Winter 2021

G2 Sales Engagement Software Report

groove

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G2 Sales Engagement Platform Rankings Overview

Winter 2021

Executive Summary

Every quarter, G2 publishes its rankings of the top sales engagement platforms based on verified user reviews. This report summarizes the Winter 2021 rankings that were released on November 24, 2020. You'll learn why Groove is leading the pack, as well as how the top providers are ranked across several criteria, including user satisfaction and G2's proprietary Relationship Index and Momentum Grid®.

Whether you're currently using a sales engagement platform or are looking to implement one, this guide will provide you with unique insights and third-party review data for making an informed decision.

About G2

G2, the world's leading business solution review platform, leverages 1M+ user reviews to drive better purchasing decisions. Business professionals, buyers, investors, and analysts use the site to compare and select the best software and services based on peer reviews and synthesized social data. Every month, more than four million people visit G2's site to gain unique insights.

About the Sales Engagement Software Category

G2 has strict criteria for the 49 solutions that it includes in its Sales Engagement Software category grid. Here is how G2 describes the category in greater detail:

Sales engagement platforms streamline the sales process through integrations with CRM systems, sales communication channels and tools, management of sales messaging and materials, and automation of tasks, messages and workflows. This software enables companies to combine their sales and marketing efforts to create personalized and automated sales journeys; these can include emails, calls, social posts, meetings, and text messages.

By standardizing both messaging and the overall sales experience, teams can report on the effectiveness of specific messaging and tactics while also reducing administrative tasks for sales and customer success representatives. Sales engagement software will integrate with existing sales solutions, such as a team's CRM platform, email software, email tracking software, outbound call tracking software, sales intelligence software or lead intelligence providers, and sales enablement software for collateral management, among others.

To qualify for inclusion in the Sales Engagement category, a product must:

- Be a sales-facing product meant for daily use by sales representatives

- Integrate sales communication channels (email, calls, social, etc.) within one cohesive platform

- Manage standardized sales content such as email templates, call scripts, presentations, social posts, and other marketing materials

- Automate multichannel communication sequences and workflows

- Provide analytics or insights into sales performance

G2 Grid Reports for Sales Engagement Platforms
Winter 2021
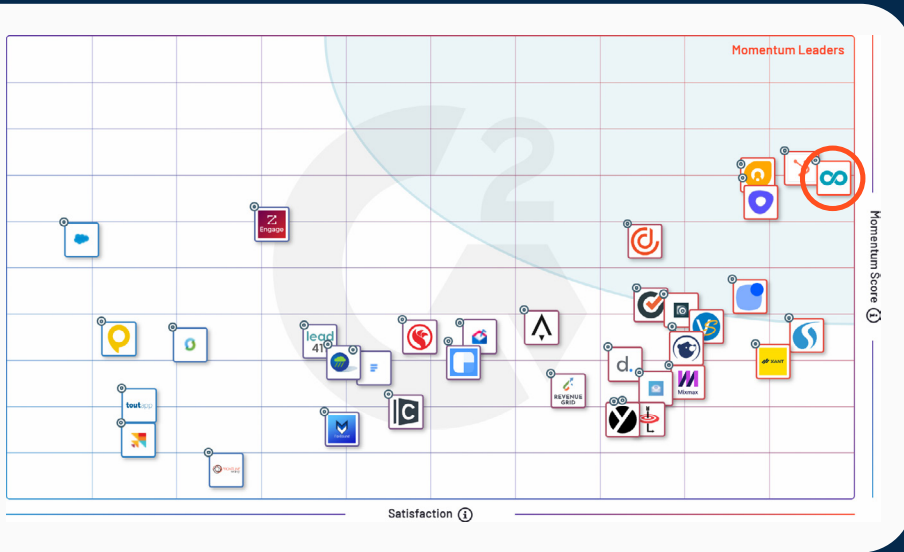
Sales Engagement Platforms Momentum Grid®

G2's Momentum Grid® highlights each product's Momentum score on the vertical axis and the product's Satisfaction score on the horizontal axis. These scores are based on G2's proprietary Satisfaction and Momentum algorithms. Products with a top 25% Momentum Grid® score are designated as Momentum Leaders in the shaded area of the report.

Sales Engagement Platforms Satisfaction & Market Presence Grid Report

In addition to Momentum, G2 also ranks sales engagement platforms by product and customer satisfaction (based on user reviews) and market presence (based on market share, seller size, and social impact) and placed into four categories.

G2 Sales Engagement Grid Quadrants

Contenters	Market Leaders
While Contenders have high market presence scores, their product satisfaction scores are below the category averages.	Market Leaders have the highest scores for both product satisfaction and market presence. **Groove is #1 in product and customer satisfaction.**
Niche	**High Performers**
Niche solutions have low market presence and product satisfaction scores as compared to the rest of the category.	While High Performers have high product satisfaction scores, they trail the rest of the category in market presence.

About the Top-Ranked Solution:

groove

★★★★★
4.7 out of 5 stars (1,150 reviews)

G2 Leader WINTER 2021

Groove has been named a Leader based on receiving a high product and customer Satisfaction score across 60 attributes spanning product and service satisfaction as well as Market Presence. Groove received the highest Satisfaction score among all of the products in the Sales Engagement Platforms category. 99% of users rated it 4 or 5 stars, 93% of users believe it is headed in the right direction, and users said they would be likely to recommend Groove at a rate of 95%.

Groove is the leading **sales engagement platform** for enterprises using Salesforce, specializing in ease-of-use, ease-of-administration, and cross-team collaboration. Built for the needs of full-cycle sellers, Groove automates non-sales activities so that pre- and post-sales reps can spend more time building relationships and generating revenue. On average, Groove gives revenue teams 20% of their time back to focus on higher-value activities. Groove's Salesforce native architecture ensures more accurate reporting and forecasting, lower compliance risk with global privacy laws, and streamlined administration.

Ownership	**HQ Location**	**Year Founded**	**Company Website**
Groove	San Francisco, CA	2014	www.groove.co

Satisfaction Ratings

Quality of Support — 95% — Avg. 92%

Ease of Use — 93% — Avg. 91%

Meets Requirements — 93% — Avg. 90%

Ease of Admin — 93% — Avg. 89%

Ease of Doing Business With — 97% — Avg. 93%

Ease of Setup — 93% — Avg. 89%

Email Tracking/Automation — 97% — Avg. 92%

CRM Integration — 96% — Avg. 90%

Task Management — 95% — Avg. 90%

Likely to Recommend — 95% — Avg. 91%

Product Going in Right Direction — 93% — Avg. 90%
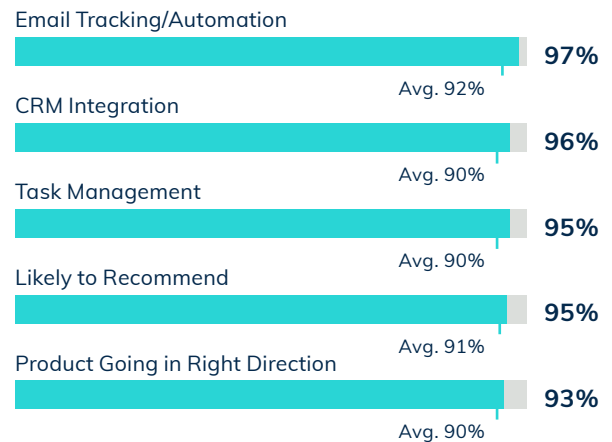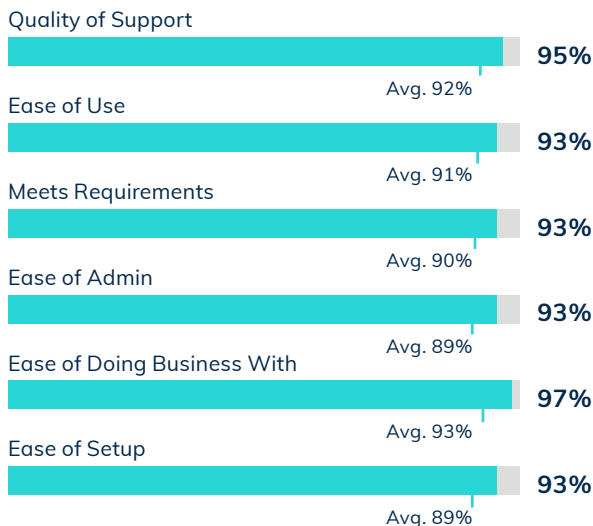
G2 Satisfaction Leader Rankings

Groove receives top Satisfaction Ratings when compared to other leading sales engagement platforms.

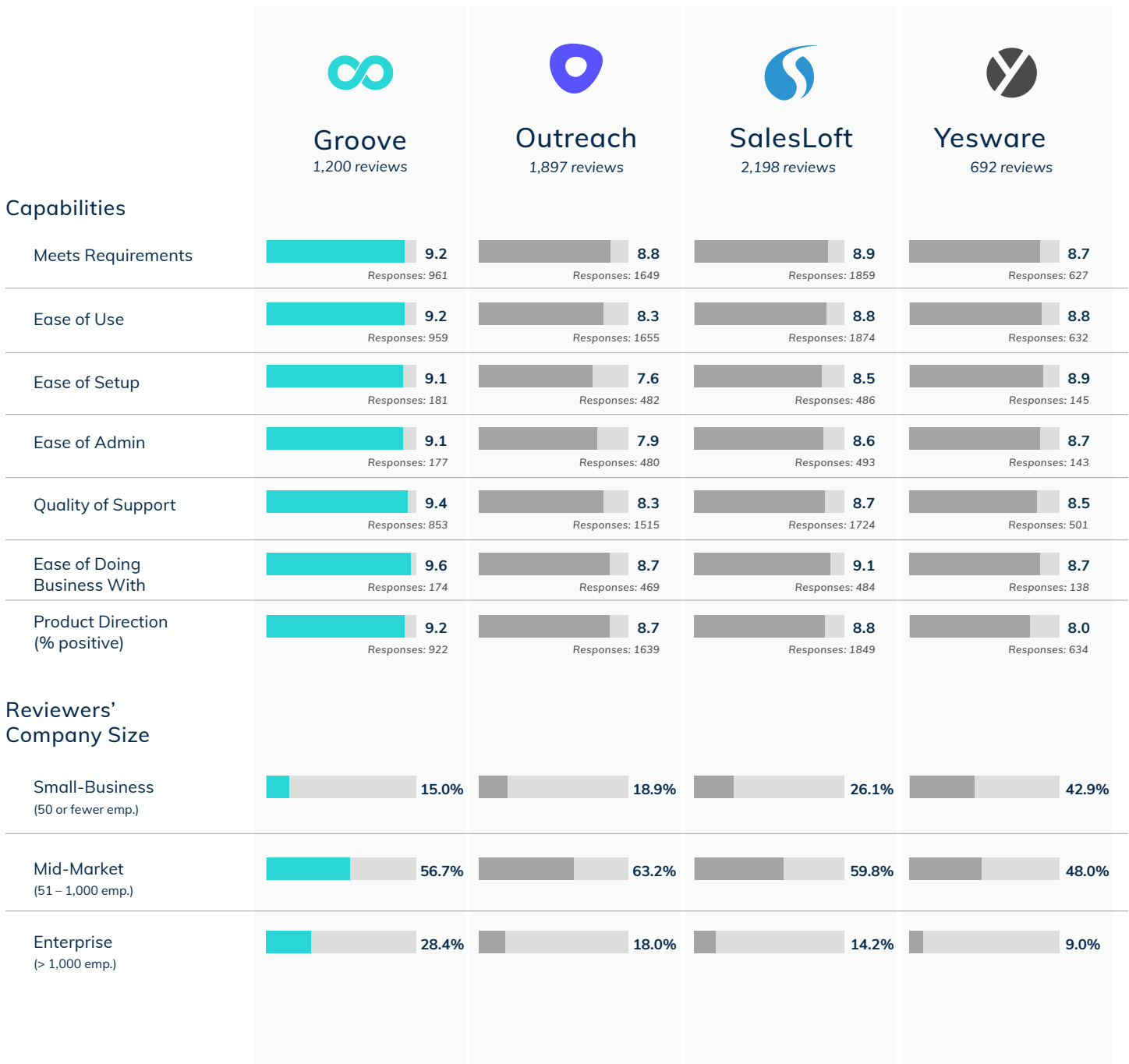| Satisfaction	Product Satisfaction by Category								NPS
	Likely to Recommend	Product Going in Right Direction?	Meets Requirements	Ease of Admin	Ease of Doing Business	Quality of Support	Ease of Setup	Ease of Use	Net Promoter
Groove	**95%**	**93%**	**93%**	**93%**	**97%**	**95%**	**93%**	**93%**	**85**
Outreach	87%	90%	89%	82%	89%	86%	80%	86%	56
SalesLoft	89%	90%	90%	88%	93%	89%	87%	90%	64
Yesware	88%	83%	89%	88%	88%	87%	89%	90%	60

"Groove is Life Changing!"

"I love ALL the capabilities of Groove. Everything I used to do was so time-consuming. Now that we use Groove, I have so much more time on my hands, because I am able to take the tedious task out of sending sales or promotional emails by using Groove Flows."

Taryn M., Account Manager, MOO

Ranking Top 4 Sales Engagement Platforms
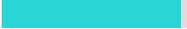## Capabilities and Reviewer's Company Size
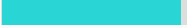
The tables over the next three pages outline how Groove compares to its top competitors across 25+ categories. Groove received the highest product ratings across all categories in G2's sales engagement platform rankings. While Groove's customer satisfaction scores were the highest in their category, Groove received exceptionally high marks for its ease of doing business with, quality of customer support, email tracking/automation and CRM integration.

	Groove 1,200 reviews	Outreach 1,897 reviews	SalesLoft 2,198 reviews	Yesware 692 reviews
Capabilities				
Meets Requirements	9.2 Responses: 961	8.8 Responses: 1649	8.9 Responses: 1859	8.7 Responses: 627
Ease of Use	9.2 Responses: 959	8.3 Responses: 1655	8.8 Responses: 1874	8.8 Responses: 632
Ease of Setup	9.1 Responses: 181	7.6 Responses: 482	8.5 Responses: 486	8.9 Responses: 145
Ease of Admin	9.1 Responses: 177	7.9 Responses: 480	8.6 Responses: 493	8.7 Responses: 143
Quality of Support	9.4 Responses: 853	8.3 Responses: 1515	8.7 Responses: 1724	8.5 Responses: 501
Ease of Doing Business With	9.6 Responses: 174	8.7 Responses: 469	9.1 Responses: 484	8.7 Responses: 138
Product Direction (% positive)	9.2 Responses: 922	8.7 Responses: 1639	8.8 Responses: 1849	8.0 Responses: 634
Reviewers' Company Size				
Small-Business (50 or fewer emp.)	15.0%	18.9%	26.1%	42.9%
Mid-Market (51 – 1,000 emp.)	56.7%	63.2%	59.8%	48.0%
Enterprise (> 1,000 emp.)	28.4%	18.0%	14.2%	9.0%

Ranking Top 4 Sales Engagement Platforms
Integrated Workflows and Analytics

Groove's support for integrated workflows across email, outbound calling, and SMS gives users the flexibility to engage contacts with coordinated and relevant communications. Unlike other sales engagement platforms that sync CRM data to internal databases, Groove's native integration with Salesforce eliminates sync errors and data latency.

Features	Groove	Outreach	SalesLoft	Yesware
Integrated Workflows				
Task Management	9.3 Responses: 352	8.8 Responses: 567	8.8 Responses: 729	7.9 Responses: 78
Email Tracking/ Automation	9.6 Responses: 469	9.1 Responses: 598	9.1 Responses: 804	9.2 Responses: 121
Calls and Voice	9.1 Responses: 270	8.5 Responses: 467	8.5 Responses: 708	*Feature not Available*
Other Outreach Options	9.2 Responses: 258	8.4 Responses: 453	8.3 Responses: 607	7.5 Responses: 49
CRM Integration	9.5 Responses: 433	8.5 Responses: 567	8.8 Responses: 784	8.6 Responses: 83
Analytics				
Open Rates	9.3 Responses: 589	8.9 Responses: 873	8.6 Responses: 1156	8.8 Responses: 297
Link Activity	9.3 Responses: 580	8.5 Responses: 829	8.5 Responses: 1117	8.5 Responses: 280
Attachment Activity	9.2 Responses: 531	*Feature not Available*	8.3 Responses: 966	8.4 Responses: 259

Ranking Top 4 Sales Engagement Platforms
Repeatability, Reportability, and Customization

Groove's integration with Google Workspace (formerly G Suite) and Microsoft Office 365 allows users to access all of Groove's features from within the applications that they use everyday. Groove's native Salesforce integration enables users to update custom fields and objects directly from their inbox. This approach ensures that Salesforce data is current and up-to-date, which improves sales communications and outcomes while helping to ensure accurate forecasting.

	Groove	Outreach	SalesLoft	Yesware
Repeatability & Reportability				
Content Management	9.2 Responses: 348	8.5 Responses: 483	8.7 Responses: 695	8.5 Responses: 80
Workflow Management	9.3 Responses: 398	8.7 Responses: 540	8.9 Responses: 761	8.4 Responses: 78
Workflow Performance	9.3 Responses: 390	8.6 Responses: 527	8.8 Responses: 754	8.5 Responses: 79
Sales Coaching & Insights	9.0 Responses: 243	8.1 Responses: 414	8.4 Responses: 598	*Feature not Available*
Customizations				
Email Platform Integration	9.4 Responses: 638	8.9 Responses: 848	8.9 Responses: 11t23	8.7 Responses: 260
Email Scheduling	9.5 Responses: 610	8.9 Responses: 871	9.1 Responses: 1103	8.7 Responses: 265
Notifications	9.4 Responses: 613	8.5 Responses: 866	8.8 Responses: 1111	8.7 Responses: 284
Email Categorization	9.3 Responses: 475	8.5 Responses: 581	8.5 Responses: 948t	8.8 Responses: 107
Templates	9.4 Responses: 631	9.1 Responses: 881	9.0 Responses: 1120	8.5 Responses: 271

Verified User Reviews from G2

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"Groove Is a Great Platform for Our Org!"

"Groove will make your day-to-day so much easier. It's user friendly and a huge time saver for sales reps who don't have the bandwidth to ensure all the administrative work with activities is done in Salesforce. We are very impressed with the support and dependability Groove provides."

John W., Senior Salesforce Administrator, Kaplan

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"Groove is a Great Platform"

"I love that Groove lets you do your work based on processes and flows. Other platforms just show you all upcoming tasks without sequences, which results in extremely irregular coverage for your day. Groove is simple to use, has real-time email updates, real-time reporting, and great support."

Sumant Tapale, Relationship Manager, IDFC First Bank

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"Amazing!"

"I love Groove's automation. I have templates for general prospecting emails that I otherwise would have to type out and take up a decent amount of my day. I've told others in sales about it and suggested they talk to the necessary departments to get this into their orgs."

Devonte J., Account Manager, 8x8

 WEALTHENGINE™

WealthEngine Improves Sales Tracking and Efficiency by 60%

WealthEngine's proprietary wealth intelligence services help more than 3,000 organizations optimize engagement with ideal prospects.

WealthEngine's own sales team had been relying on SalesLoft for sales engagement, but issues with activity tracking, usability, and connectivity with Salesforce led them to look for a platform that would better integrate with its techstack and drive higher adoption among account executives. WealthEngine quickly narrowed the field to Groove as the only enterprise provider offering native Salesforce integration and a user-friendly interface that could be easily customized for its SDRs, AEs, Renewal, and Finance teams.

Since switching to Groove, WealthEngine has eliminated data sync errors with Salesforce, boosted activity tracking by 50%, achieved 100% adoption across teams, and increased the productivity by 60%. Learn more.

Big Wins

100% adoption among AE, SDR, and Renewal teams

50% increase in number of activities tracked

60% efficiency gain in managing renewals

80% of Renewal teams using Flows (60% higher than goal)

About WealthEngine

The industry's premier wealth intelligence SaaS provider, WealthEngine fuels wealth-aware campaigns to empower its clients to discover their next best prospect to drive growth. Fueled by its proprietary wealth and lifestyle signals, WealthEngine enables 3,000 marquee customers to measurably improve their personalization and effectiveness across fundraising, capital campaigns, marketing, segmentation and overall engagement with their audience.

Headquarters	Industry	Type
Bethesda, M	Financial Technology	B2B

wealthengine.com

Groove Sales Engagement Platform

Groove has ranked #1 in product and customer satisfaction across 49 Sales Engagement Software providers on G2 for over two years in a row. As the only sales engagement platform that was built specifically for full-cycle sellers, Groove's powerful and flexible platform is optimized for ease-of-use, advanced activity capture, and cross-team collaboration.

Key Capabilities

- Email and calendar syncing, online meeting scheduler, and custom data collection
- Automated multi-step communication flows and analytics
- Cross-team collaboration and best practice sharing
- Automatic dialing, SMS, call-logging, and voicemail drop
- Activity logging, call stats, account-based engagement
- Native Salesforce integration eliminates data latency and ensures accurate reporting

Ready to experience Groove for yourself?

REQUEST A DEMO

About Groove

Groove is the leading sales engagement platform for enterprises using Salesforce, specializing in ease-of-use, ease-of-administration, and cross-team collaboration. Built for the needs of full-cycle sellers, Groove automates non-sales activities so that pre- and post-sales reps can spend more time building relationships and generating revenue. On average, Groove gives revenue teams 20% of their time back to focus on higher-value activities. Groove's Salesforce-native architecture can be customized to align with industry-specific workflows while ensuring more accurate reporting and forecasting, lower compliance risk, and streamlined administration.

Over 50,000 account executive, sales development, and customer success representatives use Groove at some of the world's largest and fastest-growing companies, including Google, Uber, BBVA, and Capital One. Groove was named one of Inc. Magazine's Best Workplaces 2020 and is one of the 2020 Inc. 5000 fastest-growing privately held companies in the U.S. Groove also ranks #14 on the San Francisco Business Times' "fastest-growing private companies in the Bay Area in 2019." Founded in 2014, Groove is headquartered in San Francisco with offices in San Diego and Seattle. To learn more, visit groove.co.