iSG Provider Lens™

Salesforce Ecosystem Partners

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | **MARCH 2024** | **U.S.**

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Salesforce implementations demand optimization services and innovative solutions such as GenAI

Long-term growth and resulting implementation capacity demand

Since its founding in 1999, Salesforce has demonstrated impressive growth over many years and is now one of the leading providers of cloud-based application systems in the form of Software-as-a-Service (SaaS). While growth rates ranged between 24 and 29 percent from 2018 to 2022, in 2023, they slowed to between 10 and 15 percent. Whether this is a temporary phenomenon or whether, given the considerable size of the company by now, the plateaued growth should be seen more as a normalization, cannot yet be conclusively determined. However, all signs indicate that Salesforce is likely to continue growing significantly in the coming years.

The substantial growth over the aforementioned period has also led to a growing demand for services around the Salesforce platform, primarily for implementation support, but also increasingly for support in operating the ongoing applications. The limited availability of qualified employees with Salesforce expertise is a factor that constrains the number of implementations that can be completed, although recent market developments have partially relaxed this situation. Consequently, ISG has observed considerable consolidation pressure the market for corresponding services, with major system integrators continuously seeking opportunities to expand their capacity by acquiring other providers.

In addition to acquisitions, which ultimately do not generate additional capacities in the market, many providers also focus on increased recruiting. On the one hand, young talents are hired and trained as Salesforce consultants through suitable qualification measures. On the other hand, within some companies, experienced consultants from other areas

Flattened market growth and the upcoming GenAI innovations characterize the current Salesforce market.

are certified or recertified in Salesforce. While partnering with such companies, Salesforce significantly contributes to additional implementation capacities. Salesforce has also contributed to consolidation pressure, especially in the U.S., by acquiring well-known midsized providers, such as Acumen and Traction on Demand. However, it seems unlikely that Salesforce will enter the system integrator market on a large scale in this manner; instead, these acquired capacities will be used for further platform development to support market introductions.

Customer structure

The U.S. is Salesforce's home market, and as such, the company holds an exceptionally high market share. Owing to the market size, the customer structure in the U.S. is highly diverse.

- First, there is a group of globally operating large corporations with complex IT support requirements. These corporations often require global rollouts of a largely standardized core system, which may need to be supplemented with region-specific functions in respective countries. Such

extensions frequently involve regulations regarding billing and tax determination. For these globally operating companies, large system integrators, given their global presence, are primary candidates for support in Salesforce implementation and operations. These providers usually follow a global delivery model with significant nearshore and offshore components. Nearshore components are often provided from Mexico or countries in South America.

- Second, midsize companies also play a significant role in the U.S., both in their number and business volume. These companies often prioritize the North American region, with additionally limited business interests overseas, such as in Europe or Asia. Consequently, their IT support requirements have fewer regional aspects to consider and are often less complex than those of large corporations. Therefore, Salesforce implementations for these companies are often largely standardized, with only industry-specific requirements potentially leading to extensions. These companies often rely

on implementation services from midsize providers based in the U.S., typically with a staff size of 100 – 500 employees. Integration aspects are also less significant for these companies. Ongoing operational support mainly involves support for upgrades and possibly necessary developments. Service delivery is conducted within the U.S., although there is an increasing use of nearshore offerings, mainly from Central or South America.

- Lastly, there is another significant segment of the market comprised of many smaller companies that, like midsize companies, predominantly obtain their implementation services from local or regional providers operating primarily from U.S. locations.

Provider structures and technologies

In the 12 months since the release of the last IPL study on this subject, the provider structure in the market for Salesforce implementation services has not structurally changed beyond the mentioned general consolidation trend.

The Hybrid Agile model remains the preferred implementation method for deployments at

globally operating customers that need to integrate Salesforce into complex system landscapes. This model typically combines Agile approaches for implementation, with phased approaches for strategy, design, and rollout. Presently, most providers offer this method. A purely Agile methodology is still suitable for the isolated implementation of a Salesforce instance. This strategy is more common among midsize customers with limited integration requirements and no need for a global rollout.

The MuleSoft platform continues to be the preferred tool to integrate Salesforce with other applications. Thus, comprehensive MuleSoft competency has become a prerequisite to survive in the Salesforce implementation provider market. Major system integrators primarily operate a dedicated area or department of considerable size where relevant capacities are consolidated.

Salesforce's verticalization strategy and its implications

Several years ago, Salesforce began developing and offering products with industry-specific features, in addition to products focused more

on functional aspects, such as the Sales Cloud and Service Cloud. Among the pioneering products in this category were the Financial Cloud and Health Cloud. Since then, a range of additional products have been added, naturally exhibiting different maturity levels owing to their distinct introduction times. Verticalizing the product portfolio has now become an explicit strategy for Salesforce. This strategy was significantly accelerated by the acquisition of Vlocity in 2020. Traditionally, Vlocity was a strategic Salesforce independent software vendor (ISV) developing industry-specific applications on the Salesforce platform. Following the acquisition, Vlocity's capabilities contributed to strengthening Salesforce's industry-specific products. Vlocity's products are a significant core of Salesforce's verticalization strategy.

Salesforce's approach presents a series of opportunities for additional revenues and poses some challenges for service providers. The new products offer an opportunity for providers that have technological expertise and domain knowledge in specific industries attract additional customers. On the customer side, the new strategy requires a detailed examination of the new possibilities and the preparation for a decision regarding potential deployment. However, according to ISG, potential additional licensing costs are viewed critically, as Salesforce license costs have become a considerable factor for many companies. Moreover, the type of transition models that Salesforce will offer to customers that have already invested in functional clouds is unclear. Thus, enterprises initially hesitate to undergo the transition to industry-specific clouds. Service providers need to develop corresponding consulting offerings for efficient license management, and Salesforce needs to adjust its pricing models to overcome new challenges.

Generally, many client companies find it challenging to keep up with the innovation pace of software providers, including Salesforce, and to swiftly leverage the new opportunities. Strategic developments such as the described verticalization strategy are often perceived as disruptive and can lead to client companies to initially resist new developments. Here again, service providers are required to support their respective clients by offering competent consulting services to evaluate changes and make necessary selection decisions.

Partnerships

A significant demand persists for addressing requirements beyond the standardized functionality of Salesforce products through additional products from ISVs. These are typically offered with separate licensing through the AppExchange Store portal that Salesforce operates. Salesforce ensures that individual apps meet basic software quality requirements such as bug fixes, maintenance cycles and compatibility with Salesforce products. For all providers, whether they are system integrators or Salesforce-specialized providers (known as boutique providers), strong partnerships with ISVs within the Salesforce ecosystem remain crucial. This aspect applies not only to implementation but also to the subsequent ongoing operational support.

Furthermore, several providers benefit from close partnerships with Salesforce. Occasionally, these development partnerships, which may culminate in a potential joint product launch. In some cases, partnerships with Salesforce are established for joint implementations with service providers. This step enables these providers to access additional opportunities and also increases their dependence on Salesforce.

Current technological developments

The use of generative AI (GenAI) is undoubtedly a key topic in IT innovation. Since the emergence and success of OpenAI's ChatGPT, such advancements have been at the forefront of technological development for all software product providers, including Salesforce. In mid-2023 Salesforce announced the integration of OpenAI's products into its offering and labeled it as Einstein GPT. In this context, Salesforce's Data Cloud has also significantly expanded as a central platform for data management, because Einstein GPT increasingly relies on its usage. Service providers play a pivotal role as key partners to help their clients to evaluate these new opportunities and their productive utilization.

Furthermore, many service providers also offer expertise in integration with OpenAI or

other products currently in their introductory phase, such as those from Microsoft or Google. Promising initial approaches and successful implementations already exist. However, such projects are mainly in their early and experimental phases. Due to the limited experience with these technologies, it is currently not feasible to provide sufficiently reliable forecast about further developments. The long-term market dominance of specific products remains unclear. Nevertheless, these technologies and their utilization will remain essential to shaping development in the coming years.

Closing remarks on leading service providers in this study:

- Leading providers offer technological expertise and combine it convincingly with process knowledge to ensure the effective implementation of Salesforce.

- Leading providers maintain close partnerships with Salesforce and other technology providers and ISVs.

- Leading providers can support customers in utilizing Salesforce as a platform for continuous innovation. GenAI will be the focal point in the upcoming years.

- Leading providers assist customers to efficiently manage their operational processes and achieve optimized utilization of their licenses and related cost management.

> Despite recent flattening growth rates in the market, all indicators point to continued Salesforce expansion in the upcoming years. The Salesforce implementation market is increasingly influenced by Salesforce's verticalization strategy and the GenAI revolution, which underscores a shift toward more data-oriented approaches.

Provider Positioning

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
A5	Not In	Product Challenger	Not In	Not In	Contender	Not In
Accenture	Leader	Not In	Leader	Leader	Not In	Leader
Algoworks	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
AllCloud	Not In	Product Challenger	Not In	Not In	Contender	Not In
Apps Associates	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Birlasoft	Not In	Leader	Not In	Not In	Leader	Contender
Brillio	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Capgemini	Leader	Not In	Leader	Leader	Not In	Product Challenger
CGI	Contender	Not In	Not In	Contender	Not In	Not In
Coastal Cloud	Not In	Leader	Leader	Not In	Not In	Leader

Provider Positioning

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Coforge	Not In	Leader	Not In	Not In	Leader	Product Challenger
Cognizant	Leader	Not In	Leader	Leader	Not In	Leader
Customertimes	Leader	Not In	Not In	Product Challenger	Not In	Product Challenger
Deloitte	Leader	Not In	Leader	Market Challenger	Not In	Leader
Demand Blue	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
EPAM	Market Challenger	Not In	Product Challenger	Contender	Not In	Not In
Eviden	Product Challenger	Not In	Contender	Product Challenger	Not In	Contender
Fast Slow Motion	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Fujitsu	Contender	Not In	Not In	Contender	Not In	Not In
Grazitti	Not In	Rising Star ★	Not In	Not In	Leader	Not In

Provider Positioning

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	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
HCLTech	Leader	Not In	Product Challenger	Leader	Not In	Leader
Hexaware	Not In	Leader	Not In	Not In	Leader	Product Challenger
Huron	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
IBM	Leader	Not In	Leader	Market Challenger	Not In	Leader
Infosys	Leader	Not In	Leader	Leader	Not In	Leader
Jade Global	Not In	Rising Star ★	Product Challenger	Not In	Rising Star ★	Product Challenger
KPMG	Market Challenger	Not In	Not In	Not In	Not In	Not In
LTIMindtree	Rising Star ★	Not In	Product Challenger	Leader	Not In	Rising Star ★
Marlabs	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Mastek	Not In	Product Challenger	Not In	Not In	Not In	Product Challenger

Provider Positioning

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Merkle	Not In	Not In	Product Challenger	Not In	Not In	Not In
Mphasis Silverline	Not In	Leader	Product Challenger	Not In	Leader	Product Challenger
NTT DATA	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Not In
OSF Digital	Product Challenger	Not In	Not In	Not In	Not In	Not In
Perficient	Not In	Leader	Rising Star ★	Not In	Leader	Product Challenger
Persistent Systems	Product Challenger	Leader	Leader	Rising Star ★	Leader	Leader
Publicis Sapient	Product Challenger	Not In	Not In	Not In	Not In	Not In
PwC	Market Challenger	Not In	Market Challenger	Market Challenger	Not In	Market Challenger
Slalom	Product Challenger	Not In	Leader	Product Challenger	Not In	Not In
Tavant	Not In	Contender	Not In	Not In	Contender	Not In

Provider Positioning

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
TCS	Leader	Not In	Leader	Leader	Not In	Leader
Tech Mahindra	Rising Star ★	Not In	Product Challenger	Leader	Not In	Rising Star ★
UST	Product Challenger	Not In	Contender	Product Challenger	Not In	Not In
Valtech	Not In	Contender	Not In	Not In	Not In	Not In
Visionet	Not In	Contender	Not In	Not In	Product Challenger	Not In
Wipro	Leader	Not In	Product Challenger	Leader	Not In	Leader
Zennify	Not In	Leader	Not In	Not In	Leader	Product Challenger
Zensar	Not In	Contender	Not In	Not In	Product Challenger	Contender

This study addresses the key focus areas for **Salesforce Ecosystem Partners 2024**.

Simplified Illustration; Source: ISG 2024

Multicloud Implementation and Integration Services for Large Enterprises

Implementation Services for Core Clouds — Midmarket

Implementation Services for Marketing Automation

Managed Application Services for Large Enterprises

Managed Application Services for Midmarket

Implementation Services for Industry Clouds

Definition

The Salesforce Ecosystem study examines various offerings of the Salesforce platform, which has been categorized into implementation services (the change business) and managed application services focusing on operational support for productive applications (the Run Business). These segments have been further categorized based on the clients they serve into large enterprise clients and the midmarket due to the significant need for Salesforce integration into the complex application landscape for large enterprise clients. Furthermore, these clients primarily have globally operating businesses that require corresponding delivery capabilities from service providers.

Expanding on the segmentation outlined above, the study also includes quadrants examining focused offerings, which are the sweet spot for pools of participants within the ecosystem and are sought after by clients.

As a yearly investigation, running for the 6th consecutive year, the study is constantly refreshed to examine the focus of innovation by Salesforce during the past period. This sometimes results in adjustments to existing quadrants or replacing a quadrant and introducing a new and more relevant topic, such as introducing the quadrant Implementation Services for Industry Clouds last year. The study refresh can also adapt our examination of existing quadrants to incorporate innovation that Salesforce introduces that improves all of its Cloud offerings, as in this year's Salesforce invigorated focus on Data, Generative AI and Trust across its entire portfolio.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following six (spell out the number of quadrants, do not use a digit) quadrants for services/solutions: Multicloud Implementation and Integration Services for Large Enterprises, Implementation Services for Core Clouds – Midmarket, Implementation Services for Marketing Automation, Managed Application Services for Large Enterprises, Managed Application Services for Midmarket and Implementation Services for Industry Clouds.

This ISG Provider Lens™ study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Multicloud Implementation and Integration Services for Large Enterprises

Multicloud Implementation and Integration Services for Large Enterprises

Who Should Read This Section

This report is relevant to large enterprises across all industries in the U.S. and evaluates Salesforce implementation and integration service providers for this client type.

In this quadrant, ISG defines the current market positioning of Salesforce multicloud implementation and integration service providers in the U.S. and assesses how they address key challenges enterprises face in the country. Over the years, Salesforce has enhanced its product approach that extends beyond CRM and its related applications, development, integration and reporting.

Enterprises are seeking smarter and more reliable business process implementations and integrations to enhance automation and process efficiency. Service providers leverage cutting-edge Salesforce AI Cloud technologies, intelligent operations and digital services to meet these demands. Enterprises are striving to become digitally transformed, AI-enabled entities amidst the emergence of GenAI. Service providers are focusing on

AI best practices, industry-specific models and seamless integration to meet enterprise-specific requirements.

ISG observed that service providers are deploying enhanced Salesforce offerings, such as Sales Cloud, Service Cloud, Experience Cloud, MuleSoft and Tableau, with integrations to several ERP and third-party applications to accelerate enterprises' digital transformation.

Marketing and sales leaders should read this report to analyze service partners' capabilities in effectively implementing Salesforce Marketing Cloud, Sales Cloud, Heroku and related solutions.

IT and technology leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce cloud services and integration and analysis solutions.

Field service managers should read this report to understand how service providers implement and expand the uses of Salesforce Service Cloud to better manage field service operations.

Security and data professionals should read this report to comprehend how providers adhere to U.S. security laws for Salesforce integration and compare practices for better understanding.

This quadrant includes providers of **implementation services for Salesforce applications and the integration of these applications** with other major standard software solutions focused on large and globally operating enterprise clients.

Rainer Suletzki

Multicloud Implementation and Integration Services for Large Enterprises

Definition

This quadrant includes providers of implementation services for Salesforce applications and their integration with other major standard software solutions. These solutions are usually part of the complex system landscape of large and globally operating enterprise clients. The scope of this study takes into consideration that these clients, in most cases, use various cloud products of the Salesforce portfolio. In many cases, the implementation is conducted as a part of a long-term program, with multiple rollouts in various divisions of the client organization and regions. From a functional perspective, implementation services include process consulting, design, configuration, data clean-up, migration and finally, go-live support.

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go live**) across all Salesforce products

2. **Deep knowledge** about the major standard software packages other than Salesforce, in addition to the ability to **implement end-to-end processes**

3. Broad **competencies in architecture** and realization of complex application landscapes

4. Availability of **predefined solutions** and accelerators, preferably both functionally oriented and industry-specific

5. Delivery **capabilities at scale** to serve large enterprise clients

6. Compelling list of **use cases and references**

Observations

In recent years, the market for Salesforce implementation and integration services has experienced continuous growth. The persistent shortage of qualified employees proficient in Salesforce expertise continues to hamper the number of implementations. The most recent growth rate decline has been easing this situation a bit. Nevertheless, with the mounting consolidation pressure in the corresponding service market, major system integrators are seeking to strengthen their workforces and enhance their portfolios by acquiring midsize providers. While this strategy does not directly create new capacities, it is still expected to persist. Many providers are also prioritizing multicloud implementations, leveraging Salesforce as a cornerstone for enterprise innovation.

The segment for large enterprise customers remains dominated by the major system integrators that continue to enhance their onshore capacities to improve customer proximity. A key focus is the upcoming integration of GenAI with Salesforce. Service providers must invest significantly to keep pace with the rapid innovation driven by this trend.

From 90 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

Accenture demonstrates impressive scale and provides a comprehensive library of predefined solutions. Its extensive MuleSoft capabilities effectively address integration requirements. The company exhibits continuous growth in North America.

Capgemini

Capgemini operates a global delivery model that serves as an asset for Salesforce-based transformations. Furthermore, its robust predefined solutions demonstrate in-depth domain expertise across various industries.

cognizant

Cognizant's portfolio includes an impressive library of best practices, core processes and underlying technologies tailored to each function within client organizations. The company continues its investments into strong growth in North America.

Customertimes

Customertimes places a strong emphasis on achieving business value in its implementations. It can already refer to productive implementations of GenAI in connection with Salesforce.

Deloitte.

Deloitte Digital structures its Salesforce portfolio around integrating and aligning business processes with technology. It operates a dedicated organizational unit that develops predefined solutions for multiple industries.

HCLTech

HCLTech offers a compelling suite of accelerators and productivity tools for most efficient Salesforce implementations. The company emphasizes data quality as an essential factor for the implementation of Salesforce applications.

IBM

IBM offers numerous functional accelerators supporting the rapid and efficient implementation of Salesforce-based applications. Furthermore, the clients benefit from a compelling co-innovation approach supported by a comprehensive methodology.

Infosys

Infosys uses numerous tools that are designed to achieve highest productivity for the implementation activities. With a large solution repository, Infosys operates a sizable MuleSoft practice offering robust integration capabilities.

Multicloud Implementation and Integration Services for Large Enterprises

TCS provides a range of substantial modular solutions and drives innovation development in collaboration with clients. With Salesforce Product Innovation as a Service (PIaaS), the company offers a powerful framework for this purpose.

Wipro has significantly expanded its employee base and coverage of functional areas over the past few years. The company is an early adopter of AI solutions and has established a GenAI CoE collaboratively with its customers.

LTIMindtree (Rising Star) offers a comprehensive set of accelerators and productivity tools that support efficient project execution. The company has comprehensive integration capabilities based on a large MuleSoft practice.

Tech Mahindra's (Rising Star) solution repository provides and maintains standardized templates to design the data architecture for its Salesforce implementations. The company exhibits strong automation capabilities.

Leader

"Infosys is a competent provider of Salesforce-related services with a comprehensive solution library and robust integration capabilities."

Rainer Suletzki

Infosys

Overview

Infosys is a global consulting and technology services provider. It specializes in architecture definition, Agile implementations, global rollout execution, ecosystem integration, platform-based application modernization and support services. Infosys operates a global practice for Salesforce-related services and has a longstanding partnership with Salesforce. The company is headquartered in Bengaluru, India. It has more than 328,700 employees across 274 offices in 56 countries. In FY23 the company generated $18.2 billion in revenue.

Strengths

Powerful productivity tools for implementation: Infosys uses numerous tools that are designed to achieve the highest productivity for implementation activities. These tools include the Agile Planner platform for project management and AgilePro, the next-generation enterprise agility platform for large enterprises. Furthermore, with iPTAP (Infosys Package Test Automation Solution), Infosys provides a highly customizable test automation solution for multiple packaged and non-packaged applications.

Well-developed integration capabilities: Infosys operates one of the largest MuleSoft practices, enabling the company to cover the most complex integration requirements of large enterprise clients.

Comprehensive solution library: Under the label Infosys Cobalt Store, Infosys operates a central library with many predefined solutions and accelerators. These assets include personalized customer journey maps and templates, industry solutions, industry reference architectures and process maps.

Compelling coverage of AI: With Infosys Topaz, the company offers a suite of services and solutions that extensively use GenAI. The company has applied an AI framework to enable cognitive solutions. Its primary focus is to help businesses accelerate innovation, operational excellence, and business value.

Caution

Infosys' rich portfolio is not easy to understand from a client's perspective. The company should invest in a structured product and solutions catalog to better present its capabilities to clients.

The strategy consulting capabilities should be further strengthened to support customers in keeping pace with the fast development of Salesforce products.

Implementation Services for Core Clouds — Midmarket

Implementation Services for Core Clouds — Midmarket

Who Should Read This Section

This report is relevant to small and midsize companies across all industries in the U.S. for evaluating providers of Salesforce implementation services for core clouds.

In this quadrant, ISG defines the current market positioning of providers of Salesforce implementation services for core clouds in the U.S. and assesses how they address key challenges enterprises face in the country. The report evaluates providers specializing in Salesforce Sales, Service, and Commerce Cloud offerings. These providers adopt an Agile approach to assist clients in redesigning processes and implementing Salesforce applications.

Enterprises seeking Salesforce core cloud implementation services prioritize cloud-based solutions with seamless third-party application integration capabilities. Unlike large enterprises, small and midsize companies seek Salesforce implementation services for core clouds for help with projects that do not have significant integration needs. These companies

offer simplified digital transformation solutions, thereby resulting in faster deployment, easy-to-use services and cost-saving benefits.

Enterprises in the U.S. are seeking quick and specialized integration of solutions. Service providers are enhancing their Salesforce expertise by hiring certified employees and training new employees to expeditiously deliver business KPIs and drive innovation across CRM processes to address client needs.

Many core cloud implementation service providers are leveraging preconfigured solutions aligned with their strategies to accelerate enterprise transformation and maximize business value through innovations.

Marketing and sales leaders should read this report to understand service providers' capabilities in implementing Salesforce Sales and Commerce Cloud and emphasizing industry-specific solutions.

IT and technology leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce cloud services and integration and analysis solutions.

Security and data professionals should read this report to comprehend how providers adhere to U.S. security laws for Salesforce integration and compare practices for better understanding.

Field service managers should read this report to understand how service providers implement and enhance Salesforce Service Cloud for improved field service operations.

ISG Provider Lens™

Source: ISG RESEARCH

Salesforce Ecosystem Partners
Implementation Services for Core Clouds — Midmarket

U.S. 2024

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

L

Jade Global
Algoworks
Apps Associates
AllCloud
Demand Blue
Marlabs

Mastek
A5
Grazitti

Coforge
Hexaware
Zennify
Birlasoft

Perficient
Persistent Systems
Coastal Cloud
Mphasis Silverline

Huron
Fast Slow Motion

Valtech
Tavant
Visionet

Zensar

Leader

Market Challenger

L   COMPETITIVE STRENGTH   H

★ Rising Star

This quadrant addresses providers that offer **implementation services** in Salesforce Sales, Service and Commerce Cloud. These providers mostly employ an agile approach for implementation and **focus on small and midsize clients.**

Rainer Suletzki

Implementation Services for Core Clouds — Midmarket

Definition

This quadrant evaluates providers that specialize in Salesforce Sales Cloud, Service Cloud, Commerce Cloud and Community Cloud. These products are broadly considered as the core clouds of Salesforce. These providers take an agile approach to implementation and focus on cases where low levels of integration are required, which is typical for mid-size and small clients. Therefore, in many cases, these projects are conducted within a few months. An important aspect of the required services revolves around consulting on the redesign of processes while using Salesforce applications. From a functional perspective, implementation services include process consulting, design, configuration, data clean-up, migration and finally the go-live support.

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go live**) for Salesforce Core Clouds (at least for Sales, Service and Commerce clouds)

2. Provision of **training and enabling client personnel** to use the application

3. Availability of **predefined solutions and accelerators**, preferably both functionally oriented and industry-specific

4. Presence of **unique differentiators**

5. Economic stability and significant **delivery capabilities** to serve numerous clients

6. Compelling list of use **cases and references**

Observations

The significant growth of the market for Salesforce implementations and the ongoing consolidation trend have gradually altered the service provider landscape. The acquisition of numerous midsize providers by large system integrators has created additional opportunities for other providers to fill capacity gaps over time. However, after multiple acquisitions, particularly in the last three years, only a handful of midsize providers of substantial size remain; most midsize providers now fall within the range of 100 to 500 staff members.

Implementations in the midmarket segment predominantly emphasize Agile methodologies and involve various cloud products, with integration requirements typically being less complex compared to those of large enterprises. Although many large system integrators primarily target large enterprises, they also operate in this segment, albeit to a lesser extent. Consequently, the evaluation primarily focuses on midsize providers that excel in this segment.

From the 90 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders and two Rising Stars.

Birlasoft

Birlasoft offers predefined packages for all relevant project phases and a sophisticated governance model supporting effective project execution. The company can facilitate Salesforce integration with respective backend systems.

Coastal Cloud

Coastal Cloud increasingly emphasizes defining tangible business results as key measures for project success. The company has increased its certified employees significantly in recent years.

Coforge

Coforge has expertise in various verticals and offers several predefined solutions for these verticals. The provider achieves high efficiency and compelling results through diligent focus on the strategy and design phases.

HEXAWARE

Hexaware follows a clear, Agile implementation methodology supported by several proprietary tools. It exhibits strong capabilities to integrate Salesforce with other enterprise platforms by using MuleSoft.

Perficient

Perficient applies Agile methods for implementing Salesforce Core Clouds to achieve the highest CX. The company operates a dedicated GenAI Innovation Group, where it partners with clients to explore GenAI opportunities.

Persistent

Persistent Systems uses a strong data-oriented implementation approach and leverages Salesforce as an enterprise platform for digital transformation. It has expanded in size and scope to effectively meet the needs of large enterprise clients.

Mphasis Silverline

Mphasis Silverline has in-depth expertise in offering Salesforce services to various industries. The provider prioritizes data management to improve implementation quality and deploys powerful automation mechanisms for increased efficiency.

zennify

Zennify has in-depth expertise in handling most functions of the financial services sector. The company has a notable MuleSoft practice for integrating Salesforce within its clients' application landscapes.

Implementation Services for Core Clouds — Midmarket

Grazitti Interactive (Rising Star) follows a clear methodology focusing primarily on continuous integration and deployment. It operates a dedicated business analyst and architect practice that addresses the early phases of a Salesforce project.

Jade Global

Jade Global (Rising Star) offers a compelling methodology for configure, price and quote (CPQ) transformation, necessary support to consolidate Salesforce instances and robust integration capabilities.

Implementation Services for Marketing Automation

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating service providers of Salesforce implementation services for marketing automation.

In this quadrant, ISG defines the current market positioning of providers of Salesforce implementation services for marketing automation in the U.S. and assesses how they address key challenges enterprises face in the country. These providers focus on helping clients deliver direct, personalized customer engagement and increase revenue through one-on-one communication at scale and across multiple channels. Knowledge about direct customer interaction through mobile devices is important in this context. Marketing automation is often the starting point for Salesforce, and ISG observes that companies seeking Salesforce implementation services typically do not have complex real-time integration needs.

Enterprises in the U.S. market are seeking martech transformation to create impactful, omnichannel customer journeys and enable real-time marketing activation. Considering this, Salesforce service providers are focusing on martech strategy and implementing a marketing technology stack to enable continuous, personalized *always-on* engagement across channels.

Unified architecture and core KPIs have been the most preferred segment for enterprises in the U.S. Service providers are enhancing their Salesforce marketing automation services with end-to-end automated business intelligence, personalized customer marketing and intelligent omnichannel delivery to meet evolving requirements. ISG observes a high demand for human-centered Salesforce Marketing Cloud based on individual needs and aligned with customer journeys.

Marketing and sales leaders should read this report to understand the implementation of Salesforce Marketing Cloud, marketing expertise, digital experience and accelerators.

IT and technology leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce cloud services and integration and analysis solutions.

Field service managers should read this report to understand providers' relative positioning in adopting Salesforce Marketing Cloud and compare technical capabilities, automation depth and development methodologies.

Security and data professionals should read this report to understand how providers adhere to U.S. security laws for Salesforce integration and compare practices for better understanding.

ISG Provider Lens™

Source: ISG RESEARCH

Salesforce Ecosystem Partners
Implementation Services for Marketing Automation

U.S. 2024
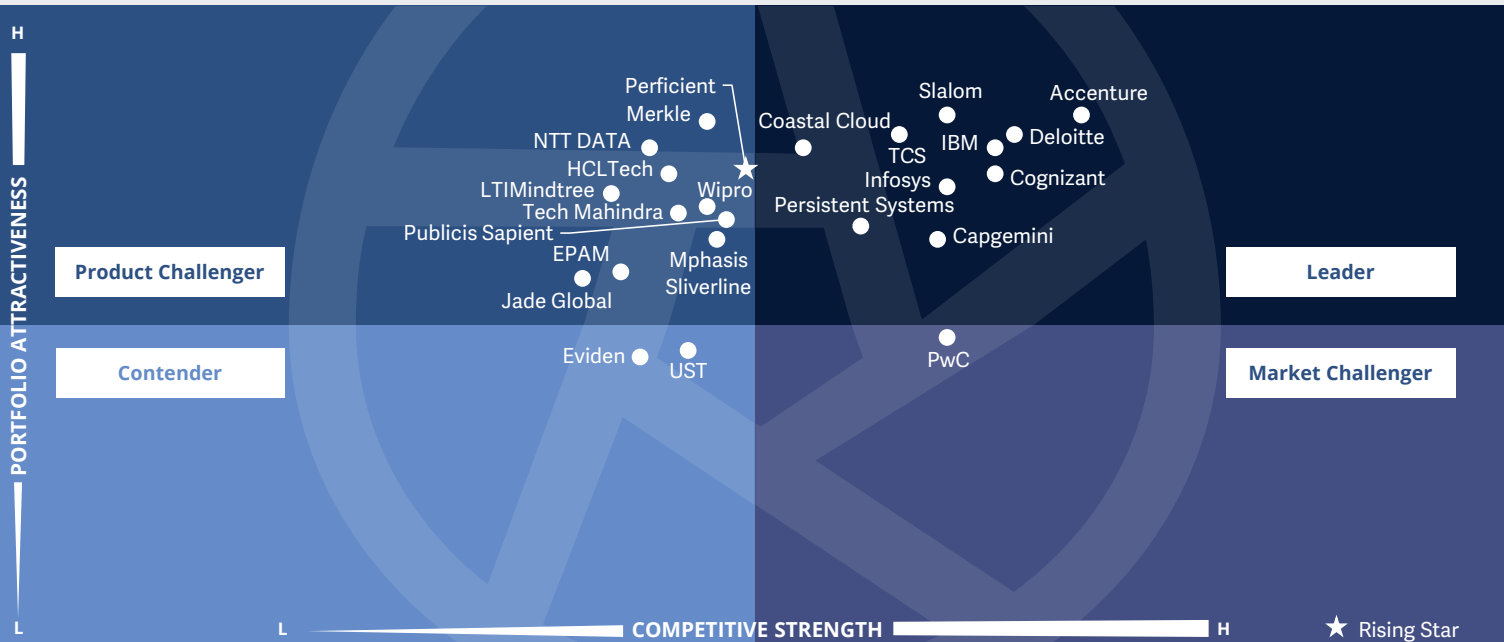
PORTFOLIO ATTRACTIVENESS

H

Perficient
Merkle
NTT DATA
HCLTech
LTIMindtree   Wipro
Tech Mahindra
Publicis Sapient
EPAM
Jade Global   Mphasis
                     Sliverline

Coastal Cloud
                TCS
            Infosys
Persistent Systems

Slalom   Accenture
        IBM   Deloitte
                Cognizant

            Capgemini

Product Challenger

Leader

Contender

Eviden
        UST

PwC

Market Challenger

L

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant addresses providers that offer **Implementation Services for Marketing Automation** for Salesforce and provide **expertise in marketing-specific aspects** such as the use of media and multichannel approaches.

Rainer Suletzki

Implementation Services for Marketing Automation

Definition

This quadrant includes providers that specialize in Salesforce Marketing Cloud for cases ranging from simple implementations, where the need for real-time integration into a complex system landscape is limited, to cases where Salesforce Marketing Cloud underpins the implementation of sophisticated eCommerce and omnichannel always-on marketing capabilities, leveraging deeper integration into the Enterprise IT landscape. In addition, provider expertise in marketing specific aspects such as the use of media and multichannel approaches is essential. As the interaction with end clients usually implies a large volume of transactions, the automation of these functionalities is another important success factor in this quadrant. From a functional perspective, the implementation services include process consulting, design, configuration, data clean-up, migration and finally the go-live support.

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go live**) for the Salesforce Marketing Cloud, Pardot, and for marketing specific aspects, such as information gathering, customer experience, digital customer journey optimization and automation of customer interactions

2. Provision of **training and enabling client personnel** to use the application

3. Availability of **predefined solutions and accelerators**, preferably both functionally oriented and industry specific Presence of **unique differentiators**

4. Economic **stability and significant delivery capabilities** to serve numerous clients

5. Compelling list of **use cases and references**

Observations

Implementation services for Salesforce Marketing Automation must consider that most marketing activities include direct interactions with the end consumers of products and services. This results in large data volumes and increased demand for fully mobile-enabled solutions. Hence, enabling solutions for those requirements is an essential capability that leading providers need to exhibit in this quadrant. Their automation capabilities with the Marketing Cloud Account Engagement (formerly Pardot) are also important success factors for such implementations.

With their strong domain expertise, some large marketing agencies can also act as important competitors for the technology-oriented providers in this market. While all large global system integrators offer comprehensive capabilities for marketing functions, some midsize service providers active in the Salesforce implementations market maintain a large marketing practice. Their certifications for the respective Salesforce products exhibit some room for future improvement.

From 90 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture offers high scalability in its marketing-related implementation projects. In cooperation with Salesforce, Accenture is investing significantly in Data Cloud-based solutions that will use generative AI for analyzing customer data.

Capgemini

Capgemini has rich experience in implementing marketing solutions using Salesforce. It has developed a set of methodologies, assets and capabilities that enable clients to deliver transformational CX engagements at scale.

Coastal Cloud

Coastal Cloud has a significant practice for the Salesforce Marketing Cloud and related products. It offers a predefined Marketing Cloud Account Engagement solution that is easy to implement and highly automated.

cognizant

Cognizant offers various predefined solutions around marketing plus managed services for CX management and marketing campaigns. The company has a strong focus on data-oriented services such as data modeling and data cleansing.

Deloitte.

Deloitte Digital has a strong record for consulting and implementing solution for the marketing function in large enterprises. The portfolio includes sophisticated consulting for data-driven marketing strategies to create a well-rounded experience.

IBM.

IBM's portfolio includes many marketing-specific accelerators and predefined solutions. With its broad portfolio of technologies, IBM has a strong customer base which is a solid foundation for the continuous growth of its Salesforce practice.

Infosys

Infosys offers several predefined industry-specific solutions for marketing automation. The portfolio puts a high emphasis on the data-related aspects of marketing automation.

Persistent

Persistent Systems applies a well-developed and flexible methodology. Automation as a critical element for high efficiency is prioritized in the implementations for marketing.

Slalom

Slalom has deep marketing expertise, especially in concept-to-commercialization, CX strategy and omnichannel commerce. The company offers an innovative Build-as-a-Service approach for implementing custom-built solutions.

Implementation Services for Marketing Automation

TCS has a compelling methodology for developing solutions that include direct interaction with customers. The integration with AI solutions is a key component of TCS´ investments in marketing-related solutions.

Perficient

Perficient (Rising Star) offers a rich portfolio that includes several predefined solutions for the marketing environment. The company puts a strong emphasis on achieving a compelling UX.

Leader

"Infosys offers a rich portfolio of solutions for marketing automation with a strong focus on data management and cost optimization."

Rainer Suletzki

Infosys

Overview

Infosys is a global consulting and technology services provider. It specializes in architecture definition, Agile implementations, global rollout execution, ecosystem integration, platform-based application modernization and support services. Infosys operates a global practice for Salesforce-related services and has a longstanding partnership with Salesforce. The company is headquartered in Bengaluru, India. It has more than 328,700 employees across 274 offices in 56 countries. In FY23 the company generated $18.2 billion in revenue.

Strengths

Comprehensive methodology for implementing marketing automation: Infosys uses numerous solution reference architecture templates in its marketing-related implementation projects. These assets include Marketing Cloud Engagement, Marketing Cloud Personalization and Account Engagement.

Strong focus on data management: The portfolio emphasizes the data-related aspects of marketing automation. Services include data collection, cleansing and quality management in general, which is important because the data volume is usually very high in marketing. Data volume management is focused on optimizing license costs. GenAI capabilities are used in this context in a compelling manner. Beyond the technical aspects, Infosys offers to establish a well-defined data governance and compliance model in cooperation with the respective client.

Multiple predefined solutions: Infosys offers several predefined industry-specific solutions for marketing automation, such as for manufacturing, retail and telco. For the post-implementation phases, compelling as-a-service solutions are available for campaign management or creating and maintaining customer journeys. These solutions comprise a comprehensive set of service portfolio elements that can be combined by the client specifically for single projects.

Caution

Based on its strong focus on data management, Infosys should extend its offerings for marketing-related reporting.

The data-related integrations with third-party solutions can be further expanded, potentially provided in an as-a-service mode.

Managed Application Services
for Large Enterprises

Managed Application Services for Large Enterprises

Who Should Read This Section

This report is relevant to large enterprises across all industries in the U.S. for evaluating Salesforce managed application service providers.

In this quadrant, ISG defines the current market positioning of providers of Salesforce managed application services for large enterprises in the U.S. This study covers providers offering additional services, including administrative assistance, accelerators for development and utilization, development services, proactive monitoring and advisory services.

Conventional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring. Enterprise clients seek service providers that can keep IT costs under control and maintain the Salesforce platform efficiently to skillfully manage their Salesforce environments.

Enterprises are focused on gaining insights into the health of their Salesforce instances to make informed decisions for further enhancements and optimizations and maximize their Salesforce investment value. Service providers are offering proprietary application managed solutions that can effectively manage, support, enhance and maintain Salesforce applications within organizations.

ISG has observed that enterprises want to achieve operational resilience, operate consistently and deliver better solutions with Salesforce. Service providers focus on Salesforce managed services that emphasize business observability, UX, resilience and automation to meet enterprises' demands.

Marketing and sales leaders should read this report to effectively analyze service partners' capabilities in administration assistance, accelerators, proactive monitoring and advisory services.

IT and technology leaders should read this report to better understand managed service providers' capabilities and compare their technical expertise in remote and onsite monitoring.

Field service managers should read this report to understand how service providers implement and expand the Salesforce Service Cloud use to better manage field service operations.

Security and data professionals should read this report to understand how providers adhere to U.S. security laws for Salesforce integration and compare practices for better understanding.

ISG Provider Lens™

Salesforce Ecosystem Partners
Managed Application Services for Large Enterprises

Source: ISG RESEARCH

U.S. 2024

PORTFOLIO ATTRACTIVENESS

H

L

Product Challenger

Contender

Persistent Systems
Slalom
UST ● Eviden
NTT DATA
Customertimes

Brillio

HCLTech
TCS Infosys Cognizant
Wipro
LTIMindtree
Accenture
Capgemini

Tech Mahindra

EPAM
CGI

IBM

Deloitte

Fujitsu

PwC

Leader

Market Challenger

L   COMPETITIVE STRENGTH   H

★ Rising Star
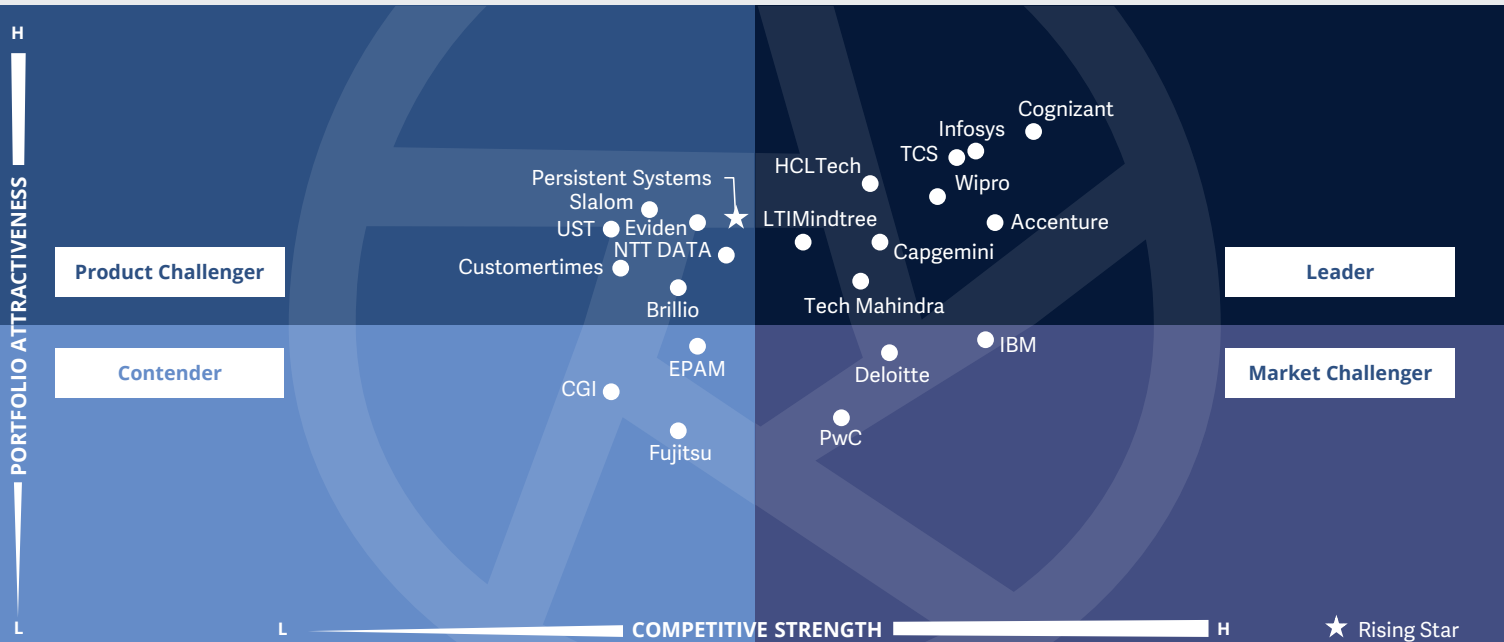
This quadrant assesses the capabilities of providers to offer **managed application services** for Salesforce instances focused on **large enterprise clients** with global reach and **complex application landscapes**.

Rainer Suletzki

Managed Application Services for Large Enterprises

Definition

This quadrant evaluates providers with the capability to offer managed services for maintenance and support functions that include monitoring, remote support, centralized management of Salesforce applications, data quality management, data security and compliance-related aspects. In the case of large enterprise clients, this usually includes the providers' capability to offer these services in the context of global reach and complex application landscapes, which comprise a variety of solutions from different software providers. Another important aspect is the continuous improvement of the solutions to generate additional value for the underlying business. Managed services are characterized by the transfer of responsibilities to a service provider and are driven according to defined SLAs.

Eligibility Criteria

1. Well-proven experience in operational support for end-to-end processes across **complex application landscapes**, with a specific focus on Salesforce products

2. Availability of **strong methodology** and comprehensive tool support with a high degree of automation

3. **Delivery capabilities** at scale to serve large enterprise clients

4. Provision of **mature pricing and contract models** with focus on outcome-based approaches and continuous improvement

5. Compelling list of **use cases and references**

Observations

The positioning of providers offering managed application services for large enterprises is further reinforced by their ability to address integration needs within complex application environments. As a result, large system integrators dominate this market by specializing in offering comprehensive support for end-to-end processes spanning multiple software packages. These end-to-end capabilities must also encompass the diverse products of ISVs, which are widely utilized by large enterprises for functionalities not included in standard Salesforce offerings. Large enterprises previously prioritized cost efficiency and now seek to optimize underlying business processes and attain additional value beyond technology-driven aspects. Since many clients find their Salesforce license costs quite high, there is a significant demand for consulting services to optimize license usage to reduce associated expenses.

From the 90 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders and one Rising Star.

accenture

Accenture's expertise in all major application software packages enables it to offer end-to-end application services. It utilizes comprehensive and highly scalable automation mechanisms to achieve increased cost and quality efficiency.

Capgemini

Operating in a global delivery model, **Capgemini** relies on a strong workforce that includes onshore, nearshore and offshore staff. Beyond pure technology support, Capgemini offers business process-as-a-service (BPaaS).

cognizant

Cognizant's portfolio includes various powerful tools specifically designed to support Salesforce applications. It offers several services that help Salesforce clients optimize their license volume and related costs.

HCLTech

With a comprehensive and well-structured product and service catalog, **HCLTech** runs a global delivery model capable of offering cost-efficient application services. The company already offers multiple services in an As-a-Service mode.

Infosys

Infosys' portfolio includes a variety of tools for supporting efficient application management. It also offers bundling of Salesforce licenses and related services.

LTIMindtree

LTIMindtree's application management portfolio has a clear focus on sophisticated system landscapes. In the project methodology, data quality measurement is a key element in the company's business performance assessment.

TCS — TATA CONSULTANCY SERVICES

TCS has a comprehensive application management portfolio that includes monitoring, self-service experience integration and test automation. Unlike many competitors, the company focuses on organic growth instead of acquisitions.

TECH mahindra

Tech Mahindra's Salesforce service support model heavily relies on automation and highly standardized procedures to attain substantial productivity enhancements and operational stability. It provides support and maintenance services with adaptable pricing structures.

Managed Application Services for Large Enterprises

Wipro uses various tools to increase application management efficiency. Data management and CX are key points of emphasis.

Persistent

Persistent Systems (Rising Star) offers multiple configuration options in a dedicated or shared resource model. The company already has several GenAI use cases for managed application services.

Infosys

Leader

"Infosys is a highly competent partner for the management of Salesforce-based applications, offering powerful solutions and tools for the system landscapes of large enterprise clients."

Rainer Suletzki

Overview

Infosys is a global consulting and technology services provider. It specializes in architecture definition, Agile implementations, global rollout execution, ecosystem integration, platform-based application modernization and support services. Infosys operates a global practice for Salesforce-related services and has a longstanding partnership with Salesforce. The company is headquartered in Bengaluru, India. It has more than 328,700 employees across 274 offices in 56 countries. In FY23 the company generated $18.2 billion in revenue.

Strengths

Focus on operational stability: Using automation capabilities to achieve good business process stability and high cost-effectiveness is a key characteristic of Infosys' managed application services. Infosys conducts regular audits and code quality assessments in its engagements, aiming to continuously improve its services.

Mature and flexible pricing model: Infosys offers many options for client contracts. For instance, agreements can be based on business platform subscription, ticket volume or business outcome. Infosys also offers bundling of Salesforce licenses and related services. The company's share of engagements on a fixed-price base or on an outcome base is high, indicating its willingness to take co-responsibility for results.

Powerful application management tools: Infosys has a variety of tools supporting efficient application management. The central component is the Infosys Live Enterprise Application Management Platform, which includes a business command center, real-time monitoring components, chatbots for incident management and more. Other offerings include Code Coverage Manager and the Sandbox Manager, which supports parallel management of several Salesforce instances.

Strong operational model: Infosys operates a global delivery organization with several U.S. delivery centers to offer a blend of onshore and offshore resources.

Caution

Infosys should further strengthen its governance model so clients can better manage ongoing maintenance and upcoming enhancements.

With its Salesforce expertise, Infosys should extend its offerings for license optimization because license costs have become a challenge for companies using Salesforce.

Managed Application Services for Midmarket

Managed Application Services for Midmarket

Who Should Read This Section

This report is relevant to small and midsize enterprises across all industries in the U.S. and evaluates providers of Salesforce managed application services for this client type.

In this quadrant, ISG defines the current market positioning of providers of Salesforce managed application services for small and midsize companies in the U.S. Traditional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring. This study covers providers offering additional services, including administrative assistance, accelerators for development and utilization, development services, proactive monitoring and advisory services.

Enterprises in the U.S. market are seeking seamless Salesforce performance, proactive enhancements, multilingual support and interface monitoring. Responding to clients' needs, service providers are focusing on offering end-to-end application management

solutions combined with automation-led sustainable cost takeout framework with value-driven transformation.

ISG observed that service providers are expanding their Salesforce offerings to meet enterprise demands and integrating new products and solutions via strategic partnerships and acquisitions to provide comprehensive Salesforce-related solutions on the platform.

Service providers in the U.S. are introducing advanced AI platforms and emphasizing GenAI, AI, ML and automation to deliver rapid and optimal managed application solutions tailored to enterprises' needs.

Marketing and sales leaders should read this report to effectively analyze and highlight service providers' capabilities in implementing Salesforce managed application services.

Field service managers should read this report to understand how service providers implement and expand the Salesforce Service Cloud use to better manage field service operations.

IT and technology leaders should read this report to compare providers' technical expertise, including monitoring, accelerators, incident response, automation and development methodologies.

Security and data professionals should read this report to understand how providers adhere to U.S. security laws for Salesforce integration and compare practices for better understanding.

ISG Provider Lens™

Salesforce Ecosystem Partners
Managed Application Services for Midmarket

U.S. 2024

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

L

Jade Global
Demand Blue
Apps Associates
Marlabs
Algoworks
Visionet
Zensar

Persistent Systems
Hexaware
Coforge
Mphasis Silverline
Perficient
Zennify
Birlasoft
Grazitti

Leader

Market Challenger

A5
Tavant
AllCloud

Fast Slow Motion
Huron

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant assesses the capabilities of providers to offer **managed services for Salesforce applications, mainly for midmarket clients,** which in many cases have a regional focus rather than a global one.

Rainer Suletzki

Managed Application Services for Midmarket

Definition

This quadrant focuses on the capability of providers to offer managed services for maintenance and support functions that include monitoring, remote support, centralized management of Salesforce applications, data quality management, data security and compliance-related aspects. The midmarket clients usually have lower integration requirements than large enterprises and in many cases, a more regional focus. Another important aspect is the continuous improvement of the solutions to generate additional value for the underlying business. Managed services are characterized by the transfer of responsibilities to a service provider and are driven according to defined SLAs.

Eligibility Criteria

1. Well-proven experience in **operational support for application landscapes** with specific focus on Salesforce products

2. Availability of **strong methodology and comprehensive** tool support, along with a high degree of automation

3. Economic **stability and significant delivery capabilities** to serve numerous clients

4. Provision of **mature pricing and contract models** with a focus on outcome-based approaches and continuous improvement

5. Compelling list of **use cases and references**

Managed Application Services for Midmarket

Observations

From a functional standpoint, managed application services focused on SaaS products like Salesforce are less intricate than traditional on-premises products. This is because the software vendor Salesforce handles a significant portion of application management by itself. While Salesforce oversees all platform-related aspects such as database management and performance management, service providers offer support for upgrades, data volume and license management, user training and, when necessary, management of various interfaces. Due to this narrower scope, some midsize providers prioritize implementation services over managed application services. In contrast to the large enterprise segment, the demand for end-to-end processes across platforms is less critical for midsize clients, because in many cases their application landscapes are less complex.

From the 90 companies assessed for this study, 21 qualified for this quadrant, with eight being Leaders and one Rising Star.

Birlasoft

Birlasoft offers the entire spectrum of application support for Salesforce. In ongoing engagements, the service performance is continuously monitored and reported to clients.

Coforge

Managed application services from **Coforge** combine a comprehensive portfolio with a flexible support model. Coforge has invested significantly in its Salesforce practice in recent years.

Grazitti Interactive offers full-scope managed application services for Salesforce covering upgrade support, maintenance, monitoring and continuous optimization. The company operates a dedicated QA practice that helps to ensure smooth system operation.

HEXAWARE

Hexaware offers an outcome-based application management services (AMS) solution for Salesforce that encompasses continuous integration and continuous development management.

Perficient

In its engagements, **Perficient** takes multiple measures to ensure high data quality and reliable system operation. Cost efficiency is achieved by incorporating nearshore capabilities into the engagements.

Persistent

Persistent Systems' managed application service offering encompasses all relevant components and gives clients various configuration options, whether in a dedicated or shared resource model.

Mphasis Silverline

Mphasis Silverline presents predefined packages for application services that enable clients to choose scope, resource allocation, service levels and standardized definitions. These service elements encompass the entire spectrum of application management.

zennify

In the managed application services space, **Zennify** offers a compelling application management methodology and proactive platform monitoring. Its services focus on enhancements and incremental improvements.

Jade Global

Jade Global's (Rising Star) managed application services follow a detailed model covering dimension improvement, operation, and automation. Jade Global employs dedicated teams to deliver its application services.

Implementation Services for Industry Clouds

Implementation Services for Industry Clouds

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating service providers offering implementation services for industry clouds.

In this quadrant, ISG defines the current market positioning of service providers in the U.S. and identifies how key challenges associated with implementing Salesforce industry clouds are being addressed in the country. This quadrant includes implementation service providers that are focused on Salesforce industry clouds, such as Financial Services Cloud and Health Cloud. Industry-specific skills and appropriate accelerators are important success factors for this segment. From a functional perspective, implementation services include process consulting, design, configuration, data clean-up, migration and go-live support. Furthermore, support for optimizing license costs is an important success factor for service providers in this context.

In the U.S., service providers have developed significant expertise to implement Salesforce industry clouds, build solutions and accelerators, and use them across financial services, manufacturing, automobiles, healthcare and consumer goods sectors, with enterprises prioritizing expertise and accelerators over other parameters.

ISG observed that enterprises can attain quicker and more cost-effective business results by adopting digital-first processes and industry-specific data models. Service providers assist in accelerating digital transformation through tailored Salesforce industry clouds solutions in sectors such as banking, insurance, healthcare, manufacturing and communications.

Marketing and sales leaders should read this report to effectively analyze service partners' capabilities around Salesforce industry clouds.

Field service managers should read this report to understand how service providers implement and expand Salesforce industry clouds use to better manage field service operations.

IT and technology leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce industry clouds services and integration and analysis solutions.
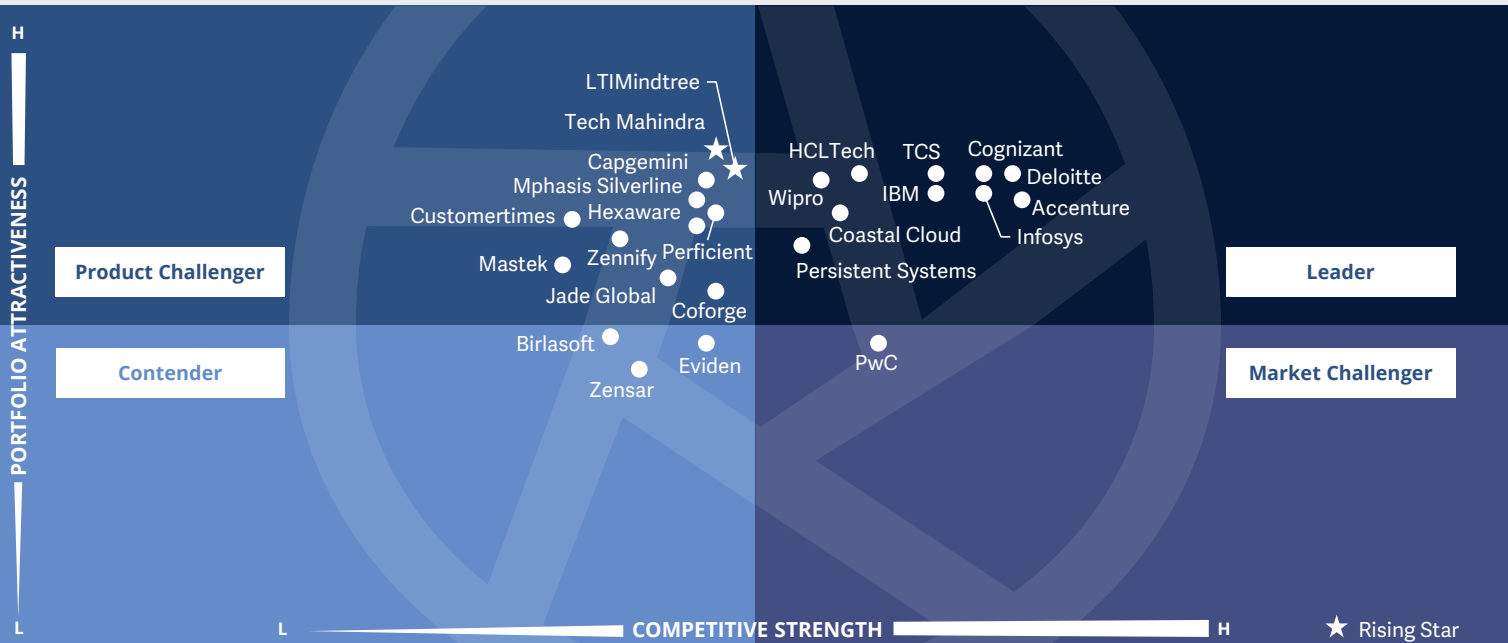
Security and data professionals should read this report to understand how providers adhere to U.S. security laws for Salesforce integration and compare practices for better understanding.

ISG Provider Lens™

Source: ISG RESEARCH

Salesforce Ecosystem Partners
Implementation Services for Industry Clouds

U.S. 2024

PORTFOLIO ATTRACTIVENESS

H

LTIMindtree
Tech Mahindra
Capgemini
Mphasis Silverline
Customertimes   Hexaware
Mastek   Zennify   Perficient
Jade Global   Coforge
Birlasoft
Zensar   Eviden

HCLTech   TCS   Cognizant
Wipro   IBM   Deloitte
Coastal Cloud   Accenture
Persistent Systems   Infosys

PwC

Product Challenger

Contender

Leader

Market Challenger

L

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant assesses providers offering implementation services for **Salesforce's Industry Cloud products**. Industry-specific **skills and appropriate accelerators** are essential success factors for this segment.

Rainer Suletzki

Implementation Services for Industry Clouds

Definition

This quadrant includes providers of implementation services that are focused on Industry Cloud products of Salesforce such as Financial Services Cloud and Health Cloud. Industry-specific skills and appropriate accelerators are important success factors for this segment. Furthermore, service providers need the capability to develop comprehensive solutions based on the various Salesforce products that are relevant in a particular client situation. With Salesforce continuing to move its offerings toward higher verticalization, this topic is high priority in numerous new implementations. From a functional perspective, the implementation services include process consulting, design, configuration, data clean-up, migration, and finally go-live support.

Eligibility Criteria

1. Well-proven **domain expertise** for respective industries

2. Strong implementation capabilities (**consulting, configuration, data migration, go live**) for the Salesforce Industry Cloud products and the products provided by Vlocity (recently taken over by Salesforce)

3. Deep knowledge of the **Salesforce data architecture**

4. Presence of **unique differentiators**, for example, proven industry-specific accelerators

5. Economic **stability and significant delivery capabilities** to serve numerous clients

6. Compelling list of **use cases and references**

Observations

The Salesforce implementation market is undergoing a significant transformation following Salesforce's introduction of its verticalization strategy. This initiative began a few years ago with the introduction of industry-specific products, including the Financial Services and Health Cloud. Salesforce's acquisition of Vlocity has solidified these capabilities and become the cornerstone of Salesforce's accelerated shift toward more industry-specific offerings. Presently, Salesforce offers several industry-specific clouds, all built on the Customer360 platform. The market is relatively nascent, with only a few clients embracing this new approach vigorously. Whether this shift will gain widespread acceptance shift remains uncertain due to additional license requirements and associated costs. Nonetheless, service providers must heavily invest in industry expertise and the corresponding products Salesforce offers. In transformation projects, conducting a comprehensive assessment to determine the best-suited products for each client's specific situation is imperative.

From 90 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

Accenture has long-term experience with its industry-specific solutions based on Salesforce. It possesses in-depth knowledge of business processes in many industries, enabling a seamless transformation from respective requirements to technical implementation.

Coastal Cloud

Coastal Cloud is well-prepared for the expected growth in the Salesforce Industry Clouds market. The provider pays attention to data migration and takes additional measures to safeguard data quality.

cognizant

Cognizant brings rich experience in providing industry-specific solutions on the Salesforce platform. It maintains a close partnership with Salesforce, engaging in collaborative product development.

Deloitte.

Deloitte Digital's portfolio focuses on industries and their specific requirements. The provider is capable of developing and implementing agile and flexible solutions.

HCLTech

HCLTech offers implementation expertise and predefined solutions across multiple industries. The company invests significantly in achieving high certification levels from Salesforce for the Industry Cloud products.

IBM.

IBM offers multiple predefined industry-specific solutions using Salesforce Industry Cloud products. IBM combines Salesforce-related offerings with complementary cloud and advanced AI technologies.

Infosys®

Infosys has deployment experience across industry verticals and possesses additional expertise in numerous ISV offerings. The company has developed many reusable GenAI industry use cases.

Persistent

Persistent Systems focuses on industry-specific solutions and achieves high project efficiency through numerous accelerators. The company has longstanding experience as Salesforce's product development partner.

tcs TATA CONSULTANCY SERVICES

TCS offers a comprehensive solution framework with a strong focus on industry-specific implementations. The company's Salesforce practice has shown significant and primarily organic growth in recent years.

Implementation Services for Industry Clouds

Wipro's portfolio includes a comprehensive library of accelerators and predefined solutions for diverse industries. Wipro has a long-standing partnership with Salesforce, covering product development and other areas.

LTIMindtree (Rising Star) boasts of a robust accelerator portfolio tailored to various industry requirements. With its large MuleSoft practice, the company provides comprehensive integration capabilities.

Tech Mahindra (Rising Star) provides predefined solutions tailored to diverse industries. The company holds notable certifications, which attests to its success in offering industry-specific solutions.

Leader

"Infosys combines deep industry expertise with profound implementation capabilities for the Salesforce Industry Cloud products."

Rainer Suletzki

Infosys

Overview

Infosys is a global consulting and technology services provider. It specializes in architecture definition, Agile implementations, global rollout execution, ecosystem integration, platform-based application modernization and support services. Infosys operates a global practice for Salesforce-related services and has a longstanding partnership with Salesforce. The company is headquartered in Bengaluru, India. It has more than 328,700 employees across 274 offices in 56 countries. In FY23 the company generated $18.2 billion in revenue.

Strengths

Investments into GenAI-enabled solutions: Infosys has recently developed many reusable GenAI industry use cases such as creative marketing content generation and customer support.

Large network of ISVs supporting Salesforce-based solutions: Infosys maintains partnerships with many ISVs that provide leading solutions based on the Salesforce platform, such as Apttus for CPQ, nCino for financial services and DocuSign for document and contract management.

Focus on CX: Infosys strongly focuses on achieving high CX by conducting detailed design and blueprinting sessions, including change management as a part of its end-to-end transformation services.

Strong industry-specific offerings: Infosys Cobalt is a comprehensive solution library with multiple industry-specific reference architectures, process maps and configurations, such as those for the healthcare, manufacturing, and automotive industries. The company's focus on verticals is continuously strengthened in line with Salesforce's recent verticalization move. Furthermore, Infosys has longstanding experience with Vlocity solutions, which is now at the core of the Salesforce verticalization strategy following Vlocity's acquisition by Salesforce.

Caution

Infosys should use its deep understanding of the Salesforce products for license optimization offerings that specifically address clients' decision process between the Salesforce Industry Clouds and functional products such as Sales Cloud and Service Cloud.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Customer Experience (CX) Insights

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Salesforce Ecosystem Partners**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Human Resources

Region

▲ **Most satisfied**
Australia/New Zealand

▼ **Least satisfied**
Asia

Industry

▲ **Most satisfied**
Public sector

▼ **Least satisfied**
Oil and Gas

Industry Average CX Score

80.5

▲ Highest CX: 92
▼ Lowest CX: 60

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 380

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	53.4%
Nearshore	19.1%
Offshore	27.5%

Appendix

The ISG Provider Lens 2024 – Salesforce Ecosystem Partners study analyzes the relevant software vendors/service providers in the U.S. Market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of February 2024 , for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Salesforce Ecosystem Partners market

2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. Use of Star of Excellence CX-Data

6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.

7. Use of the following key evaluation criteria:

   * Strategy & vision

   * Tech Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * CX and Recommendation

Author & Editor Biographies

Lead Author

Rainer Suletzki
Lead Analyst

Rainer Suletzki brings more than 30 years of experience in various IT Management functions within a global German Life Science corporation. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution. Currently he acts as independent consultant in various projects at ISG with focus upon application management for SAP, specifically for SAP HANA, and for Salesforce. This includes ISG Provider Lens™ studies as well as various projects supporting companies in defining IT strategies and the corresponding sourcing decisions.

Enterprise Context and Global Overview Analyst

Puranjeet Kumar
Senior Research Analyst

Puranjeet Kumar is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Next-Gen ADM Solutions & Services and Salesforce Ecosystem. He supports the lead analysts in the research process and authors the global summary report, focal points and quadrants reports. Puranjeet also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Prior to this role, he worked across several syndicated market research firms and has more than eight years of experience in research and consulting, with major areas of focus in collecting, analyzing, and presenting quantitative and qualitative data. His area of expertise lies across various technologies like application development, analytics, and salesforce ecosystem.

Author & Editor Biographies

Study Sponsor

Aman Munglani
**Director Ecosystem Studies,
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A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews. He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.

IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

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