



capioIT

Salesforce.com Global
Systems Integration and
Services Providers
Capture Share Report -
2020

FOCUS POINTS

- > Salesforce is the benchmark SaaS and Customer Experience platform. In 20 years, it has gone from upstart to benchmark. As quarterly financial results consistently highlight, it is still building momentum.
- > One of the most critical changes that capioIT observes when engaging with Salesforce customers is the question is not “If Salesforce” *but* “how Salesforce” is to be used within the organisation. It is the default platform for Customer Experience, and as highlighted the benchmark for SaaS. Alongside AWS, Google Cloud and Microsoft Azure, capioIT considers Salesforce to be one of the fundamental cloud-native platforms driving the future of enterprise technology and business outcomes.
- > Growth in the Salesforce platform is driven both internally and externally through the extensive partner and ISV ecosystem. Internally there has been organic and inorganic enhancements across the portfolio to enable it to move the broad customer experience for enterprise clients. In parallel with internal development, it has acquired as necessary, particularly from the ISV space, e.g. in 2019, Vlocity and MapAnything.
- > The depth of product breadth and functionality continues to increase. AI is driven organically through Einstein, app integration through the acquisition of Mulesoft. Salesforce 360 is the critical platform for integrating the Salesforce product set and the broader ecosystem. 360 is designed to deepen the customer experience and understanding. That is without even considering the industry and solution cloud investments.
- > From the System Integrator (SI) perspective, the Salesforce ecosystem is dynamic and competitive. From capioIT experience, Salesforce SI partners are enthused and keen to engage with the Salesforce Platform to drive customer outcomes. For some legacy platforms this is less clear.
- > There are some downsides to this success. The most successful Salesforce Integration Partners are the most dominant System’s Integrators. It wasn’t always this way. Appirio, Bluewolf and Cloud Sherpas we all leaders in the original Capture Share report before being acquired in recent years. Salesforce has a long tail SI and partner ecosystem but needs to support re-establishment of a portfolio mid-sized SI partners. Most are acquired once they reach a certain scale or proficiency. This mid-sized grouping is so critical for the development of specific customer solutions, industry expertise and skills.
- > Considering the skills perspective, one of the most decisive differentiation aspects for Salesforce is Trailhead. As a training capability for customers and partners alike, Trailhead is the benchmark across the technology ecosystem. This has been even more critical during the COVID and economic issues of 2020 and will be beyond this time frame.
- > Accenture has leadership in the market. It has been the clear leader in Salesforce for many years. However, more than ever, in 2020, the competition capability is improving and driving a high level of competitive engagement in the market. Deloitte and PwC are just behind Accenture in capability, and the leaders are filled out with IBM Bluewolf, Wipro Appirio, Infosys and Capgemini.

> capioIT included 14 vendors in the study. This is a slight increase in vendors from the previous research. Persistent Systems and Slalom was included this year, Fujitsu excluded.

HOW CAPIOIT MEASURES VENDOR CAPABILITY IN THE GLOBAL SALESFORCE.COM SYSTEMS INTEGRATION AND SERVICES PROVIDERS MARKETPLACE

A Capture Share report is the established methodology used by capioIT to rank providers in global and other geographic markets across a range of technology and business services sectors. The Capture Share report output is objective, market-based analysis of 17 key capabilities and attributes of selected services providers.

These attributes are focused in two key areas, Transform and Leverage. Transform in simple terms is the ability for a vendor to engage and create processes and stronger measurable business outcomes for clients. Leverage is focused on the ability to work in a broad integrated ecosystem and provide scale to the creation and measurement of client outcomes.

In order to integrity of the analysis and data, the individual attributes are weighted in percentage terms on the basis of the overall influence for the Transform and Leverage capabilities.

Clearly data and process integrity are a critical component of a report of this type. It is fundamental that the data be valid and untarnished. To help ensure this, all information for the measurement and assessment of these attributes comes from a range of sources to ensure a range of opinions. Sources of information include buyers of Salesforce services solutions globally, vendor briefings and meetings, media sources, the Salesforce ecosystem and specific end-user feedback from a range of customer sizes, use cases and attributes.

The following table defines each of the attributes. These tables also provide the weighting of each individual attribute in the analysis.

Leverage Attribute	Definition	Weighting
Customer Satisfaction	Customer Satisfaction sourced from customer discussions and Salesforce AppExchange etc.	20%
Solution Portfolio Depth	Depth of offerings across customer requirements for Salesforce.com	15%
Certified Salesforce Professionals	Dedicated Certified Salesforce professionals globally	15%
Country Strength	Depth, maturity and capability of country subsidiary	12%
Sales Team Strength	Quality, depth of sales team and engagement	8%
Delivery Partnerships	Partnerships to deliver to client requirements globally	10%
In Country Geographic Reach	Breadth of country based geographic capabilities	8%
Country localisation	Offerings designed for the local market	8%
Total		100%

Transform Attribute		Weighting
Internal R&D	Internal R&D focused on Salesforce related Services	10%
Leverage Salesforce R&D	Platform to leverage Partner Salesforce R&D	10%
Salesforce Ecosystem Partnership	Depth of partnerships in the Salesforce.com ecosystem	15%
Global Solution Development	Development of portfolio offerings that are global in scope and capability	5%
Industry Solution Development	Development of industry specific solutions for clients	15%
Country Solution Development	Strength and quality of client outcomes from engaging the provider	5%
Salesforce.com Platform Implementation	Investment in Salesforce.com platforms and related services	20%
Strength of Brand	Reputation and credibility of brand in the local and global marketplace	12%
Ability to influence external market	Strength of the provider to create market awareness and influence	8%
Total		100%

The following section highlights the leadership in each of the 17 attributes included in the report. The vendor/s next to the attribute represent the highest ranked vendor for that attribute. It highlights that for some factors, the leadership is spread across multiple

vendors, e.g. Leverage Salesforce R&D, whereas for other factors, such as Internal R&D, leadership rests with one vendor.

RANKING THE GLOBAL SALESFORCE.COM SYSTEMS INTEGRATION AND SERVICES PROVIDERS

The Salesforce services market has innovation, scale and momentum, driven by growth in the platform organically and through acquisition, and the increased reliance on the application by customers. As highlighted before. It has evolved dramatically from the initial domain of the start-up and agitators service providers to one dominated by the largest global consulting firms. This has occurred by and large through acquisitions, aligned with very strategic organic growth. Now in 2020, most SI's with mature and leading capabilities are placing the strategic importance for their Salesforce Platform investments on a similar pedestal to SAP and Microsoft. For many, if forced to choose, the Salesforce Platform easily is more strategically and financially important than Oracle, particularly as part of an As a Service platform and future opportunity perspective.

Consolidation now is much more pointed based on geography. There are limited mid-sized acquisition targets now, so the focus is on strategic offering or geographic providers, e.g., the recent acquisition of 4C by Wipro provides strength in Quote to Cash capabilities as well as geographic expansion in Europe. In a similar outcome, Infosys acquired Simplus with Quote to Cash capabilities in the US and broader Salesforce abilities in Australia

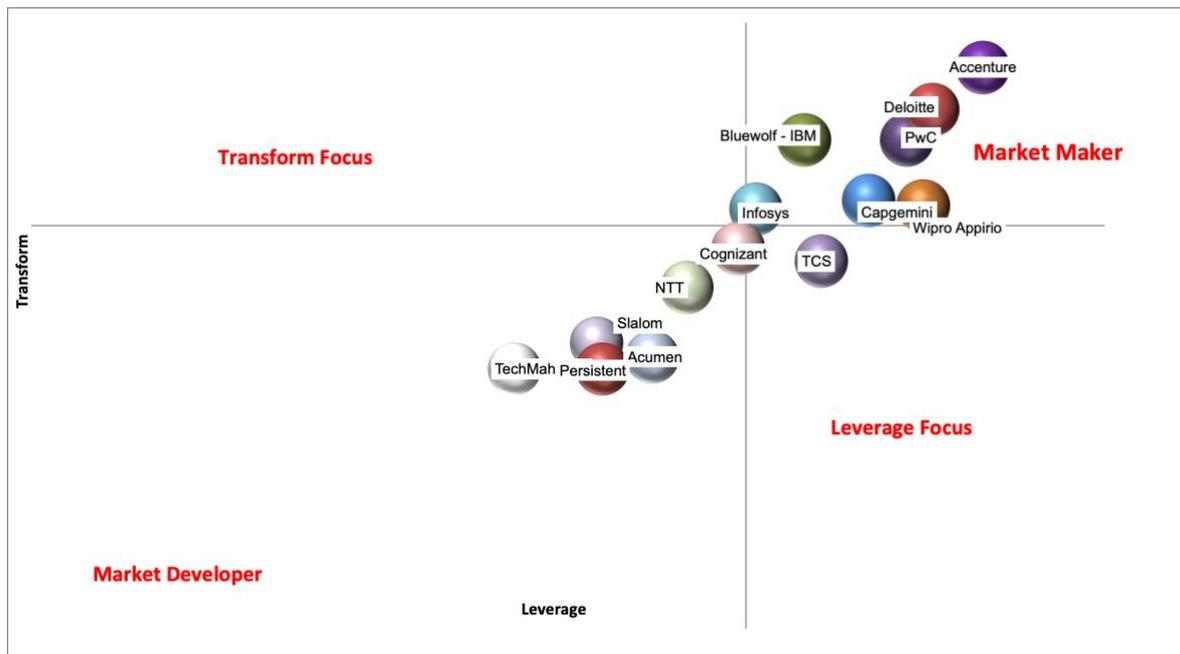
capioIT carefully selected 14 significant providers in the Global salesforce.com Systems Integration and Services Providers to undertake a Capture Share addressing the competitive environment of the Global salesforce.com Systems Integration and Services Providers marketplace. For more details on the Capture Share methodology, please see Appendix 1.

The following vendors were included in the analysis:

- Accenture
- Acumen
- Bluewolf-IBM
- Capgemini
- Cognizant
- Deloitte
- Infosys
- NTT
- Persistent
- PwC
- Slalom
- TCS

- TechMahindra
- Wipro Appirio

The chart below highlights the Capture Share results. Accenture has clearly maintained leadership on basis of scale and reach as well as functionality. It is no surprise that the top three are outcome orientated consulting firms. In short, their key differentiation is more than the scale of their capacity. It is the depth of their relationship with client executives to provide digital transformation based on cloud platforms.



Deloitte and PwC continue to provide the strongest competition and positioning to Accenture. What allows these three vendors to stand out, is their depth of relationships, globally. They have a consistency to their approach and relationships that are at the highest level of leadership, enabling outcomes for clients.

Following the major consulting firms is Infosys, Wipro, Capgemini and IBM. All have strongly established capabilities and are driven by scale and focus in most global geographies. The level of outcome based executive engagement varies somewhat, but as mentioned earlier, the level of capability in the Salesforce market is significantly higher than other established and emerging market. In simple terms, there are no bad vendors. All vendors included in the study have strong capabilities and are investing in the platform. That is part of the capioIT methodology. If you make the Capture Share shortlist, you are capable.

As the chart highlights there are four positions on the Capture Share. The axis of the Capture Share indicates the average ranking. For example, a vendor ranked as a Market

Maker has scored above average on both the transform and leverage attributes. A Leverage Focus vendor is above average for the leverage attribute and so on.

Vendors Rated as Market Maker

- Accenture
- Wipro-Appirio
- Bluewolf (an IBM Company)
- Capgemini
- Deloitte
- Infosys
- PwC

Vendors Rated as Transform Focus

Vendors Rated as Leverage Focus

- TCS

Vendors Rated as Market Developer

- Acumen Solutions
- Cognizant
- NTT
- Persistent Systems
- Slalom
- TechMahindra

Accenture has been the long-term leader in the Salesforce SI ecosystem. This leadership is organic but was accelerated by the strong record of acquisition over the past several years. Salesforce is a fundamental platform from a customer and investment perspective for Accenture, and this has been the pillar to develop market capabilities in a range of parallel and increasingly integrated Cloud Vendors such as ServiceNow, AWS, Google and Adobe.

In terms of leadership in the Capture Share report, Accenture is the outright leader in five of the attributes and joint leader in eight others. It has leadership in 13 of the 17 attributes. It has been ranked as the leader in all previous versions of this analysis from 2014.

In prior years Accenture has had up to three times the number of certified Salesforce resources of the competition. This delta has reduced substantially in the past 24 months in particular. The ease of training in Salesforce (from a platform perspective in particular, and as an internal vendor priority), and accelerating demand has ensured that amongst others IBM, TCS, Deloitte and Cognizant are increasingly catching up resource wise. The number of certified consultants highlights the ability to provide solutions at scale and is a very significant determinant of the leaders from the Market Developer vendors.

Deloitte is clearly a significant provider of Digital services and solutions for clients across a range of platforms, and globally is the strongest competitor to Accenture. It has the second largest pool of certified consultants. Unlike others, most of the strength in Deloitte capabilities has been gained organically, although it has benefited from some acquisitions.

PwC is the third ranked provider in the Market Maker category. As is typical for PwC, the strength it offers clients is the deep industry experience, client leadership buy in and the focus on business outcomes. It also has a broad geographic spread that reflects the overall PwC strengths.

IBM's success through the Bluewolf subsidiary is not the entire story. It works closely with Salesforce with Watson as well in the role as an elder statesman particularly of the enterprise IT Space. Of course, this is in alignment with the digital practice of IBM.

Wipro following the acquisition of Appirio, has become one of the two leaders from the perspective of the Indian vendors. Wipro has supplemented the acquisition of Appirio with 4C in Europe, and is reaching more deeply into clients, with the Salesforce business at times pulling the legacy Wipro business along.

Capgemini has entered the Market Maker category on the back of consistent growth, execution and enterprise relationships. Of course, it is strongest in Europe, but has increased capabilities particularly in targeted Asia Pacific markets. Again, with the leaders, it is strongest in enterprise transformation and integration of Salesforce across business outcomes.

Infosys has made a substantial leap into the Market Maker category through acquisitions such as Simplus and Fluidio as well as further maturity of capability from a broad Salesforce solution. The acquisitions have been essential to build scale in EMEA and Asia Pacific as well as the deep relationship with Salesforce enjoyed by Simplus in particular. As with most of the other leading vendors, the culture that the larger firms such as Infosys, IBM and Wipro have enjoyed is a significant outcome of the targeted acquisition approaches.

TCS is the only vendor ranked as a Leverage focused vendor. It has perhaps been left behind due to the acquisition approach of Infosys and Wipro but is still a highly capable provider with a significant delivery capability leveraging the Indian hub.

The remaining vendors are Market Makers. Whilst they have had varied stages of maturity in Salesforce solutions, all are investing. As has been highlighted by the likes of Wipro and Infosys, it is possible to build capability organically and inorganically to enter the leadership rankings. Most of the vendors in the Market Maker space have the capability to shake the broader leadership from a vendor perspective. Key to this is going to be a significant relationship with Salesforce itself and inorganic growth. It is also important to consider that leadership in Salesforce solutions is essential to have a leadership position in the overall As a Service market.

The following charts highlight the overall rankings and average scores for the two transform and leverage capabilities.

Vendor	Average Transform Score
Accenture	8.2
Deloitte	8.0
Bluewolf - IBM	7.8
PwC	7.8
Capgemini	7.5
Wipro Appirio	7.4
Infosys	7.4
Cognizant	7.2
TCS	7.1
NTT	7.0
Slalom	6.7
Acumen	6.6
TechMahindra	6.5
Persistent	6.5
	7.3

For the Transform capabilities, seven of 14 vendors were ranked as above average, with the remainder below the average. The three highest ranked providers from a transformation viewpoint are Accenture, Deloitte and in equal third place, PwC and Bluewolf (an IBM company). All are innovative and transformative enterprises and have made significant global investments in applications services across varied platforms. Other leaders in the transform category include Capgemini, Wipro Appirio and Infosys.

The rest have ground to make up in the Transform capability to ensure that their clients are gaining the strongest business outcomes from investment in the Salesforce platform. The more complicated and mature the ecosystem around Salesforce becomes, the more difficult this will be to achieve. Transforming client outcomes and success has to be the priority if vendors are to be able to convince prospects that they have differentiated capabilities in Salesforce.

Vendor	Average Leverage Score
Accenture	8.1
Deloitte	7.9
Wipro Appirio	7.9
PwC	7.9
Capgemini	7.7
TCS	7.6
Bluewolf - IBM	7.5
Infosys	7.4
Cognizant	7.3
NTT	7.1
Acumen	7.0
Persistent	6.9
Slalom	6.8
TechMahindra	6.6
	7.5

For the leverage characteristics again, 7 of the 14 vendors scored above the average, and 7 below. The contrast with the transform attributes confirms the split in the market. Scale is important, but to be truly differentiated and centred on client outcomes, focus has to be on transforming the client experience. Accenture led, followed by Deloitte, Wipro and PwC follow. Interesting, whilst it leads, Accenture's gap at the head of the line has reduced slightly in recent years.

The average rating for each of the attributes is in the following table. Again, this analysis highlights that there is opportunity for differentiation by providers that is not being leveraged. Not surprisingly, the attributes that lag the average to the greatest extent reflect the difficulties in overcoming the incumbent leaders such as Accenture, Deloitte and PwC.

The ability to influence the market is the lowest rated, reflecting the strength at the top. This is followed by the perennial challenge of Country Solution Development and the strength of the Brand. Clearly, localising Salesforce is a priority across the ecosystem. The internal R&D is a concern, it is just on the average, and to enable stronger transformation capabilities, this needs to become a key investment platform for leaders and challengers alike.

On the positive, it is not surprising that partners have been successful in leveraging Salesforce R&D, as well as the broader Salesforce ecosystem. The global Salesforce ecosystem is so critical to the success of the platform.

Average Transform Attribute Score	Score
Internal R&D	7.3
Leverage salesforce.com R&D	7.5
salesforce.com Ecosystem Partnership	7.6
Global Solution Development	7.5
Industry Solution Development	7.5
Country Solution Development	7.1
salesforce.com Platform Implementation	7.4
Strength of Brand	6.8
Ability to influence external market	6.5
Transform	7.3

In this year's study, the leverage rankings highlight a significant issue. There is one attribute that leads all others. In fact, it is the only attribute above the weighted average. Customer Satisfaction. It just reinforces how significant Customer Satisfaction is, in order to drive capability, customer experience and outcomes from investment in Salesforce for the integrator and the customer perspective. Whilst in many cases the other attributes are just below the average, the split in the market is one that is not sustainable. Customer Satisfaction cannot be maintained without investment in adjacent capabilities such as resources, delivery partnerships and of course solution depth.

These findings reinforce the issue of skills in the marketplace. Leaders do not rely on Salesforce to lead the way in skills development. They are proactive in driving the capability themselves.

Average Leverage Attribute Score	Score
Customer Satisfaction	7.9
Solution Portfolio Depth	7.4
Certified salesforce.com skills	7.2
Country Strength	7.0
Sales Team strength	7.2
Delivery Partnerships	7.3
In Country Geographic Reach	7.4
Country localisation	7.4
Average	7.5

Not surprisingly, Accenture leads the way in AWS leads the market in 12 of the 17 attributes. For five of these attributes, it stands alone at the top of the rankings. Interestingly, this was consistent with the 2018 study. Following Accenture, Deloitte, PwC and Bluewolf (an IBM Company) are the leaders in the individual attributes.

Note - Due to the measurement of leadership in the market it is possible for multiple vendors to share leadership in the market. Where there is one vendor named, that vendor is the highest ranked vendor, with no other vendor having an equivalent score. Where there are multiple vendors, all were ranked as the equal leaders in the market.

Leverage Attribute Top Ranked Vendors (note can be multiple vendors)

Customer Satisfaction	Wipro Appirio,
Certified Salesforce.com Skills	Accenture
Solution Portfolio Depth	Accenture
Overall Country Strength	Accenture, Bluewolf (an IBM Company), Wipro Appirio
Sales Team Strength	Accenture, Capgemini, Cognizant, Deloitte, PwC,
Delivery Partnerships	Capgemini, PwC, TCS, Wipro Appirio
In Country Geographic Reach	Accenture, Bluewolf (an IBM Company), Deloitte, PwC
Country localisation	Acumen, Bluewolf (an IBM Company), PwC, Slalom

Transform Attribute

Top Ranked Vendors

Internal R&D	Accenture, Deloitte,
Leverage Salesforce.com R&D	Accenture, Capgemini, Deloitte, Persistent, PwC
Salesforce.com Ecosystem	
Partnership	Accenture
Global Solution Development	Accenture
Industry Solution Development	Accenture, Acumen, Bluewolf (an IBM Company), , Cognizant, Deloitte, Infosys, Slalom
Country Solution Development	Bluewolf (an IBM Company)
Salesforce Delivery Platform	Accenture, Bluewolf (an IBM Company), Capgemini, Deloitte, PwC
Strength of Brand	Accenture
Ability to influence external market	Accenture, Deloitte, PwC

WHAT ATTRIBUTES DO LEADERS IN THE GLOBAL SALESFORCE.COM SYSTEMS INTEGRATION AND SERVICES PROVIDERS SHARE

Leaders in the Global Salesforce.com Systems Integration and Services Providers marketplace share core attributes

- Long-term investment in the Salesforce ecosystem
- Growth with Salesforce. As it expands into new capabilities leading partners are the first to move with them
- Global commitment of capital and resources to the Salesforce ecosystem
- Integration and cross investment to a broader SAAS ecosystem and increasingly the Public Cloud Platforms of Google, Azure and AWS.
- Investment in a global capability to support Salesforce expansion
- Engagement in Trailhead to drive certification, culture and skills.
- Focus on IP and asset-based solutions, not just throwing human resources at the problem.
- Development of outcomes to drive business success that is measured
- Above all other, enabling Salesforce clients to drive enhanced customer experiences

CHARACTERISTICS OF THE MARKET MAKER RANKED PROVIDERS

Accenture

Accenture remains the number one provider in the global Salesforce Services market. This was achieved through inorganic and organic growth, but the positioning has been accelerated by scale, ongoing investment and increasingly integration into the broader Cloud Services portfolio of Accenture from a SaaS, IaaS and PaaS.

It is also marked by strong relationships with Salesforce, and the broader ecosystem with investments in ISV's.

Top three Salesforce solutions capabilities

- Strength of Brand
- Certified Salesforce resources
- Global Solution Development

Bluewolf (An IBM Company)

IBM gained momentum in the Salesforce ecosystem with the acquisition of Bluewolf. It has developed capabilities in the direct SI ecosystem. It however, also has the benefit of

bringing the strength of IBM to customer engagements. This is primarily through the Watson and AI capabilities.

Top Three Bluewolf (An IBM Company) Capabilities

- Country Strength
- Country Solution Development
- Customer Satisfaction

Deloitte

Deloitte remains a consistent and capable provider of Salesforce Solutions globally. It is able to provide high levels of business engagement and customer outcomes based upon the depth of relationships that it brings to the engagement and the global scale of the Deloitte group.

Top Three Deloitte Capabilities

- Certified Salesforce.com Skills
- Salesforce.com Ecosystem Partnerships
- Ability to Influence the External Market

PwC

PwC has a strong capability to drive customer outcomes, loyal customer, and perhaps the highest level of integration into client executive leadership for Salesforce outcomes. These relationships are a key differentiator on the back of PwC global footprint and revitalised consulting.

Top Three PwC Capabilities

- Customer Satisfaction
- Delivery Partnerships
- Salesforce Ecosystem Partnership

Wipro-Appirio

Wipro acquired Appirio in 2016. Since then the two combined entities have moved sharply ahead, successfully offering capabilities in the Salesforce ecosystem. Key strengths include the global scale offered by Wipro and breadth of resources. It also ranked highly for customer satisfaction

Top Three Wipro Appirio Capabilities

- Customer Satisfaction
- Country Strength
- Global Solution Development

Capgemini

Capgemini has played to strengths from the perspective of Salesforce. A deep relationship with Salesforce is key, but in particular it is strong in the European region. This alongside

capabilities in other geographies and key industries such as Retail and Transportation have ensured that it is a leading provider.

Top Three Capgemini Capabilities

- Sales Team Strength
- Delivery Partnerships
- Leverage Salesforce.com R&D

Infosys

Infosys has been making steady increases in capabilities around the Salesforce ecosystem. It had primarily taken an organic approach but in the last year or so drove growth through acquisition with Simplus and Fluidio. These acquisitions have provided both geographic and offering strength particularly in Quote to Cash driving growing certification and customer satisfaction.

Top Three Infosys Capabilities

- Customer Satisfaction
- Leverage Salesforce.com R&D
- Industry Solution Development

APPENDIX 1 - METHODOLOGY FOR THE CAPTURE SHARE ANALYSIS

Capture Share reports are based on the analysis of 17 key capabilities and attributes of services providers. These attributes are focused in two key areas, Transform and Leverage.

In order to undertake the appropriate level of analysis and data integrity, the individual attributes are weighted in percentage terms on the basis of the overall influence for the Transform and Leverage capabilities.

Clearly data and process integrity are a critical component of a report of this type. It is fundamental that the data be valid and untarnished. To help ensure this, all information for the measurement and assessment of these attributes comes from a range of sources to ensure a range of opinions. Sources of information include Salesforce.com, Salesforce.com users, vendor briefings and meetings, media sources, the IT solutions ecosystem and specific end-user feedback.

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ABOUT CAPIOIT

capioIT was founded in 2010. It is focused on helping a range of organisations capture and understand emerging digital technology in emerging markets of the global economy. CEO Phil Hassey has over 20 years' experience in corporate strategy, consulting and market intelligence, gained in a diverse range of organisations and industries.

The core of capioIT -

- **Capture** – Focus on ensuring that you capture the current and future pulse of emerging markets and emerging technology.
- **Understand** – Source information to ensure that all customers and stakeholders are able to understand and drive strategy to maximise engagement with their customers.
- **Collaborate** – Through strategic partnerships we have ensured that a small regionally based firm has highly elevated levels of market engagement and influence across technology and geography.
- **Innovate** – We are not satisfied with the current evolution of the analyst/research market. We have listened and engaged and we drive innovation through our engagement model, business culture, use of social media and relationships.





Capture Understand Collaborate Innovate

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