

***ISG** Provider Lens™

Salesforce Ecosystem Partners

US, 2020

Quadrant Report

A research report
comparing provider
strengths, challenges
and competitive
differentiators.

April 2020

Customized report courtesy of:



About this Report

Information Services Group, Inc. is solely responsible for the content of this report.

Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by and are the sole property of Information Services Group, Inc.

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 2020 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.

The lead author for this report is Rainer Suletzki. The editor is Jan Erik Aase. The research analyst are Phani K R and Rahul Basu and the data analyst is Vishal Kulkarni.



ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under [ISG Provider Lens™](#).



ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +49 (0) 561-50697537 or visit research.isg-one.com.



- 1** Executive Summary
- 3** Introduction
- 13** Implementation and Integration Services
- 18** Implementation Services for Core Clouds
- 24** Implementation Services for Marketing Cloud
- 28** Managed Application Services
- 32** Methodology

© 2020 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.



EXECUTIVE SUMMARY

The Salesforce Ecosystem and Its Structure

Since the company was founded in 1999, Salesforce has shown significant growth and is currently the world's leading provider of cloud-based customer relationship management (CRM) functionality as a service (SaaS). From the outset, the company has been focused on agile implementation and a high level of standardization, which, in turn, compels it to issue frequent application updates. Furthermore, this helps clients complete rapid implementations that can start with limited functional scope and be enhanced over time. Meanwhile, the continuous updates on the software has led to a variety of products being offered. Starting with Sales Cloud and Service Cloud, that are undoubtedly the most mature products, the Salesforce portfolio encompasses numerous other products. Some of these products, such as Community Cloud or the Commerce Cloud, are focused on specific functionalities, while others, such as Financial Services Cloud or the Health Cloud, are focused on particular industries.

For the implementation and operation of Salesforce-based applications, most companies have to solicit the capabilities of service providers because they often do not have sufficient in-house knowledge or capacity. While selecting an appropriate provider, it's important to consider that the complexity of the underlying application system landscape tends to increase with the size of the company. An additional dimension to this complexity appears when real global system design and rollout are required. Hence, in most cases, large enterprise customers prefer providers that have strong integration capabilities and are working on a global scale, using, for example, major system integrators. Frequently this goes alongside the need to consolidate multiple isolated Salesforce instances that have already been growing over a period of time, primarily driven by the businesses themselves

without the involvement of respective IT divisions. And finally, providers in this field need to offer appropriate capabilities in other common software packages. All of this leads, in contrast to the pure agile approaches that were applied in most early Salesforce projects, to an implementation methodology that is a combination of agile elements for the implementation phases with phase-oriented elements in terms of strategy, design and rollout. The common term for this approach is hybrid agile.

The pure agile approaches are suitable for small and midsize companies with limited global presence or for those cases where an implementation is required within a global company's subsidiaries that have limited scope. For this segment, integration and consolidation is not as important as for the large companies with a global presence and that require major system integrators. In this case, midsize service providers that focus on Salesforce only and on agile implementations have an important share of the market. These providers are often referred to as boutique providers.

Within this report, the two main categories of providers explained above are to a large extent associated with different quadrants (see the description in the introduction section below).

Another important trend in the Salesforce ecosystem, in the recent years, is ongoing consolidation. This is primarily reflected in the various acquisitions that took place with large system integrators in the U.S. market acquiring boutique providers. One important reason for this trend is the need among system integrators for fast growth of their own workforce to meet the increasing demand for a myriad of services. In addition, the

system integrators enrich their methodologies by bringing in the agile mindset that is characteristic of most boutique providers. However, it is a challenge to merge the two different cultures within one organization, which is indicated by the fact that, in many cases, the acquired companies continue to operate under their own labels and are not integrated into the acquirer's company.

For all providers, irrespective of them being system integrators or boutique providers, a strong network of partnerships with independent software vendors (ISVs) within the Salesforce ecosystem is highly important. The primary reason for this is that industry-specific requirements or extended requirements for particular functions, such as configure-price-quote (CPQ), quite often, go beyond the standardized scope of Salesforce products alone. Hence, if services providers want to cover these bases by implementing reusable solutions, instead of individual products, they need to utilize the offerings of the ISVs. These solutions are usually offered as independent products with separate licensing models that need to be considered when assessing the potential costs of a Salesforce-based application. Salesforce runs a specific web-based store for these solutions, called AppExchange Store, that provides comprehensive information about ISVs and their products (usually called apps). Salesforce ensures that the apps meet basic software quality measures, maintenance cycles and compatibility with Salesforce products, among other requirements.



Introduction

Simplified illustration



Source: ISG 2020

Definition

The Salesforce Ecosystem study examines various offerings around the Salesforce platform. It analyzes providers that act as implementation partners for Salesforce and design, configure and implement solutions for clients using this platform. Within this group, a distinction has been made between providers that, apart from Salesforce-related knowledge, are also capable of integrating Salesforce-based solutions into major system landscapes (system integrators) and the providers that specialize in the implementation of Salesforce. Furthermore, the study analyzes providers that offer services to support customers in the operation of the implemented Salesforce solutions (managed application services).

Definition (cont.)

The ISG Provider Lens™ study offers the following to the IT-decision makers:

- Transparency in the strengths and weaknesses of relevant providers
- A clear picture of the differentiated positioning of providers by segments
- A focus on different markets, including the U.S., Germany and Brazil.

Our study serves as the foundation for important decision-making based on positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also leverage information from these reports to evaluate current vendor relationships and potential engagements.

Scope of the Report

This study examines various offerings around the Salesforce platform for the U.S. market. It covers four distinct market segments evaluating the most significant service providers and primary Salesforce partners registered in the Salesforce AppExchange portal.

The Implementation and Integration Services quadrant addresses the providers offering implementation services for Salesforce applications as well as the integration of these applications with major standard software solutions that are usually a part of the sophisticated system landscape of large enterprise customers operating globally. These services include consulting, configuration and implementation of respective applications for a client, integration within a customer's system landscape, data migration and go-live support.

Definition (cont.)

The Implementation Services for Core Clouds quadrant encompasses providers that are highly specialized in Salesforce sales, service and commerce cloud and take an agile approach for implementation. An important aspect of the service provided revolves around consulting on the redesign of processes while using Salesforce applications. These providers are best suited for projects that do not have major integration needs, and typically involve medium-size and small customers.

The Implementation Services for Marketing Cloud quadrant includes providers that are highly specialized in this specific Salesforce product. In addition, the providers included in this quadrant possess deep knowledge of marketing-specific aspects such as the use of media and multi-channel approaches for information gathering, customer experience and digital customer journey optimization. In this specific context of marketing, the need for real-time integration into a sophisticated system landscape is limited.

The Managed Application Services quadrant covers 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.

The following evaluation criteria apply to all the segments:

- Technology competency
- Delivery capabilities
- Use cases
- Unique differentiators
- Economic stability
- Market position

The three implementation-oriented segments are additionally based on the following criteria:

- Predefined solutions, accelerators and templates
- Partnerships

The following additional criteria are applicable for the operational support services segment:

- Maturity of delivery and contract models
- Experience with support for Salesforce-based applications
- Broad customer base

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

Market Challenger

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders.” Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the “rising stars” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “rising stars” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Salesforce Ecosystem Partners - Quadrant Provider Listing 1 of 3

| | Implementation and Integration Services | Implementation Services for Core Clouds | Implementation Services for Marketing Cloud | Managed Application Services |
|------------------|---|---|---|------------------------------|
| 7Summits | ● Not In | ● Product Challenger | ● Not In | ● Not In |
| Accenture | ● Leader | ● Not In | ● Not In | ● Leader |
| Acumen Solutions | ● Not In | ● Leader | ● Leader | ● Not In |
| Appirio | ● Market Challenger | ● Leader | ● Market Challenger | ● Leader |
| Atos | ● Contender | ● Not In | ● Not In | ● Product Challenger |
| Birlasoft | ● Product Challenger | ● Rising Star | ● Not In | ● Product Challenger |
| Bluewolf | ● Product Challenger | ● Leader | ● Leader | ● Not In |
| Capgemini | ● Leader | ● Not In | ● Not In | ● Leader |
| CGI | ● Contender | ● Not In | ● Not In | ● Contender |
| Cloudity | ● Not In | ● Contender | ● Not In | ● Not In |
| Coastal Cloud | ● Not In | ● Product Challenger | ● Product Challenger | ● Not In |
| Cognizant | ● Leader | ● Not In | ● Not In | ● Leader |

Salesforce Ecosystem Partners - Quadrant Provider Listing 2 of 3

| | Implementation and Integration Services | Implementation Services for Core Clouds | Implementation Services for Marketing Cloud | Managed Application Services |
|------------------------|---|---|---|------------------------------|
| DEG, an Isobar Company | ● Not In | ● Not In | ● Leader | ● Not In |
| Deloitte | ● Leader | ● Not In | ● Not In | ● Not In |
| EPAM | ● Contender | ● Market Challenger | ● Not In | ● Contender |
| Fujitsu | ● Market Challenger | ● Not In | ● Not In | ● Not In |
| Globant | ● Contender | ● Not In | ● Not In | ● Not In |
| HCL | ● Product Challenger | ● Not In | ● Not In | ● Leader |
| Hexaware | ● Not In | ● Rising Star | ● Not In | ● Product Challenger |
| Huron | ● Not In | ● Contender | ● Contender | ● Contender |
| Infosys | ● Leader | ● Not In | ● Not In | ● Leader |
| LTI | ● Product Challenger | ● Not In | ● Not In | ● Rising Star |
| Magnet360 | ● Product Challenger | ● Leader | ● Leader | ● Leader |
| NTT DATA | ● Leader | ● Not In | ● Not In | ● Leader |

Salesforce Ecosystem Partners - Quadrant Provider Listing 3 of 3

| | Implementation and Integration Services | Implementation Services for Core Clouds | Implementation Services for Marketing Cloud | Managed Application Services |
|--------------------|---|---|---|------------------------------|
| OSF Digital | ● Not In | ● Not In | ● Product Challenger | ● Not In |
| Perficient | ● Contender | ● Product Challenger | ● Not In | ● Not In |
| Persistent | ● Not In | ● Leader | ● Product Challenger | ● Product Challenger |
| Polsource | ● Not In | ● Product Challenger | ● Product Challenger | ● Product Challenger |
| PwC | ● Leader | ● Not In | ● Not In | ● Not In |
| Relation Edge | ● Not In | ● Contender | ● Not In | ● Not In |
| Silverline | ● Not In | ● Product Challenger | ● Contender | ● Not In |
| Slalom | ● Product Challenger | ● Leader | ● Leader | ● Not In |
| TCS | ● Leader | ● Not In | ● Not In | ● Leader |
| Tech Mahindra | ● Product Challenger | ● Not In | ● Not In | ● Market Challenger |
| Traction on Demand | ● Not In | ● Leader | ● Product Challenger | ● Product Challenger |
| Zensar | ● Not In | ● Product Challenger | ● Not In | ● Product Challenger |



Salesforce Ecosystem Partners Quadrants



ENTERPRISE CONTEXT

Salesforce Implementation and Integration Services

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

In this quadrant report, ISG lays out the current market positioning of Salesforce implementation and integration services providers in the U.S., and how they address the key challenges enterprises face in the region. Over the past few years, Salesforce has augmented its product strategy to extend beyond customer relationship management (CRM) applications into related applications, development, integration, and reporting. ISG observes a demand among enterprises for Salesforce implementation and integration services that facilitate the adoption and consumption of Salesforce's cloud solutions and peripheral tools. These service providers also address non-Salesforce systems and services in enterprises, which also need to be integrated into the Salesforce ecosystem.

In the U.S., which is a mature Salesforce market compared to other regions, the complexity of an enterprise's underlying application system landscape tends to increase significantly with the size of the enterprise. An additional complexity dimension appears with a global system deployment. As a result, in most cases, large enterprises prefer providers that have strong integration capabilities and are acting on a global scale by themselves. Most large enterprises have a mix of applications, including Salesforce, SAP, Oracle, Microsoft, homegrown applications and others. This mix means enterprises should not only look into a service provider's capabilities with Salesforce but also with other environments.

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them effectively implement Salesforce Marketing and Sales clouds and Heroku among others, with the necessary integrations to related systems and analysis solutions.

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

IT and technology leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively consume services from Salesforce clouds, integrations and analysis solutions. The report also shows how service provider technical capabilities compare with the rest in the market.

Security and data professionals should read this report to understand how providers comply with the U.S. security and data protection laws in their Salesforce implementation and integration practices and how they compare to one another.

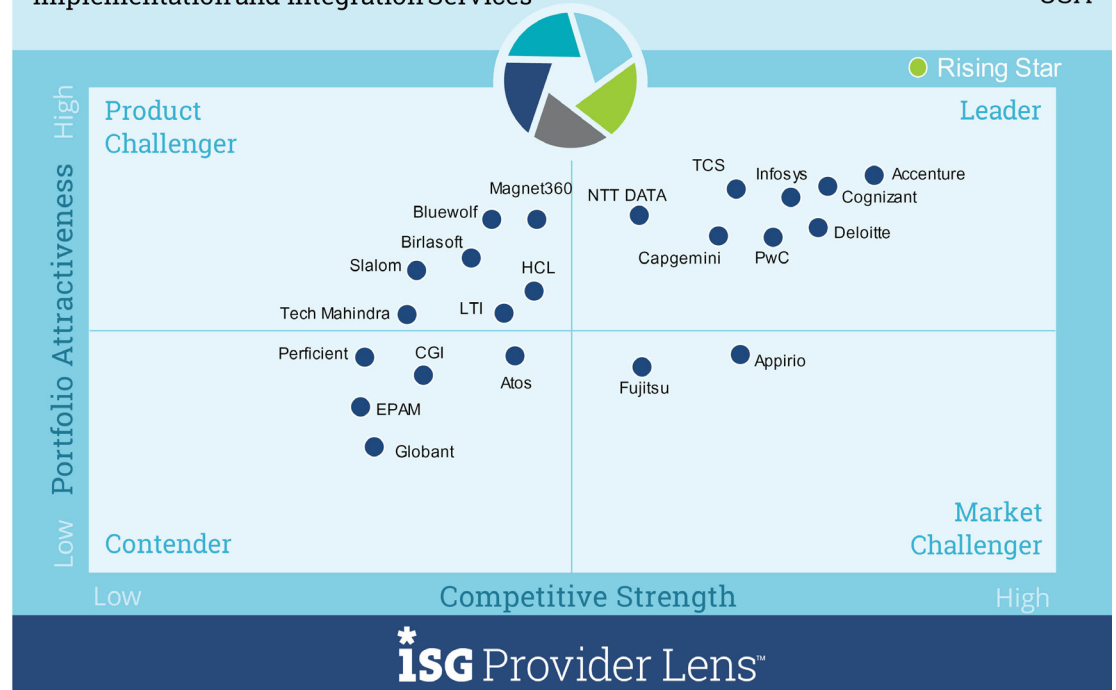
IMPLEMENTATION AND INTEGRATION SERVICES

Definition

This segment addresses the providers of implementation services for Salesforce applications as well as their integration with other major software solutions that are usually part of the sophisticated system landscapes of large and globally operating enterprise customers. These services include consulting, configuration and implementation of the respective applications for the client, integration within the client’s system landscape, data migration and go-live support.

Salesforce Ecosystem Partners 2020
Implementation and Integration Services

2020
USA



Source: ISG Research 2020

IMPLEMENTATION AND INTEGRATION SERVICES

Eligibility Criteria

The important criteria used in the evaluation are:

- Technological competency in sales cloud, service cloud, marketing cloud and Einstein Analytics
- Innovation portfolio attractiveness
- Accelerators and productivity solutions
- Capabilities for integration within sophisticated system landscapes
- Unique capabilities and differentiators
- Execution capabilities/Workforce
- Broad client base
- Partnership with Salesforce/Certifications

Observations

- In this segment, integration and consolidation are the main requirements, hence, the system integrators have a rather significant position in this market.
- A few other providers that are not typical system integrators, but have a significant size, can also play an important role in this segment due to their strong multi-cloud and consolidation capabilities. Since the U.S. is the home market of Salesforce, the number of providers that meet these characteristics is relatively high, compared with other regions, and many of these providers usually employ hundreds of Salesforce-certified consultants. Nevertheless, potential customers need to be aware that for cases where integration with other major software packages or the ability to support global rollouts on a large scale are key requirements, these providers may not be the first choice, despite their expertise in Salesforce. The customer should have an alternative for this task, either with own resources or by considering additional services from another provider.

IMPLEMENTATION AND INTEGRATION SERVICES

Observations (cont.)

- Overall, all the leading providers in this segment exhibit broad knowledge across the entire Salesforce portfolio, including the use of the Salesforce development platform and have analytics capabilities (Einstein). Most of the providers also maintain a broad network of partnerships with ISVs, with additional products from the Salesforce ecosystem, for requirements that go beyond the standard features of Salesforce.

The following providers have been identified as Leaders in this segment: Accenture, Capgemini, Cognizant, Deloitte, Infosys, NTT Data, Pricewaterhouse Coopers (PwC) and Tata Consultancy Services (TCS).

- **Accenture** has a unique position in the market, which is reflected in its large global workforce, extensive experience and its portfolio of numerous predefined solutions that cover technical and project execution aspects as well as industry specific solutions.

- **Capgemini** has a rich experience with CRM in general, and Salesforce in particular, and can cover integration with other major software packages. The functional expertise of the company is complemented by deep knowledge of industry specifics. The company offers a highly scalable and flexible delivery model that is particularly suitable for large enterprise clients.
- **Cognizant** has functional expertise and strong capabilities related to various industries, with particular focus on healthcare. The company has developed a strong partnership with Salesforce over a longer period of time. The partnership, for instance, includes provisioning support services on behalf of Salesforce as well as joint talent development.
- **Deloitte** has a large global Salesforce practice with the U.S. as its most important market. The company's portfolio includes numerous predefined solutions for specific functionalities and various industry-specific solutions.
- **Infosys** has, within its geographical scope, a specific focus on the U.S. as key market. Apart from provisioning a comprehensive development environment for Salesforce implementations, the company's portfolio includes a strong set of advanced industry-specific solutions for industries such as automotive and healthcare.

IMPLEMENTATION AND INTEGRATION SERVICES

Observations (cont.)

- **NTT Data** has a strong Salesforce-related portfolio covering productivity-oriented solutions as well as industry specific functionalities. The company provides a sophisticated delivery model with a relatively high share of nearshore resources. The U.S. is a key market for NTT Data.
- **PwC** has a strong Salesforce-related portfolio, with particular focus on combining technology with business process transformation. The company offers several industry-specific solutions, with healthcare as the primary focus.
- **TCS** has the capability to conduct Salesforce implementations for large enterprises that require integration with a complex and often hybrid system landscape. Besides the strong offshore component, the delivery model is clearly focused on strengthening onshore presence in the U.S.



ENTERPRISE CONTEXT

Salesforce Implementation Services for Core Clouds

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

In this quadrant report, ISG lays out the current market positioning of Salesforce implementation services for core clouds providers in the U.S. and how they address the key challenges faced by enterprises in the region. The report assesses providers that specialize in Salesforce Sales, Service and Commerce Cloud offerings. These providers adopt an agile approach for implementation, helping enterprises redesign processes and then enable those processes with Salesforce applications. Unlike large enterprises, small and medium-sized enterprises seek Salesforce implementation services for core clouds that help them with projects without substantial integration needs.

In the U.S., which is a mature Salesforce market compared to other regions, the increase in Salesforce implementation services for core clouds drives the growth of most service providers in this segment. ISG research shows that some of these providers have already reached a significant size in terms of staffing with several hundred Salesforce-certified consultants.

There is an ongoing consolidation of the medium-sized providers being acquired by large system integrators that use the established brands of their acquisitions to strengthen their positions in the market.

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them effectively implement Salesforce Sales and Commerce Cloud products. The report also highlights how service providers deliver industry-specific solutions.

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

IT and technology leaders should read this report to understand the relative positioning and capabilities of partners that can help them effectively consume services from Salesforce Sales, Service and Commerce Cloud products and how the providers' technical capabilities and development methodologies compare with the rest of the market.

Security and data professionals should read this report to understand how the providers meet the U.S. security and data protection requirements for their Salesforce implementation and integration practices. The report also highlights the providers' focus on data quality and how they compare to one another.

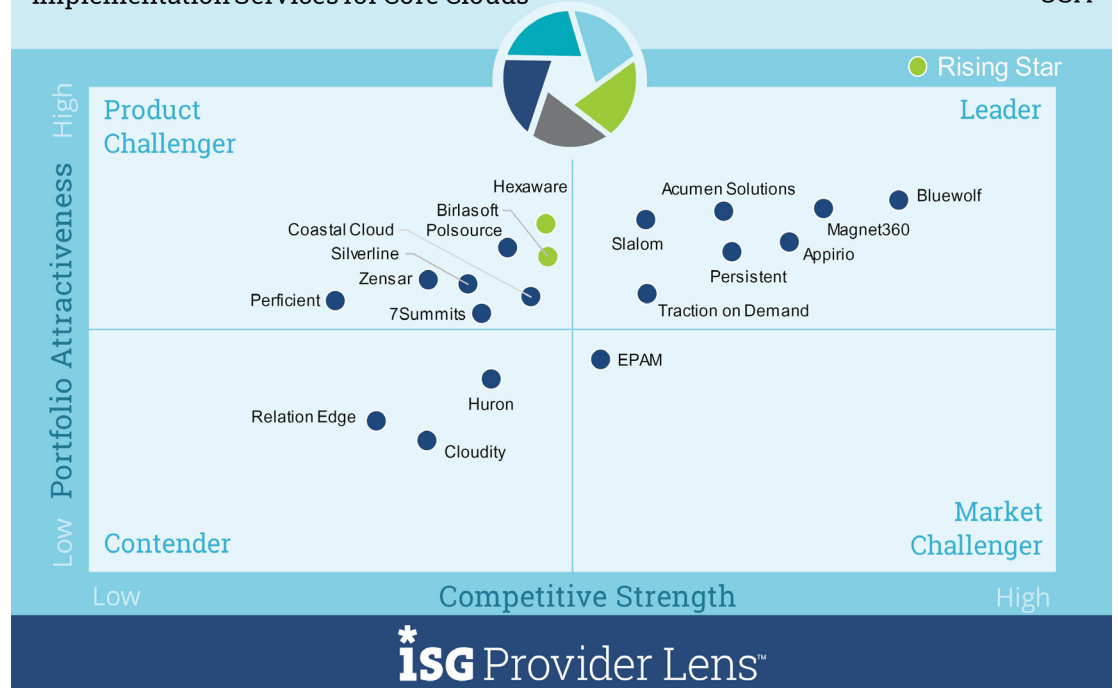
IMPLEMENTATION SERVICES FOR CORE CLOUDS

Definition

This segment addresses providers that are highly specialized in Salesforce sales, service and Commerce Cloud and are mainly focused on an agile approach for implementation. An important aspect revolves around consulting on the redesign of processes while using Salesforce applications. These providers tend to be best suited for projects without major integration needs, typically for medium and small size customers.

Salesforce Ecosystem Partners 2020
Implementation Services for Core Clouds

2020
USA



Source: ISG Research 2020

IMPLEMENTATION SERVICES FOR CORE CLOUDS

Eligibility Criteria

The most important criteria used in the evaluation are:

- Technological competency in sales cloud, service cloud, marketing cloud and commerce cloud implementations
- Accelerators and productivity solutions
- Unique capabilities and differentiators
- Execution capabilities/workforce
- Broad client base
- Partnership with Salesforce/certifications
- Country and service coverage

Observations

The primary subject of this segment is Salesforce implementations across several clouds with primary focus on agile methodology.

- In general, many providers have a slightly stronger position in Sales Cloud than in other product segments because it deals with the basics of CRM functionality such as CPQ, opportunity management and others.
- Another area where providers have broad expertise is the Service Cloud where implementations mainly cover two major areas. Firstly, there are functionalities that refer to customer service as a part of the sales process. For example, contact center functionalities and customer portals. These functionalities are usually not isolated, but used in combination with sales functionalities such as CPQ and opportunity management. Most of the Service Cloud implementations fall into this category. Secondly, there are some cases that require functionalities to support field service personnel in performing their tasks. For example, these functionalities can refer to product specifications in case of repair services or spare part supply management in case of device maintenance. Field support projects usually also have strong demand for mobile offline capabilities to ensure continuous operations irrespective of network connections.

IMPLEMENTATION SERVICES FOR CORE CLOUDS

Observations (cont.)

- The additional areas in the Salesforce product portfolio where many providers exhibit strong capabilities are development on the basis of the Salesforce platform and the use of the Einstein Analytics functionalities.
- The significant growth of this market segment is reflected in the similar growth of most providers that are atypical of this segment, and specifically in the U.S. Some of these providers have already reached a workforce size that includes hundreds of certified consultants. Another trend of this market segment is ongoing consolidation, where numerous midsize providers are being acquired by large system integrators. Several of these acquired providers continue to act as separate companies in the market, at least for a few years. It is then apparent that integration with the respective parent company is not high, and, in a few cases, it appears even not intended. Instead, the system integrators want to use these established brands to strengthen their position in the market.

The following providers have been identified as Leaders in this segment: Acumen Solutions, Appirio (a Wipro company), Bluewolf (an IBM company), Magnet360 (a Mindtree company), Persistent Systems, Slalom and Traction on Demand.

- **Acumen Solutions** offers a portfolio with a clear focus on customer interaction. The company offers numerous industry-specific solutions and, as a rare feature, solutions for integrating IoT elements into Salesforce-based applications.
- **Appirio** shows significant Salesforce competency and a strong market position in the U.S. The tools used by Appirio help to manage projects efficiently and achieve convincing results. The development of an integrated offering between Appirio and its parent company is well on track.
- **Bluewolf** has had a strong position in the U.S. with focus on rapid implementations and a broad industry expertise. Since its acquisition by IBM in 2016, the company has been significantly expanding its presence outside of the U.S., and is a strong partner for Salesforce implementations, serving clients with global operations.
- **Magnet360** is an implementation partner specializing in Salesforce implementations with a strong portfolio that includes among others, numerous powerful accelerators.

IMPLEMENTATION SERVICES FOR CORE CLOUDS

Observations (cont.)

- **Persistent Systems** has a rather unique focus, with its utilization of Salesforce as an integration platform for a data-oriented system landscape. In addition, the company offers powerful accelerators and rich industry expertise with a long-term development partnership with Salesforce.
- **Slalom** primarily offers the implementation of cloud-based solutions, particularly Salesforce, with clear focus on customer proximity in the provisioning of the services. The company has broad industry expertise and a strong methodology.

Birlasoft and Hexaware have achieved the Rising Star status in the market.

- **Birlasoft** has been focused on Salesforce for a long time. Since its merger with KPIT, it has enhanced its scope significantly and now has a strong workforce with numerous predefined solutions, which increase the likelihood of the company acquiring a leading position in this market segment in the future.
- **Hexaware** shows a strong approach toward early utilization of various industry clouds in the Salesforce portfolio. In combination with a deep knowledge in Sales and Service Cloud, this unique approach carries the potential for the company acquiring a leading position in the market segment in the near future.

PERSISTENT SYSTEMS

Overview

Persistent Systems is a U.S.-based provider offering services such as business consulting, design-led workshops, system landscape architecture, development, quality assurance and deployment with strong focus on Salesforce products. The company has its headquarters in Santa Clara, California, with offices in 26 states in the U.S. Persistent Systems is Platinum Partner of Salesforce, a member of the Cloud Alliance Partnership and employs more than 1,500 Salesforce-experienced resources, and more than 600 hold a certification by Salesforce.

Strengths

Implementation approach: Persistent Systems takes a data-oriented implementation approach using Salesforce as an enterprise platform for digital transformation. This strategy is based on a well-defined foundation layer of API and data integration layer, where it offers tools and products that are necessary for consistent data-focused implementation.

Development partnership with Salesforce: For a long time, Persistent Systems has been the product development partner of Salesforce, which enables it to develop sophisticated and customizable solutions based on the Salesforce platform.

Predefined solutions: The company's portfolio includes a rich set of solutions specifically for the healthcare industry with strong focus on service cloud. The healthcare solutions cover the entire spectrum of patient care, spanning clinic-oriented functionalities to post-treatment activities. With its Engage 360 solution, Persistent Systems provides a powerful tool for customer support and service engagements. This solution enables support and service agents and their supervisors to get a unified, pertinent access to case and customer-relevant information.

Project efficiency by accelerators: Persistent Systems offers accelerators that are usable across industries for improving service delivery and project efficiency, by supporting continuous integration and providing frameworks for deployment and post-deployment configuration.

Caution

The company's share of T&M-related work is relatively high. It should strive to increase its share in fixed price and outcome-based project to demonstrate co-responsibility in the results of respective projects.



2020 ISG Provider Lens™ Leader

The strong data-oriented approach applied by Persistent Systems is unique and makes it a leading partner in using Salesforce as an enterprise platform.

ENTERPRISE CONTEXT

Salesforce Implementation Services for Marketing Cloud

This report is relevant to small and medium-sized enterprises across all industries in the U.S. and evaluates service providers of Salesforce Implementation Services for Marketing Cloud.

In this quadrant report, ISG defines the current market positions of providers of Salesforce Implementation Services for Marketing Cloud in the U.S., and how they address key enterprise challenges in the country. These providers focus on helping enterprise clients deliver direct personalized customer engagement and on increasing revenue through one-on-one communications, at scale, and across multiple channels. Marketing Cloud is often the starting point for Salesforce, and ISG sees enterprises seeking Salesforce implementation services typically, are without sophisticated real-time integration needs.

In the U.S., the focus of Salesforce Implementation Services for Marketing Cloud is about enhancing customer experience. ISG research shows more custom solutions than the ones with reusable components. This preference means that service providers rely on development more than component libraries to help deliver Marketing Cloud implementations.

Also, since marketing functions involve many enterprise customer and prospect transactions, a provider's automation capabilities are important.

Marketing leaders should read this report to understand the relative positioning and capabilities of service partners that can help them to implement Salesforce Marketing Cloud products effectively. It also highlights the marketing expertise of various service providers, including their digital experience and accelerators.

IT and technology leaders should read this report to understand the relative positioning and capabilities of partners that can help them effectively adopt Salesforce Marketing Cloud product services. It would also enable them to compare the technical capabilities, automation depth and development methodologies of the providers.

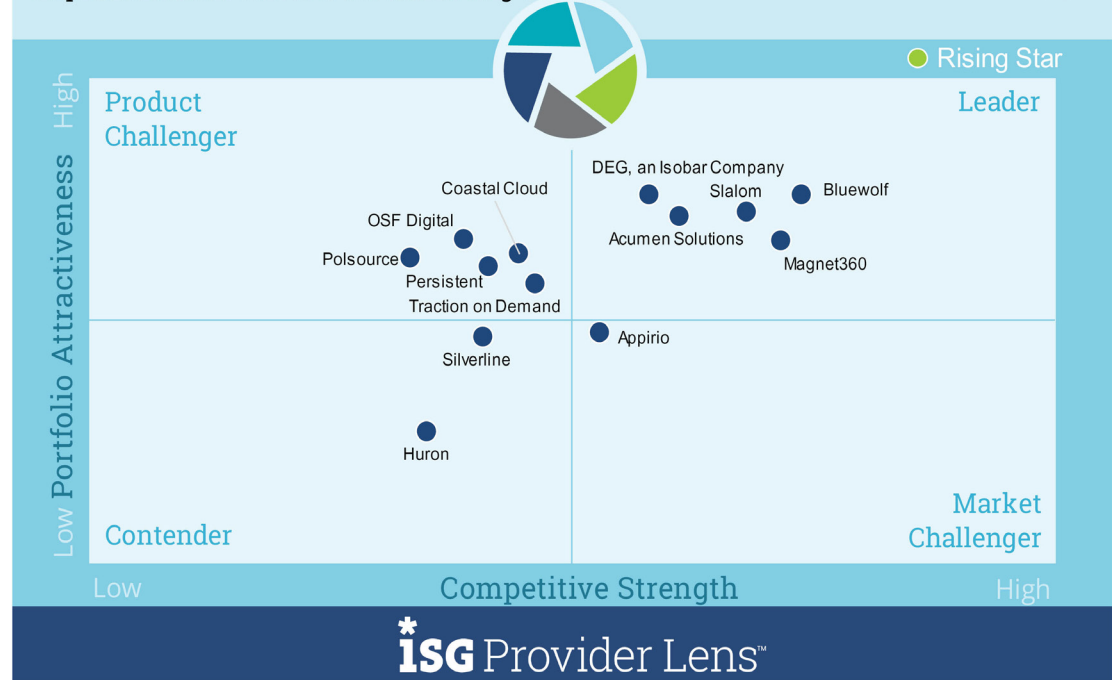
IMPLEMENTATION SERVICES FOR MARKETING CLOUD

Definition

Salesforce Marketing Cloud is a customer relationship management (CRM) platform for marketers that allows them to create and manage marketing relationships and campaigns involving customers. This section evaluates providers that show highly capability in Salesforce Marketing Cloud by delivering direct personalized customer engagement and ensure revenue through one-on-one communications, at scale, and across multiple channels with consumers, users, and subscribers. In this specific context of marketing, the need for real-time integration into a sophisticated system landscape is mostly limited. Sometimes even standalone. Marketing can be starting point for implementing Salesforce, driven by marketing departments. Frequently extension towards a multi-cloud implementation follows this first step which is covered by the segment Core Cloud (see above)

Salesforce Ecosystem Partners 2020
Implementation Services for Marketing Cloud

2020
USA



Source: ISG Research 2020

IMPLEMENTATION SERVICES FOR MARKETING CLOUD

Eligibility Criteria

- Technology competency
- Delivery capabilities
- Use cases
- Technological competency on marketing cloud and Einstein Analytics
- Innovation portfolio attractiveness
- Accelerators and productivity solutions
- Broad client base
- Country and service coverage

Observations

The implementation of Marketing Cloud defines a separate market segment within the Salesforce ecosystem.

- Within the Salesforce portfolio, Marketing Cloud addresses a rather specific audience within an organization. The departments responsible for marketing put much emphasis on customer experience and often have strong media expertise. Furthermore, the respective business processes typically do not have many integration points with the overall system landscape in a company. Therefore, custom solutions instead of reusable solutions play a more important role in this segment. Consequently, the solution libraries of the providers are often less comprehensive, and the solutions available typically need more customization and cannot be used as is.
- Another rather important characteristic of this segment is the strong need for automation solutions as the number of customer interactions or transactions tend to be very high. Therefore, most of the leading providers in this segment offer powerful automation solutions.
- Furthermore, in this segment there are several providers of Salesforce-based solutions that do not have their origin in the IT area. Instead they are primarily offering marketing services in general and the Salesforce implementation is supplementing their general portfolio.

IMPLEMENTATION SERVICES FOR MARKETING CLOUD

Observations (cont.)

The following providers have been identified as Leaders in this segment: Acumen Solutions, Bluewolf (an IBM company), DEG (an Isobar company), Magnet360 (a Mindtree company) and Slalom.

- **Acumen Solutions** has a portfolio with clear focus on customer interaction. Therefore, the company has a strong resource base on Marketing Cloud and able automation capabilities.
- **Bluewolf** has strong marketing expertise and a subsequent expertise in implementations based on Marketing Cloud. An important indication of this is the large number of related certifications among Bluewolf employees.
- **DEG** is focused on services around the marketing function of clients. The strong Salesforce-related expertise enables the company to develop client-specific solutions with broad functionalities that cover all aspects of customer interaction.
- **Magnet360** has a strong focus on Marketing Cloud, which is reflected in the powerful solutions it offers, providing a 360-degree view to customers. The company applies a powerful methodology in its projects and shows customer commitment through outcome-based solutions.
- **Slalom** has strong marketing-related expertise, which, in combination with high client proximity and rich methodology, enables the company to take a leading position in this market segment.

ENTERPRISE CONTEXT

Salesforce Managed Application Services

This report is relevant to enterprises across all industries in the U.S. and evaluates service providers of Salesforce Managed Application Services.

In this quadrant report, ISG defines the current market positions of providers of Salesforce Managed Application Services in the U.S. Traditional managed services primarily cover outsourcing activities such as onsite or remote support, or application monitoring. This study covers providers offering additional services, including administration assistance, accelerators for development and utilization, development services, proactive monitoring and advisory services.

The service providers in the U.S. support large, medium, and small enterprises that run Salesforce applications. ISG notes that proximity to enterprise workforce is an important factor determining the strong market position of providers, since several aspects of managed application services, such as user training and resolution of issues by workaround, require direct and immediate interaction with the user. Large enterprises headquartered in the U.S., that have global operations, can leverage global providers to support U.S. deployments and deployments in other parts of the world. Enterprises seeking onshore managed services can also opt for qualified mid-sized service providers. All service providers must aim for high levels of user satisfaction to sustain or encourage the use of Salesforce applications and justify the investments in Salesforce managed services.

Marketing, sales, and field services leaders should read this report to understand the relative positioning and capabilities of service partners that can help to implement Salesforce managed application services effectively. The report also highlights the advanced managed services capabilities of service providers, including administration assistance, development and use of accelerators, Salesforce Lightning services, proactive monitoring and advisory services.

IT and technology leaders should read this report to understand the relative positioning and capabilities of service providers of managed services. The report also compares the technical capabilities of these providers in areas such as remote and onsite monitoring, technology accelerators, incident response, automation and development methodologies.

Security and data professionals should read this report to understand how the providers comply with data privacy and security requirements in the U.S. in their Salesforce managed application service practices.

Procurement professionals should read this report to understand how the providers differ in their approach to Salesforce managed application services in the U.S. The report covers differences in experience in terms of Salesforce applications, nature of customer base and industry relations.

MANAGED APPLICATION SERVICES

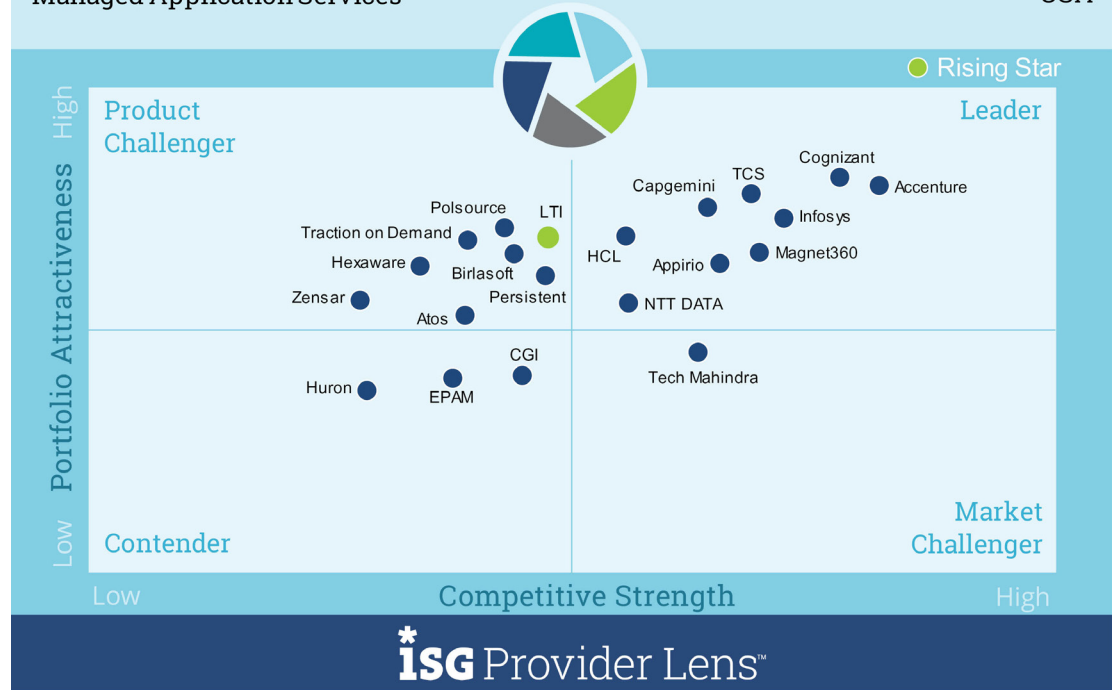
Definition

This chapter evaluates providers that specialize in Salesforce managed services. Traditional managed services include outsourcing activities like onsite or remotely support in different levels or application monitoring, but in this study ISG covers other related topics such as administration assistance, development and utilization of accelerators, lightning services, proactive monitoring and advisory services.

As for all enterprise-level applications service providers must primarily ensure stable and reliable operation of the respective solution, continuously high performance and rapid reactions and resolutions to any incidents that might occur.

Salesforce Ecosystem Partners 2020
Managed Application Services

2020
USA



Source: ISG Research 2020

MANAGED APPLICATION SERVICES

Eligibility Criteria

- Methodical and procedural concepts
- Degree of framework automation and service reliability
- Managed service portfolio attractiveness
- Maturity of delivery and contract models
- Experience with support for Salesforce-based applications
- Broad customer base
- IT outsourcing transition knowledge (compliance)
- Industry relations and partnerships
- Use cases

Observations

Managed application services have also become, in the area of cloud-based applications, an important component of provider portfolios. Companies tend to focus their resources and deep knowledge of processes primarily on projects (the change business) instead of supporting only the ongoing operations (the run business). Therefore, they often rely on service providers to manage this part..

- Operational stability and incident management, that are in the scope of managed application services, have to take not only the respective application into consideration but also connection to other systems. This usually requires additional knowledge about the connected systems, which give the large system integrators a competitive advantage in this segment over providers that focus primarily or even only on Salesforce. Another key characteristic of managed application services is the high cost consciousness among clients availing the services. The common global delivery models are another advantage for system integrators. Consequently, most leaders in this segment belong to this category, although midsize providers with basically onshore capabilities also offer qualified managed services.

MANAGED APPLICATION SERVICES

Observations (cont.)

- Proximity to the client remains an important factor determining a strong market position since several aspects of the managed application services, like user training and resolution of issues by workarounds, require interaction with the respective user. Therefore, leaders in this segment usually also have a notable onshore presence.
- Another important success factor for a cost-efficient provisioning of managed application services is the capability to automate functions such as monitoring, user support and performance optimization.

The following providers have been identified as Leaders in this segment: Accenture, Appirio (a Wipro company), Capgemini, Cognizant, HCL, Infosys, Magnet360 (a Mindtree company), NTT Data and Tata Consultancy Services (TCS).

- **Accenture** benefits, in this segment, from its extraordinarily large workforce combined with a sophisticated global delivery model. Furthermore, the broad functional and industry expertise of the company enable it to offer the capability to manage Salesforce applications in the context of the complex system landscapes of large enterprise customers.

- **Appirio** offers a variety of powerful tools supporting the management of applications. In combination with the sophisticated and rather flexible support model, Thrive, the company qualifies as a highly capable provider of managed application services.
- With **ADMNext** as its powerful application management solution, Capgemini has a compelling base for comprehensive services in this segment. This is supplemented by various business-related services that are offered as business-process-as-a-service (BPaaS).
- **Cognizant** has long-time association with Salesforce in the provisioning of application services on all levels of the user community. Furthermore, the company's portfolio includes a variety of powerful application management tools that enable it to deliver highly competitive services.
- In the area of Salesforce, **HCL** offers a comprehensive set of highly scalable and flexible services, accompanied by a scalable agile methodology. The strong focus on data quality as the reliable base for efficient system operation is also noteworthy.
- Based on a comprehensive suite of application management tools and a powerful global delivery model, **Infosys** offers a strong portfolio of managed application services for Salesforce that meets the needs of large enterprise clients.

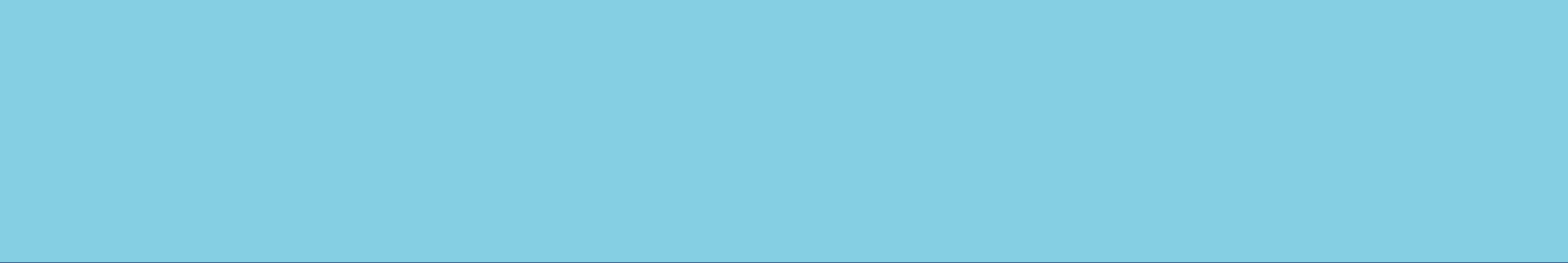
MANAGED APPLICATION SERVICES

Observations (cont.)

- **Magnet360** offers a balanced delivery model that, in combination with attention on appropriate governance structures and data quality, is the strong foundation for its the portfolio of managed application services.
- **NTT Data** has a sophisticated delivery model with a high share of nearshore resources. Strong support models and powerful tools constitute its managed service offerings.
- In addition to its strong global delivery model, **TCS** pays much attention to client proximity and is focused on continuously increasing its onshore presence. The company has a broad portfolio of application management tools and automation solutions that support cost-efficient delivery of managed services.

L&T Infotech (LTI) has achieved the Rising Star status in the market.

- **LTI** has long-time experience with addressing the needs of large enterprise clients as its focus group. Besides functional requirements, LTI shows a deep knowledge of regulatory aspects and pays high attention to data quality. Hence LTI has the potential for acquiring a leading position in this segment in the future.



Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2020 – Salesforce Ecosystem Partners” analyzes the relevant software vendors/service providers in the US market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. 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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements

Authors and Editors



Rainer Suletzki, Author

Senior IT Management Advisor, Germany

Mr. Suletzki relies on a deep understanding of core business processes and in-depth know-how of IT management. He has more than 30 years of experience as Senior IT Manager, Senior Project Manager and – at the beginning of his career – as IT consultant. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution

On behalf of ISG he conducts studies within the framework of ISG Provider Lens and takes on client projects with definition of IT strategy and the resulting sourcing decisions.

Before becoming an independent consultant, Rainer worked more than 30 years for a global German Life Science corporation.

Rainer holds graduate degrees in Economics and Computer Sciences.

Authors and Editors



Jan Erik Aase, Editor
Director

Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, services provider, ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric Archetype reports and the Quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.

ISG Provider Lens™ | Quadrant Report

April 2020

© 2020 Information Services Group, Inc. All Rights Reserved



ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of 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 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 more than 1,300 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 www.isg-one.com.