product-level orchestration.
- **AI sales assistant:** Oracle embeds its AI Agent Studio directly into the seller workflow across web, mobile and Microsoft Outlook. This allows sellers to interact with conversational AI for research, content generation and task execution without leaving their primary workspace, reducing friction and accelerating adoption compared to bolt-on assistants.
- **Integrated product strategy:** Oracle's RAO capabilities are natively integrated with collaboration tools such as Microsoft Teams and Slack, enabling deal teams to coordinate actions and share context without switching systems. Aligning marketing, sales and operations on a single platform supports matrixed go-to-market motions, thus reducing silos and improving execution speed.

Cautions

- **Product packaging:** Oracle's RAO functionality is embedded within the broader Fusion Cloud Applications Suite. Clients evaluating Oracle for RAO should consider the implications of adopting a multiapplication platform, which may require enterprise alignment beyond the sales organization.
- **Pricing complexity:** Implementing a full RAO solution with Oracle requires purchasing additional components such as Oracle Unity CDP, Oracle CPQ, and Oracle Account and Contact Enrichment. Pricing is based on multiple metrics (e.g., hosted named users, profiles, sessions), which can increase the total cost of ownership as adoption expands across marketing and sales. Buyers should model scenarios carefully to avoid underestimating costs.
- **Platform complexity:** Administration can be complex due to the breadth of Oracle's Fusion platform. Organizations without strong internal governance or implementation partners may face longer deployment timelines and hidden costs related to customization and integration.

Outreach

Outreach is a Leader in this Magic Quadrant. Its AI Revenue Workflow Platform has customers in North America, Western EMEA and Asia/Pacific (including Japan), and within the midmarket and enterprise tiers across financial services, telecommunications, manufacturing and high tech. Its roadmap emphasizes AI agents for engagement, expansion of the AI sales assistant, deeper interoperability with a signal ecosystem, and vertical-specific compliance (e.g., healthcare, financial services).

Strengths

- **Product strategy:** Outreach's integration and extensibility model supports enterprise interoperability (e.g., CRM, collaboration tools). Additionally, a self-service developer portal and marketplace allow customers and partners to build, test, and publish applications and custom objects. Product direction highlights agent interoperability and the connection of first- and third-party data to ground agentic workflows, and the roadmap centers on AI agents for engagement.
- **Account intelligence:** Sellers can assemble and configure AI-generated research tiles that synthesize signals from web sources, past conversations, CRM, enrichment providers and enterprise data. Relationship mapping supports drag-and-drop buying group visualizations and role designations, with account-level engagement and custom-made intent indicators. This helps surface where to engage, with whom, and why.
- **Customer value realization:** The customer experience is supported by ongoing success services. Customers report tangible productivity gains and measurable value following implementation. They also report achieving core RAO outcomes such as improved pipeline generation discipline and the reallocation of seller time from administration to selling.

Cautions

- **Mobile app limitations:** The mobile experience is limited to executing queued tasks (e.g., calls, emails) and reviewing deals. Outreach does not yet provide an AI sales assistant experience on mobile, which limits in-the-moment research and AI-grounded Q&A when users are away from their desktops.
- **AI-guided actions usability:** Next best actions are often lower-level tasks (e.g., make a call, send an email, update account or deal records), and are operationalized as project-style task lists derived from sequencing and deal activity. Customers will need to

educate their sellers on how to primarily work out of sequence tasks, requiring digital dexterity. Prioritizing next best actions requires sellers to navigate multiple task views and filters to determine what matters most in a given operating rhythm.

- **Programmable action orchestration:** The available seller action library is best used for sequence-oriented steps and is less suited to more sophisticated or complex sales motions. Additionally, workflow creation relies on menu-driven configuration rather than a visual builder, and views cannot be natively reframed to a management operating rhythm, making it essential for users to choose the right view.

People.ai

People.ai is a Visionary in this Magic Quadrant. Its product, People.ai, is used primarily by enterprise customers in North America, with additional presence in EMEA and Asia/Pacific. Typical industries include technology, manufacturing and telecommunications. Its roadmap includes expanding its AI agent capabilities, automating relationship mapping, and integrating its data layer into third-party AI applications through its Model Context Protocol (MCP) framework.

Strengths

- **Multisource buyer intelligence:** People.ai synthesizes buyer engagement across email, meetings, and call transcripts to generate AI-led insights on deal health, risk identification, stakeholder influence and next best actions. Its ability to enrich contact data and dynamically map buying groups enables sellers to identify economic buyers and champions without manual input, supporting more targeted and personalized outreach.
- **Product innovation:** People.ai has rearchitected its platform to operate independently of CRM data quality, ingesting and enriching first-party signals from across the enterprise. Its platform is built on a graph-based data architecture, which enables dynamic relationship mapping and contextual linking of buyer, seller and activity data. This structure supports flexible modeling of stakeholder maps. The roadmap includes an MCP framework, which will enable agentic workflows with external AI systems such as Microsoft Copilot and Claude that combine People.ai data, productivity suites and third-party signals.
- **Workflow automation:** Responses to People.ai's new customer survey indicate high satisfaction with embedded workflows and sales task automation. Customers, especially those managing complex accounts, also expressed appreciation for the platform's ability

to surface custom-made coaching insights (e.g., the number of deals adhering to a qualitative selling methodology), automate scorecards, and generate meeting prep from real-time engagement data.

Cautions

- **Execution model:** Prospective customers should consider People.ai's limited channel presence and pricing structure. The vendor's direct sales approach and per-user pricing may not be suitable for buyers seeking broader ecosystem support or flexible consumption models.
- **Multichannel buyer engagement:** People.ai does not support direct buyer interaction across multiple channels from a single interface. Organizations prioritizing omnichannel engagement capabilities may need to supplement the platform with other tools.
- **Scheduling automation:** The platform does not offer native scheduling automation features. Buyers requiring integrated meeting coordination or calendar management should assess whether third-party integrations are sufficient to meet their workflow needs.

Revenue Grid

Revenue Grid is a Niche Player in this Magic Quadrant. Adoption is concentrated in North America, with deployments in EMEA and an emerging presence in Asia/Pacific. Customers span the midmarket and enterprise tiers, typically within the technology, financial services, manufacturing and life sciences sectors. Its roadmap focuses on AI-native capabilities, including a proactive assistant, CRM hygiene automation and relationship intelligence, with a stated emphasis on agentic execution and interoperability.

Strengths

- **Knowledge base persistence:** Revenue Grid uses a semantic knowledge architecture to transform emails, meeting transcripts, and collaboration messages into structured insights that inform deal strategy and AI-guided actions. Its approach to grounding AI recommendations in verifiable facts supports explainability and trust in AI-driven workflows. Knowledge persistence across accounts and opportunities enables consistent reasoning for account planning, meeting preparation, pipeline reviews and coaching.
- **Integrated seller execution:** The platform integrates into sellers' daily tools, reducing application switching and improving adoption. Structured onboarding, proactive success

management and tailored enablement programs contribute to positive customer outcomes and sustained engagement.

- **Product investment:** Revenue Grid demonstrates consistent growth in its customer base, supported by continued investment in AI-native capabilities. Its focus on evolving the platform toward proactive and autonomous execution signals long-term commitment to the RAO market.

Cautions

- **Sales forecasting:** Revenue Grid does not support custom forecast hierarchies or multiple business models. Organizations with complex forecasting requirements, including consumption-based forecasting, should plan to utilize native SFA forecasting or integrate third-party solutions.
- **Programmable action orchestration:** Revenue Grid offers limited low-code orchestration for AI agents and workflow automation. Buyers seeking extensive customization, granular policy controls and governance for autonomous workflows should assess the need for additional tools or integration support.
- **Buyer intelligence:** Revenue Grid's solution lacks robust contact-level intent scoring and analysis. Organizations that prioritize granular contact-level intent signals should plan to identify external data sources and validate how those signals will be normalized, surfaced in action queues and measured for impact.

Revenue.io

Revenue.io is a Niche Player in this Magic Quadrant. Its customers are primarily in North America, with some in Western EMEA and Asia/Pacific. Its customers range from small and midsize businesses to large enterprises, typically in technology, financial services, healthcare, manufacturing/construction, professional services, and education. Revenue.io's product strategy is exclusively built around the Salesforce ecosystem. Its roadmap emphasizes its AI-guided selling, AI sales assistant, generative call scorecards, and conversation intelligence; it is also investing in Salesforce-centric data interoperability and more configurable AI governance.

Strengths

- **AI sales assistant:** Revenue.io enables sellers and managers to query deal/account/conversation intelligence that is grounded in a configurable knowledge

base (e.g., playbooks, messaging, competitive notes). This function is accessible in Salesforce or the Revenue.io web and mobile app, and its guided-prompt UX helps different sales roles brainstorm deal strategies and compose contextual messaging.

- **Real-time guided selling:** Revenue.io's platform provides prompts during virtual calls and web meetings to cue behaviors and next steps. Its guidance can align with sales methodologies, objection handling and compliance requirements. Admins can configure checklists by meeting type, customer and role, and connect context-aware guidance to call scorecards for postcall coaching.
- **Context-aware recommendations:** Revenue.io's knowledge architecture ingests documents (e.g., PDFs, presentation decks) and links the content to interaction data so the assistant can return specific, context-aware recommendations for GTM team members. This feature improves the precision of coaching feedback, follow-up summaries and message composition.

Cautions

- **Sales forecasting:** Forecasting is delivered primarily through managed dashboards inside Salesforce. Customers using Revenue.io that also want advanced forecasting logic, support for complex roll-ups and RAO-specific insights would need to configure these in Salesforce. This creates a fragmented experience to view forecasts, adding friction and reducing usability for customers desiring a single RAO system.
- **Pipeline analytics:** Pipeline analytics are likewise delivered mainly through managed Salesforce dashboards, requiring customers to rely on Salesforce dashboards for multiteam or period-over-period conversion analysis. Revenue.io's at-a-glance roll-ups of team pipelines with associated risks and trend snapshots are less prescriptive than other vendors.
- **Geographic strategy/presence:** Its product supports multiple languages and complies with country-specific call recording regulations, but Revenue.io has limited region-specific partnerships and delivery ecosystems. Organizations with distributed sales teams outside North America may need additional internal resources or third-party services to support regional rollout and change management.

Salesforce

Salesforce is a Visionary in this Magic Quadrant. Its Agentforce Sales product is used globally, with customers ranging from small and midsize businesses to large enterprises in multiple industries including financial services, healthcare, manufacturing and communications. Investments include agentic AI, expanded reasoning capabilities, voice interfaces and semantic analytics. The roadmap emphasizes generated insights and intelligence, unified seller experiences, autonomous workflows, and deeper integration with partner ecosystems.

Strengths

- **AI sales assistant:** Salesforce offers configurable flows, prompts, and agent actions that can be embedded across multiple surfaces, including Slack, CRM and browser extensions. It supports both point-and-click and conversational UX, enabling sellers to query records, generate collateral and execute tasks in context. Administrators can create reusable templates grounded in CRM data, supporting personalized and brand-compliant communications, and configure Agentforce agents to proactively interact with sellers.
- **Sales skills coaching:** Salesforce's seller coaching supports role-play simulations and AI-generated feedback, and proactive coaching workflows triggered by sales events. Sellers receive scorecards based on conversation analysis, with explainable insights tied to deal context and activity signals. Managers can review coaching alerts, inspect transcripts and leave feedback directly in the CRM or Slack, enabling structured and scalable coaching.
- **Product strategy:** Agentforce Sales is built on Salesforce's unified platform with deep integration across its other products and third-party ecosystems. Data 360 supports zero-copy data access from lakehouses like Snowflake and Databricks, and includes semantic modeling for AI readiness. Strategic partnerships with AWS, Google, and OpenAI extend agentic capabilities, while AppExchange and AgentExchange provide access to prebuilt agents, connectors, and vertical solutions.

Cautions

- **Premium pricing:** Salesforce's RAO capabilities are offered in their Unlimited and Agentforce 1 Sales editions. While all editions include capabilities such as Data 360, Agentforce and Slack, some customers may need to supplement their RAO solution with Flex Credits.
- **Ease of use:** Users have shared that Salesforce's RAO capabilities can be complex to navigate and administer. Setting up agents, orchestrations, and semantic models requires

familiarity with Salesforce's metadata framework and automation tools. Buyers should plan for enablement and governance to ensure adoption and consistency.

- **Mobile app limitations:** Salesforce's AI sales assistant is not fully available in the mobile interface. Sellers working in field environments may experience limitations in accessing conversational AI or executing agentic workflows.

Salesloft

Salesloft is a Visionary in this Magic Quadrant. The Salesloft Platform is used in North America, EMEA and Asia/Pacific, with customers ranging from small and midsize businesses to large enterprises, typically in the technology, manufacturing and professional services industries. Recent investments focused on expanding Rhythm's orchestration capabilities, enhancing AI-guided coaching, and improving mobile accessibility for sellers.

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Strengths

- **Signal orchestration:** Salesloft's Rhythm capability enables sellers to act on prioritized signals across accounts and buyers. It integrates multiple data sources to generate next best actions and allows administrators to tailor workflows to align with business operating rhythms. Its ability to suggest time-sensitive actions and coordinate across seller workflows distinguishes it from more static, queue-based systems.
- **Ease of use:** Salesloft's interface supports consistent workflows across web, mobile, and browser extension interfaces. Sellers can execute prospecting, engagement and follow-up tasks without switching tools, and the platform's guided workflows reduce cognitive load. The user experience is optimized for quick action and minimal friction.
- **AI-guided manager coaching:** Salesloft gives frontline managers curated coaching queues with call and email reviews, sentiment analysis and deal-scoring insights. Managers can access relevant moments and generate coaching recommendations with explainability, which supports scalable, data-driven coaching.

Cautions

- **Sales forecasting:** Salesloft's AI-driven forecast predictions are based on a weighted pipeline and do not factor in deal win probability, creating the potential for forecasts that over- or under-represent pipeline risk. This separation between win rates and forecasting logic may limit visibility into true deal health for customers with multiple forecasting dimensions (e.g., product, overlay).
- **Vertical/industry strategy:** Salesloft does not offer industry-specific configurations or content. Prospective customers in regulated or specialized industries may need to customize workflows or rely on partners for vertical alignment. Additionally, the partner ecosystem includes limited industry-specific providers, which may constrain deployment speed in niche sectors.
- **Enterprise-level data interoperability:** Salesloft requires a separate iPaaS subscription to integrate with enterprise data warehouses. Clients with complex data architectures seeking to connect Salesloft with third-party data warehouses should plan for additional cost and implementation effort. This may increase complexity for organizations aiming to unify GTM workflows.

ZoomInfo

ZoomInfo is a Visionary in this Magic Quadrant. Its product is used globally, deployed across North America, Europe, Asia/Pacific and Latin America. Customers range from small and midsize businesses to large enterprises, typically in financial services, healthcare, technology, manufacturing and professional services. It is investing in GTM Studio, ZoomInfo Copilot, an action hub for frontline prioritization, AI-guided coaching, and a data marketplace to expand vertical datasets, agents and APIs.

Strengths

- **Data interoperability:** ZoomInfo offers a unified, enriched commercial dataset that customers can blend with first-party CRM, MAP and data-warehouse records. It supports “bring-your-own-data” patterns, partner datasets and custom signals, enabling teams to stack and normalize multiple intent and engagement sources for signal hunting and downstream activation.
- **AI sales assistant:** ZoomInfo Copilot converts company, contact, intent, and engagement signals into actionable seller guidance. It produces shareable artifacts (e.g., account plans, meeting prep summaries) and can be invoked where sellers work, reducing the

effort of going from insight to outreach. ZoomInfo's data foundation improves targeting precision and reduces manual research time.

- **Account & buyer intelligence:** ZoomInfo's GTM Studio curates account-level "plays," buying group definitions, and custom signals that can be routed to ZoomInfo Copilot and frontline users. Users can assemble audiences, enrich records, and push context into seller workflows without building custom-made data pipelines.

Cautions

- **Sales forecasting:** ZoomInfo does not provide a dedicated forecasting module with hierarchical submissions and weighted roll-ups. Probability and momentum indicators are accessed via workbooks and AI-generated summaries. Forecast governance is also limited. Organizations that need structured forecasting cadences, audit trails, and manager roll-ups would need to retain native-SFA forecasting or add a specialized tool.
- **AI-guided actions:** Guided actions are fragmented across ZoomInfo Copilot, GTM Studio, and Chorus; sellers and managers must switch contexts to move from call insights to action queues. Organizations seeking a single, continuous workflow from signal detection through guided execution should validate handoffs, notification paths, and action logging across these surfaces.
- **Scheduling automation:** ZoomInfo's RAO portfolio does not include native scheduling automation. Meeting coordination relies on external email/calendar tools or adjacent products, which can add steps between outreach, qualification and booking. Teams that depend on automated scheduler workflows should plan to integrate a scheduling tool or confirm partner options during evaluation.

Inclusion and Exclusion Criteria

To qualify for inclusion in this Critical Capabilities document, vendors must meet the following criteria:

- General availability: All of the following criteria must be met. Products or services evaluated must be generally available.
 - General availability (GA) is defined as something a vendor's clients have in a production environment rather than something they are testing or evaluating.

- Product or Service Capability: The product or service must meet the market definition by offering seven of eight critical capabilities and four of seven common capabilities.
 - Critical capabilities: advanced activity intelligence, AI-guided actions, AI sales assistant, deal scoring, programmable action orchestration, pipeline analytics, data interoperability, knowledge base
 - Common capabilities: multichannel buyer engagement, sales skills coaching, account intelligence, buyer intelligence, sales forecasting, scheduling automation, mobile app
- Revenue and Customer Growth: Vendors must meet one of the following conditions to be included.
 - At least \$50 million calendar year 2024 (estimate) license revenue.
 - At least \$25 million calendar year 2024 (estimate) license revenue and 25 new customers (logos) when compared to calendar year 2023.
 - At least \$10 million calendar year 2024 (estimate) perpetual license revenue and 50 new customers (logos) when compared to calendar year 2023.
- Customer Interest: Gartner builds a customer interest indicator (CII) score based on these weighted factors:
 - Inquiry volume 15%
 - Social media followers 10%
 - Gartner search 15%
 - Google Trends 30%
 - web traffic analysis 30%

Vendors must achieve a CII of 45 or greater to be included.

Evaluation Criteria

Ability to Execute

Product/Service: The capabilities, features and overall quality of the core goods and services that compete in or serve the defined market. We specifically looked for: (1) capabilities aligned to customer needs; (2) support for specific customer use cases; and (3) competitive differentiation.

Overall Viability: The organization's overall financial health, as well as the financial and practical success of the relevant business unit. This includes the likelihood that the organization can continue to offer and invest in the product, as well as the product's position in the organization's portfolio. We specifically looked for: (1) revenue growth; (2) customer retention; and (3) customer growth.

Sales Execution/Pricing: The organization's capabilities in all presales activities and the structures that support these activities. This includes deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel. We specifically looked for: (1) product pricing; (2) geographic mix; and (3) customer lifetime value.

Market Responsiveness and Track Record: The ability to respond, change direction, remain flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This includes the provider's track record of responding to changing market demands. We specifically looked for: (1) track record of product releases/updates; (2) responsiveness to customer needs; and (3) customizations.

Marketing Execution: The ability to deliver clear, high-quality, creative and effective messaging via publicity, promotional activity, thought leadership, social media, referrals and sales activities. This includes the organization's ability to influence the market, promote the brand, increase product awareness and establish a positive customer reputation. We specifically looked for: (1) tailoring of messaging; (2) search interest, web traffic; and (3) social media presence.

Customer Experience: The degree to which a vendor's products, services and programs enable customers to achieve their desired results. This includes the quality of supplier/buyer interactions, technical or account support, as well as ancillary tools, customer support programs, availability of user groups and service-level agreements. We specifically looked for: (1) satisfaction with capabilities; (2) satisfaction with the purchase process; and (3) customer return on investment.

Operations: The ability of the organization to meet its goals and commitments. This includes the quality of its organizational structure, skills, experience, programs and systems that enable the organization to operate effectively and efficiently. We specifically looked for: (1) global and regional delivery capabilities; (2) vendor headcount and office growth; and (3) viability of the peer user community.

Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Low
Customer Experience	High
Operations	Low

Source: Gartner (December 2025)

Completeness of Vision

Market Understanding: The ability to understand customer needs and translate that understanding into products and services. Vendors with a clear vision of the market listen to and understand customer demands, and they can shape or enhance market changes with their vision. We specifically looked for: (1) market knowledge and awareness; (2) unique point of view on customer challenges; and (3) specific market-related innovation.

Marketing Strategy: The ability to clearly communicate differentiated messaging, internally and externally through social media, advertising, customer programs and positioning statements. We specifically looked for: (1) go-to-market approach; (2) clarity and consistency of messaging; and (3) product/service bundling.

Sales Strategy: The ability to create a sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service and communication. This includes partnerships that extend the scope and depth of a provider's market reach, expertise, technologies, services and their customer base. We specifically looked for: (1) channel strategy; (2) partner network size; and (3) pricing strategy.

Offering (Product) Strategy: The ability to approach product development and delivery in a way that meets current and future requirements, emphasizing market differentiation, functionality, methodology and features. We specifically looked for: (1) partner and developer ecosystem; (2) focus on data interoperability; and (3) product roadmap quality.

Business Model: The design, logic and execution of the organization's business model. We specifically looked for: (1) long-term customer relationships; (2) M&A strategies; and (3) key partnerships.

Vertical/Industry Strategy: The ability to strategically direct resources (sales, product, development), skills and products to meet the specific needs of verticals and market segments. We specifically looked for: (1) vertical-specific product offerings; (2) vertical-specific roadmap content; and (3) vertical-specific partnerships.

Innovation: Marshaling resources, expertise or capital for competitive advantage, investment, consolidation or defense against acquisition. We specifically looked for: (1) use of new and advanced technology; (2) evolution of data and application architecture; and (3) market-specific patents and trademarks.

Geographic Strategy: The ability to direct resources, skills and offerings to meet the specific needs of regions outside the provider's home region, either directly or through partners, channels and subsidiaries. We specifically looked for: (1) clear and consistent region focus; (2) language support; and (3) region-specific partnerships.

Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	Medium
Marketing Strategy	Low
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	Low
Vertical/Industry Strategy	Medium
Innovation	Medium
Geographic Strategy	Low

Source: Gartner (December 2025)

Quadrant Descriptions

Leaders

Leaders in the RAO market demonstrate a strong ability to execute their vision through products and services, consistently delivering solid business results, evident in their revenue and earnings. They have successfully deployed their RAO solutions with a significant or rapidly growing number of customers worldwide, often supporting a wide range of industries and large-scale deployments. These vendors consistently achieve above-average customer experience levels, product execution scores and sales execution scores.

Leaders provide thought leadership, actively guiding customers and prospects on how their RAO solutions fundamentally improve sales execution and sales processes. They achieve this by supporting data-driven decision making, capturing revenue signals into a normalized data

model that enables interoperability and execution of sales actions across multiple channels. They simplify AI partnership for sellers, addressing the skills gap, as sellers with high AI partnership skills are significantly more likely to meet quotas. They also champion the Seller Action Hub philosophy, designing technology to be frontline-centric while seamlessly integrating AI into sellers' workflows. Mandatory features like advanced activity intelligence, AI sales assistant, AI-guided actions, deal scoring, programmable action orchestration, pipeline analytics, data interoperability and knowledge base are all robustly supported by Leaders.

Challengers

Challengers in the RAO market offer proven solutions and services, and demonstrate stronger execution capabilities than Niche Players. They possess the scale necessary to compete globally; however, their ability to execute may not be equally strong across all geographies or market segments. These vendors often report strong customer satisfaction scores.

Challengers generally understand the evolving needs of sales organizations, recognizing how RAO applications address common challenges in traditional SFA, such as the administrative burden on sellers and the siloed nature of insights. They provide robust capabilities for logging and analyzing customer interactions automatically, offering AI-guided sales actions and helping sellers manage key sales tasks. They tend to have a solid technology vision for architecture and IT organizational considerations, particularly in data interoperability and programmable action orchestration, which allow admins to define workflows and configure AI. However, Challengers may not actively lead customers into entirely new functional areas with a strong vision for functionality, often focusing on refining existing, well-established RAO capabilities rather than pioneering novel AI-first approaches. While strong technically, they may not have fully won over top sales executives or application leaders within IT organizations regarding the full strategic, transformative potential of RAO.

Visionaries

Visionaries in the RAO market are ahead of most potential competitors in delivering innovative products and cutting-edge delivery models. They possess a keen ability to anticipate emerging and changing sales needs, actively moving the market into fresh areas with solutions that significantly improve sales execution. These vendors are likely to be

innovators in the application of composite AI and the development of AI sales agents that operate autonomously, transforming how sellers interact with technology. They focus on creating AI-ready commercial datasets by capturing revenue signals into normalized data models, enabling advanced AI and machine learning (ML) models to guide selling actions.

Visionaries have a strong potential to influence the future direction of the RAO market through their forward-thinking approaches, such as pioneering conversational UIs for sales or developing new ways to simplify AI partnership for sellers. They are instrumental in shaping the market's evolution from distinct sales engagement and revenue intelligence markets into a converged RAO solution. However, their strength lies more in their visionary approach and innovation, and they may be limited in terms of execution breadth or a long-standing track record compared to Leaders. Their advanced solutions may be cutting-edge, but may not yet have the widespread, large-scale deployments or consistent business results compared to more established players.

Niche Players

Niche Players in the RAO market offer products that provide RAO functionality, but may lack comprehensive components required across the entire RAO market. Some of these vendors may not consistently demonstrate the ability to manage high volumes of large-scale deployments across multiple geographies. Even if their core features are strong, they may lack strong business execution within the broader RAO market.

These vendors may offer complete portfolios that are highly specialized for specific industries or particular sets of sales use cases, such as acquiring new customers or coaching sales talent within a defined vertical. However, they often face challenges in supporting broader cross-industry requirements, such as complex forecasting or comprehensive pricing and quotation features. Niche Players may also exhibit an inconsistent implementation track record or lack the necessary capabilities to fully support the diverse requirements of large enterprises seeking a complete RAO solution that integrates across CRM, data lakehouses and third-party technologies. While they can provide excellent solutions for specific organizational needs or sales scenarios, their scope and scalability may be limited compared to other market quadrants.

Context

The RAO market is undergoing rapid evolution, driven by the need to overcome fragmented data and limited guidance in traditional sales processes that hinder seller productivity. This market focuses on leveraging AI to enhance sales efficiency by capturing revenue signals into a unified data model. This establishes an AI-ready commercial dataset that functions as a primary system for seller actions and a central source of truth for sales interactions. For GTM teams, RAO facilitates AI-guided decision making and orchestrates GTM activities across various channels. For leadership, it integrates AI into deal management, pipeline analytics and forecasting. The critical role of contextual awareness for AI is a key area of development, as systems without adequate context may generate inaccurate or hallucinated responses.

Client organizations evaluating RAO solutions often consider two primary approaches: purchasing add-on products through their existing SFA platform or selecting a specialized point solution. SFA vendors demonstrate strengths in providing integrated ecosystems and comprehensive industry-specific capabilities in their platforms. These offerings frequently emphasize unified data foundations and a connected GTM experience across sales, marketing and service functions. In contrast, point solutions often prioritize AI-guided selling, revenue cadences, and robust data integration to provide deep revenue context. Both types of solutions aim to transform unstructured data from customer interactions into usable intelligence, although the scope and depth of integration with a company's broader GTM strategy can vary. When choosing between these options, clients should assess a provider's ability to ensure data interoperability, deliver AI-driven context, and orchestrate workflows consistently across their enterprise architecture.

Sales operations leaders should prioritize developing a strong data strategy that ensures a complete and unbiased view of all customer interactions. This involves establishing a unified data model that captures and interprets both structured and unstructured revenue signals, enabling AI-powered insights for strategic decision making and proactive intervention. Prescriptive actions for sales operations include designing and deploying AI-guided actions that are specific and credible enough to benefit frontline sellers, as well as evaluating and selecting performance metrics to configure analytics for their teams. Leveraging RAO solutions to identify pipeline trends, conduct win/loss analyses, and customize analytical views will allow sales operations to provide strategic GTM input, optimize processes and ensure forecasting accuracy. Sales operations leaders should explore RAO platforms' use of specialized, autonomous AI agents to simplify revenue workflows and their ability to build custom, end-to-end processes within a solution. This will drive consistent execution at scale and foster a culture of insight-driven coaching.

Market Overview

The RAO market is emerging from the convergence of previously separate sales engagement and revenue intelligence markets. Over the past 18 months, vendors have significantly reoriented their offerings, demonstrating self-disruption by integrating AI capabilities throughout their platforms to deliver insights and actions to users.

This shift signals a critical opportunity for organizations to leverage RAO solutions to enhance their sales technology stack, moving toward AI-first sales organizations where complex data is made more intuitive for all revenue team members.

Use Cases and Growth Drivers

RAO solutions support a diverse array of use cases across the revenue organization:

- For frontline sellers, key applications include acquiring new customers, retaining existing accounts and expanding them.
- For sales leadership and operations teams, critical use cases involve managing pipeline and forecasting, and providing seller skills coaching.

The primary driver of growth in this market is the use of AI to increase revenue and enhance seller productivity, though approaches vary based on industry, segmentation and user profiles. Customers typically initiate their adoption of RAO technology by focusing on one or two core use cases, gradually expanding their engagement with a vendor's offerings over time.

Key dynamics influencing current buying patterns include the fundamental shift toward integrated AI capabilities offering real-time guidance and automation over siloed tools. It also includes a growing demand for transparent and explainable AI that unifies revenue context across disparate data sources. The expectation is that RAO's ability to actively guide and execute seller actions will continue to accelerate.

Vendor Trends

RAO vendors generally fall into two categories:

- SFA vendors that provide RAO capabilities generally offer more comprehensive options and deeper integration across a wider suite of applications, but their solutions may

require greater administrative effort and customization to align with specific organizational needs.

- RAO-first vendors are evolving to position themselves primarily as data platforms, consolidating diverse revenue signals into a normalized, AI-ready data model.

Vendors in this space take different approaches to how they handle sales data. Some focus on tracking every buyer interaction over time — like a timeline of emails, calls, and meetings — to help sellers respond in real time. Others build rich customer profiles by connecting data from multiple sources, giving sellers a full picture of who they're dealing with. A few prioritize a deep understanding of buyer intent using AI to interpret meaning from conversations and content. These differences shape how useful and actionable the insights are for sales teams.

A common challenge for customers is the existence of multiple RAO vendors within their tech stack, leading to a strong desire for consolidation of tools and data to streamline operations and enhance insights.

Vendor growth is fueled by the fact that sales data is scattered across too many tools. RAO platforms aim to give GTM teams a single, intelligent system that turns messy data into clear, actionable guidance. Customers often have one to two targeted use cases that kick off their purchase needs, which are directly influenced by their level of organizational complexity, unique GTM strategies and stage of AI maturity. RAO gives enterprises a ready-made way to use generative and agentic AI in sales — without incurring the cost and complexity of building it themselves.

⊕ Evaluation Criteria Definitions

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