

IDC MarketScape

IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2020 Vendor Assessment

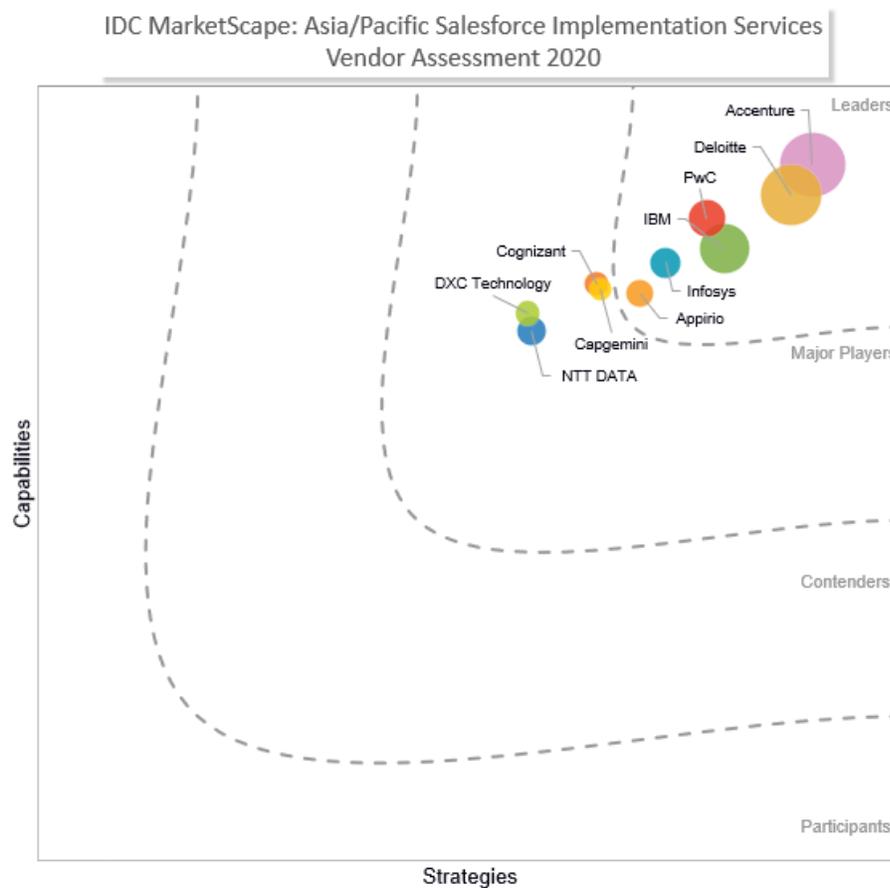
Rijo George Thomas

THIS IDC MARKETSCAPE EXCERPT FEATURES INFOSYS

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Asia/Pacific Salesforce Implementation Services Vendor Assessment, 2020



Source: IDC, 2020

Please see the Appendix for detailed methodology, market definition and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2020 Vendor Assessment (Doc # AP46211420). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Creating differentiated customer experiences that goes beyond omni-channel support and personalized interactions is a key driver for enterprises embarking on a front-office transformation journey in Asia/Pacific. Over the years, Salesforce has positioned itself as a front-office transformation platform capable of converging data and intelligence to transform every aspect of the customer experience, ensuring there is business value generation throughout the customer journey. According to Salesforce, Asia/Pacific witnessed tremendous growth in its adoption and is now a key strategic region making up approximately 10% of its overall global revenue for the FY20 period.

As Salesforce adds new products to its portfolio (Tableau, MuleSoft, Vlocity, work.com, etc.), aligns its go to market (GTM) with industry solutions, and ties its value proposition to business outcomes of customers, the implementation of Salesforce solutions become increasingly complex. Enterprise buyers bank on the expertise of their implementation service partners to enhance (and in some cases, realize) the value of their investments by tailoring solutions to their respective industry, integrating with internal business systems, attaching localized support services, and extending innovations on the Salesforce platform to fit long-term business needs. Consequently, the services ecosystem around Salesforce implementation is expected to grow as fast, if not faster, than Salesforce in the Asia/Pacific region.

This IDC study assessed Salesforce implementation vendors in the Asia/Pacific region based on both the strength of their current service capabilities and how well placed they are to grow Salesforce adoption with their sound growth strategy. The key findings of this assessment include:

- **Salesforce practice units to hone GTM.** Although most partners leverage Salesforce as a key technology offering in their customer experience services, we found that partners today have a more focused approach to Salesforce services and are building dedicated practice teams to bolster customer experience capabilities. These Salesforce practices bring together a host of talent (consultants, architects, sales, and marketing professionals), ecosystem partners, and specific assets to channelize customer experience services with Salesforce as the technology core.
- **Strong range of services.** Among all the measurement criteria, Salesforce implementation partners performed well on the range of services criteria indicating that most participants had mature services around the implementation of core Salesforce products. IDC research also found that some partners excelled in localizing services for customers in Asia/Pacific and leveraged their intellectual property (IP) to differentiate service delivery.
- **Top strategies in focus.** From the overall assessment of the strategy criteria of participating vendors, IDC observed that vendors strived to fine-tune regional strategies for the effective growth of Salesforce services in Asia/Pacific, enabled mainly by the effective alignment of Salesforce implementation services to the digital vision of its customers. Additionally, vendors also showcased well-articulated plans for lowering client churn in the future through IP and differentiated service delivery across Salesforce solutions.

- **Mature design and consulting services.** The consulting and design capabilities of implementation partners are instrumental in helping enterprises visualize the transformation outcomes from Salesforce solutions. These services also help enterprises extend innovations on the Salesforce platform to fit long-term business needs and prepare for changing end customer demands. According to IDC's analysis, the participating firms scored well in the essential capability criteria that measured the vendor's ability to provide comprehensive design and consulting services around Salesforce solutions, indicating implementation partners had strong design and consulting capabilities (mostly through acquisitions). Some vendors excelled in providing immersive experiences through unique consulting and co-creation frameworks that focused on accelerating time to value and creating differentiated customer experiences.
- **Bolstering capabilities through acquisitions.** Vendors continue to bolster Salesforce service capabilities with regional and global acquisitions. Initially, the strategic rationale for most acquisitions were to integrate the consulting/design capabilities from boutique agencies. As the market matured, the acquisition strategies of vendors were also underpinned by the need to possess superior industry play, technical talent, and service capabilities in specific Salesforce solution areas, such as marketing, commerce, experiences, Vlocity, MuleSoft, and so forth. Some vendors have successfully integrated, or are in the process of integrating, these acquired capabilities, whereas others have consciously decided to retain the branding of the acquired firms.
- **Increased localization in service delivery.** Salesforce customers often highlight the need for high-touch services during and after Salesforce implementations. This is particularly important if the enterprise operates in multiple locations in Asia/Pacific. To cater to the growing localization needs of customers, Salesforce and its implementation partners are ramping up investments in Asia/Pacific, with delivery centers and local technical consultants in each market unit. Despite the pandemic, these services are delivered virtually and remotely.
- **Changing customer demands.** As part of this IDC MarketScape, we interviewed several current Salesforce customers and found that the ability to deliver business outcome, provide faster time to value, and consult and design capabilities were the top differentiating capabilities customers look for in an Salesforce implementation partner. IDC's research also identified cost competitiveness, innovative pricing, and engagement models, and automation for effort reduction as the key areas Salesforce implementation partners need to improve in general.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This evaluation does not offer an exhaustive list of all the players in the Asia/Pacific Salesforce implementation services partner ecosystem. IDC narrowed down the field of players based on the following criteria and subsequently collected and analyzed data on these 10 implementation services partners for this IDC MarketScape:

- **Revenue.** Each service provider was required to have a 2019 total revenue (from Salesforce implementation services) that exceeded US\$20 million in Asia/Pacific.
- **Geographical presence.** Each participating vendor was required to have implementation services capabilities in at least four sub-Asia/Pacific regions: North Asia (South Korea), Greater China (China, Hong Kong, and Taiwan), Southeast Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and the Philippines), India, Australia and New Zealand (ANZ), and Japan (mandatory).

- **Service capabilities.** The vendor should have demonstrated end-to-end service capabilities around Salesforce implementation, spanning consulting and advisory services, customization/development services, systems integration (SI) services, and migration services in Asia/Pacific.
- **Products covered.** Participating vendors should provide implementation services around a minimum of four of the product categories of Salesforce, including sales, marketing, service, commerce, and Customer 360, and others, such as Engagement, MuleSoft, Analytics, and Vlocity industry cloud.

Note: Although both Bluewolf appears as a Global Strategic Partner on the Salesforce AppExchange, its evaluation is combined with that of IBM.

ADVICE FOR TECHNOLOGY BUYERS

This IDC study represents a vendor analysis and assessment of the 2020 Asia/Pacific Salesforce implementation services market through the IDC MarketScape model. This research explains vendors' success in the Salesforce implementation services marketplace and how well placed they are to grow in the Asia/Pacific region.

Based on this study, IDC recommends that buyers consider the following pieces of advice before starting new Salesforce implementations or while embarking on a transformation journey:

- **Give adequate attention to change management.** To maximize the value from Salesforce investments, enterprises need to provide ample weightage to people and process changes along with the technology integration changes required for transformation. Invest in a holistic change management strategy that captures the requirements of the sales and marketing team, tracks outcomes from the implemented solution, and creates a feedback loop to foster continuous innovation.
- **End-to-end solutions rather than piecemeal.** Reimagine customer experiences with end-to-end solutions rather than piecemeal solutions stitched together with complex integrations. Look for partners capable of unifying the growing portfolio of Salesforce solutions to provide transformative outcomes that redefine customer experiences and open new avenues of engagement.
- **Ideate and visualize experiences with the partner.** Salesforce implementation partners are continuously exploring new ways to help customers reimagine customer experiences and scale new engagement models. Look for partners capable of bringing together tools, best practices, methodologies, and platforms, such as innovation hubs, to visualize the front-office transformation enabled by Salesforce solutions.
- **Industry expertise.** As Salesforce continues to expand its portfolio of industry cloud solutions, it is important to consider the industry expertise of the implementation partner. Evaluate the partner's ability to provide full-stack industry solutions, out-of-the-box industry accelerators, and expertise in Salesforce industry cloud that can provide superior time to value and upfront cost savings.
- **Look for local support capabilities.** Many customers interviewed by IDC indicated the need for high-touch support from Salesforce and its partners, especially where there are multiple integration and platform applications in the Salesforce implementation. Hence, evaluate the partner's local support capabilities and synergy with the Salesforce team to ensure proactive support during implementation.

- **Remote implementations, new pricing models and opex management.** Disruptions brought by the COVID-19 pandemic exposed the gaps in the service delivery and engagement models of many implementation partners in Asia/Pacific. It is important that going forward, buyers consider the remote implementation capabilities and service resiliency plans of implementation partners to tackle any unforeseen challenges that may arise during implementations. Buyers can also demand Salesforce implementation partners to propose new pricing models other than capacity and fixed pricing models with more business value outcomes. Additionally, buyers need to also consider the implementation partner's approach to reduce the opex from Salesforce investments after implementation.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of the vendor's strengths and opportunities.

Infosys

According to IDC analysis and buyer perception, Infosys is positioned as a leader in IDC's 2020 MarketScape: Asia/Pacific Salesforce Implementation Services Vendor Assessment.

Infosys provides end-to-end implementation services (design, advisory, consulting, SI, migration, etc.) across the entire portfolio of Salesforce offerings.

Infosys has channelized its approach to Salesforce implementation under its Envision, Elevate, Excel, and Enable themes: Envision consists of a set of design thinking and consulting services to amplify the digital capabilities of the enterprise; Elevate includes modernization services hinged on the Infosys Customer Experience (CX) Maturity Model to enable a future-ready connected enterprise; Excel is focused on accelerating time to value through agile deployments, industry solutions, Infosys tools, and accelerators; and Enable is focused on partner enablement and scale through training services across multiple clouds.

At the core of Infosys' differentiation in the Salesforce implementation market is its highly localized geostrategy in Asia/Pacific, advisory-led positioning enabled by digital innovation studios, and a plethora of industry accelerators to enable better time to market. Infosys also draws on the strength of its rich repository of horizontal tools and accelerators to reduce time and effort in Salesforce implementations. Infosys has also showcased extensive focus in implementing and growing Salesforce solutions in analytics, integration, and industry cloud. IDC found Infosys to showcase strong use cases in which it supported large-scale Vlocity and MuleSoft integration projects in the Asia/Pacific region, especially for telecom clients in Southeast Asia and ANZ.

Infosys houses most of its Salesforce resources in India, followed by ANZ and Southeast Asia. Currently, Infosys has a relatively lower Salesforce resource strength in Japan and China. At the time of this study, the largest verticals in Infosys' Salesforce practice in Asia/Pacific were telecom, financial services, and manufacturing. Infosys has made several acquisitions globally to strengthen its experience design and Salesforce delivery capabilities. This includes Wongdoody (a creative agency based in the United States), Brilliant Basics (a product design and customer experience studio), Fluidio (a Salesforce consulting partner in Sweden), and most recently Simplus (a Platinum Salesforce Partner based outside of ANZ). Infosys also announced the acquisition of Blue Acorn iCi, a digital customer experience, commerce, and analytics company.

Infosys and Salesforce have several joint GTM initiatives in Asia/Pacific, especially for Vlocity, and marketing solutions in which both the firms jointly showcase solutions to customers to expedite their digital transformation journey.

Strengths

Infosys' strengths are:

- **Highly localized GTM for Asia/Pacific.** Infosys showcased well-rounded localization in its GTM for Salesforce services in Asia/Pacific, with specified approaches in each market unit it operates (ANZ, Southeast Asia, Japan, Greater China, and India).
- **Strong automation focus in Salesforce delivery.** Infosys demonstrated a strong focus in developing tools and accelerators to complement its Salesforce implementation and delivery. Additionally, its rich roster of automation frameworks has been instrumental in enabling effort reduction in implementation and accelerating time to market of Salesforce solutions.
- **Innovation alignment.** Infosys emphasized on its efforts to continuously cultivate client innovation on Salesforce solutions, leveraging the Infosys Center for Emerging Technology Solutions (iCETS). Infosys also leverages its regional innovation hubs to enable client collaboration and the prototyping of solutions.

Client Feedback

Clients interviewed by IDC praised the domain expertise of Infosys in Salesforce cloud solutions, quality of resources in the implementation team, and aligning Salesforce solutions to the digital aspirations of the enterprise.

Challenges

Infosys' challenges are:

- IDC recommends that Infosys place its industry capabilities, especially its accelerators and consulting capabilities in Salesforce implementation, more prominently in its GTM.
- Clients would appreciate if Infosys amplified the long-term view from Salesforce solutions, especially when preparing the project plan for implementations.

Consider Infosys When

Infosys is a good fit for enterprises looking for a Salesforce implementation partner with experience handling large implementation projects and delivering complex systems integration requirements.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and GTM plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

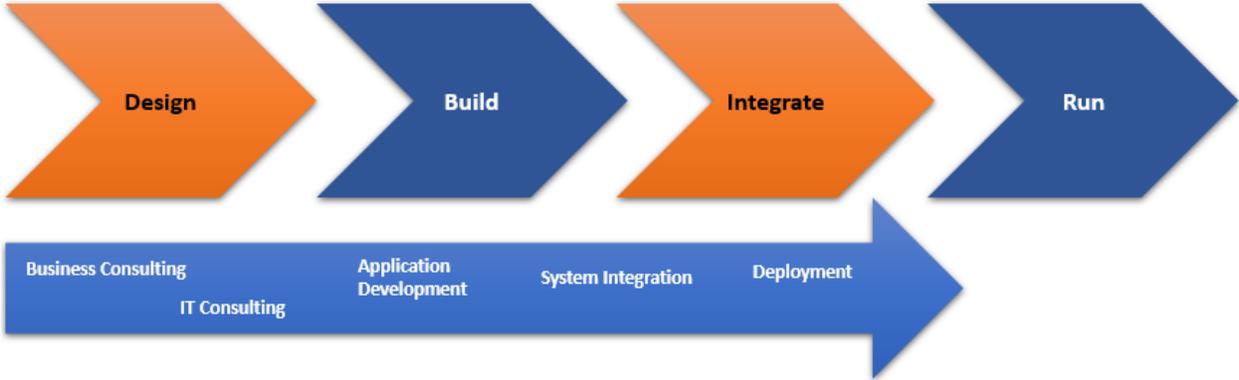
IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

The Salesforce implementation services market covers the design, build, and integrate functions of the design-build-run function chain (see Figure 2). The design phase includes both IT and business consulting. For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019).

FIGURE 2

IDC's Design-Build-Run Function Chain



Source: IDC, 2020

LEARN MORE

Related Research

- *What Are the Top Capabilities Enterprises Find as a Differentiator and as Essential in a Customer Relationship Management and Enterprise Resource Planning Implementation Partner?* (IDC #AP46758520, August 2020)
- *Which Is the Most Preferred Cloud Environment for Running CRM and ERP Workloads in APEJ?* (IDC #AP46760220, August 2020)
- *Asia/Pacific (Excluding Japan) Application Management Services Market Shares, 2019: IDC's Top 10 Vendors* (IDC #AP45396320, June 2020)
- *Service Opportunity Around Cloud-Based Customer Relationship Management and Enterprise Resource Management Applications in Asia/Pacific (Excluding Japan), 2019-2023* (IDC #AP45875920, April 2020)
- *Salesforce TrailheaDX: Perfecting an Ecosystem-Driven Transformation for Customers* (IDC #AP44706319, January 2020)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of service providers participating in the Salesforce implementation services market with specific offerings and capabilities in the segment. It discusses both the quantitative and qualitative characteristics that lead to success in the ecosystem. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to one another and the criteria and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"The Asia/Pacific has witnessed tremendous growth in Salesforce adoption and, consequently, the services ecosystem around Salesforce implementation is expected to grow as fast if not faster than Salesforce in the Asia/Pacific region. Implementation partners continue to make strategic investments in Asia/Pacific to bolster regional capabilities, the success however will be dictated by the implementation partner's focus in creating differentiated and immersive customer experiences by tailoring the growing portfolio of Salesforce solutions to the customer's respective industry, attaching localized support services, and extending innovations on the Salesforce platform to fit long term business needs." says Rijo George Thomas, senior market analyst of software and services research, IDC Asia/Pacific

About IDC

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