

***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:

Cognizant

About this Report

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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 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.

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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



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 de-

ployment. 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.

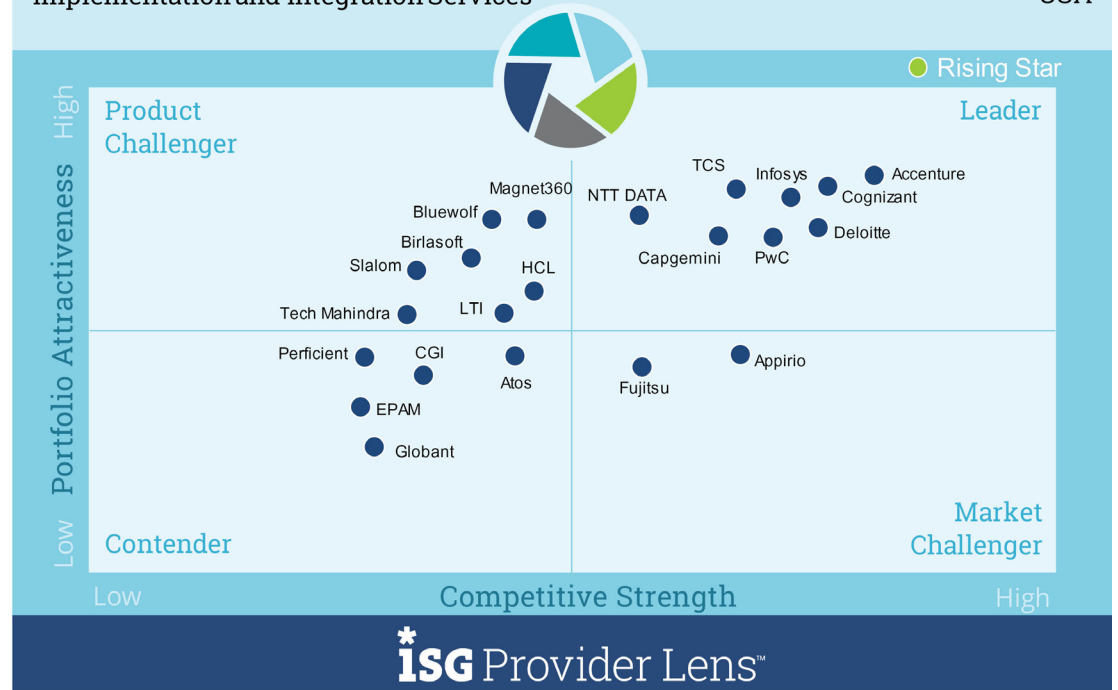
IMPLEMENTATION AND INTEGRATION SERVICES

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.



ACCENTURE

Overview

Accenture is a global management consulting and professional services provider operating in more than 120 countries and offering a broad portfolio of IT services. Its Salesforce portfolio covers consulting, implementation, migration and maintenance services, where its cloud-based solutions are focused on digital transformation. Accenture reports that it has 14,000 Salesforce dedicated resources available globally, including 5,200 who are Salesforce certified, and is a global strategic partner of Salesforce. The company is headquartered in the U.S. and has a rather strong position in the market in the country.

Strengths

Scale and delivery model: Using workforce as a metric, Accenture is one of the largest providers of Salesforce-related services on a global scale. The company operates a global delivery model that includes offshore, onshore and nearshore resources in important regions such as North America and Europe. Its expertise covers technology and business process aspects of a Salesforce solution. The company's unique position in the market is also reflected in the fact that it has Master Certifications by Salesforce in all 12 industries and all clouds currently recognized.

Powerful solutions library: Accenture's Salesforce Solutions Library offers a large number of predefined solutions, including powerful Fullforce solutions for 17 industries in what can be defined as the most comprehensive coverage of potential Salesforce customers. Furthermore, the company offers numerous productivity solutions that can be used across industries.

Focus on large enterprise customers: Due to its strong workforce, global reach and the broad availability of Fullforce solutions, Accenture is an ideal partner for large enterprises that usually have complex requirements for comprehensive Salesforce implementation and require several Salesforce products.

Partner network: Accenture has a strong network of ISV partners in the Salesforce ecosystem that offer enhanced capabilities specifically for the sales function in specific industries.

Caution

While Accenture's diverse portfolio is ideal for large enterprise requirements, its suitability needs to be clarified for specific projects of companies with less complex needs. For this type of customer, a set of basic solutions, that can easily be implemented, is recommended.



2020 ISG Provider Lens™ Leader

Accenture is a leading partner for Salesforce-based solutions and is best suited for large enterprises with complex requirements.

CAPGEMINI

Overview

Capgemini is a provider of consulting, technology and outsourcing services and has a presence in 40 countries. The company's portfolio comprises services covering the entire application lifecycle and the integration of Salesforce into a client's system landscape. Based in France, the company has held a strong position in the U.S. Salesforce market since 2012. Capgemini employs more than 1,700 Salesforce-certified resources and is a global strategic partner of Salesforce.

Strengths

Broad CRM understanding: Capgemini has significant experience in implementing CRM applications that are continuously being leveraged for the growing Salesforce business. The company offers CRM Modernization Services, a highly standardized solution, for rapidly migrating CRM applications to the cloud, particularly to Salesforce. In addition, the company's portfolio includes powerful productivity tools such as the Salesforce Healthcheck that performs both technical as well as functional checks on a running application.

Verticals expertise: Capgemini's powerful all channel experience (ACE) accelerators for banking and for insurance draws its strength from the company's strong position in supporting financial services clients that use Salesforce. Another targeted solution is the comprehensive Automobile Connected Service offering.

Strong expertise in field service operations: In the functional area of field service operations, Capgemini is a co-development partner of Salesforce. With its Field Service Lightning Accelerator, Capgemini offers a powerful and mobile-enabled solution that extends the existing Salesforce Service Cloud and Salesforce Field Service Lightning with native and comprehensive end-to-end field service operations capabilities.

Integration competency with leading software: As the company covers multiple, broadly used standard application packages like SAP, it is competent for implementations within complex system landscapes that are common in large enterprises.

Caution

While Capgemini shows broad competency in relevant technologies, its focus on business processes and related transformation needs to be strengthened for it to be considered as a partner for transformation of core business processes.

The workforce, especially in the U.S., was partially built up through multiple acquisitions, which may become a challenge for Capgemini to offer a unified solution portfolio.



2020 ISG Provider Lens™ Leader

Capgemini is a leading partner for Salesforce implementations, where it combines strong industry expertise with powerful functional solutions.

COGNIZANT

Overview

Cognizant is a global professional services provider with headquarters in the U.S. It has a strong position in traditional IT services and, in the recent years, has been focusing on the digital transformation of the core business processes of its clients. The company's Salesforce practice was established more than 10 years ago and encompasses services across the entire value chain, including strategy and platform advisory. Cognizant is a global strategic partner of Salesforce and employs more than 7,000 Salesforce consultants, of which 4,500 are certified.

Strengths

Salesforce-specific implementation methodology: Cognizant's Salesforce-specific implementation methodology, PureForce, is a hybrid agile approach that combines agile elements with phase-oriented elements (where required) to meet the integration needs of large clients with sophisticated architectures. An important characteristic of this methodology is the definition of substantial integration points in the initial phase of the respective project and the subsequent implementation of stable interfaces using an appropriate application programming interface (API) platform, which, in most cases, is the Mulesoft platform. This strategy is used for integration with on-premise applications as well as for cloud-to-cloud integration (for example: Workday).

Powerful predefined solutions: Cognizant offers a rich portfolio of functional accelerators to support various projects and industry-specific solutions. For example, it offers a powerful solution for complaint and request management (MedVantage) that is specifically designed for medical device companies and Fullforce solutions for banking and insurance, retail and consumer goods industries.

Strong global delivery: Cognizant has delivery presence in more than 35 countries, including four delivery centers and one digital collaboratory center in the U.S. that enable the company to serve enterprise customers globally.

Investment in client success: Cognizant is primarily engaged in outcome-based projects and is working to further reduce its already low share in T&M-based engagements.

Caution

The company needs to enhance its portfolio of predefined solutions for some important verticals such as discrete manufacturing and automotive.

By defining basic starter packages, the company should address the needs of midsize customers.



2020 ISG Provider Lens™ Leader

Cognizant is a highly competitive provider of Salesforce-related services, specifically for large enterprise customers.

DELOITTE DIGITAL

 Overview

Deloitte is one of the largest global management consulting providers and its digital practice includes a range of services including strategy, implementation and custom development. Deloitte Digital is headquartered in the U.S. and operates Salesforce practices in more than 30 countries. The company is a global strategic partner of Salesforce and has more than 6,500 Salesforce resources, of which 3,300 are certified. Beyond general consulting, Deloitte Digital has the expertise in providing sophisticated industry solutions.

 Strengths

Portfolio, approach and resources: Deloitte focuses its Salesforce portfolio on integrating and aligning business processes with technology. This approach is suitable for situations where digital transformation is a key requirement and where the requirement is for more than a technical implementation.

ERP expertise: The integration needs of large enterprise customers are well covered, particularly for complex enterprise resource planning (ERP) integrations. Deloitte's IT-related expertise, together with its financial advisory, audit and risk management competency, can be beneficial for clients.

Strong portfolio of predefined solutions: The Salesforce portfolio of Deloitte Digital comprises several powerful Fullforce solutions that are mainly targeted at the financial, manufacturing and life sciences industries. Recently, with the Assets & Solutions Group (ASG), Deloitte established an organizational framework for its member firms to offer, to its clients, assets and app-enabled services, thereby extending the Salesforce platform across multiple industries and functional areas.

 Caution

The company's portfolio is highly suitable for large enterprises with complex requirements, but the company is yet to prove if midsize companies, with their particular project situations, would sufficiently benefit from its offerings.



2020 ISG Provider Lens™ Leader

Deloitte is one of the leading providers of Salesforce-related services that focuses on combining strategy and technology.

INFOSYS

Overview

Infosys provides consulting and technology services globally. The company's services include architecture definition, agile implementations, global rollout execution, ecosystem integration, platform-based application modernization and support services. It was founded in 1981 and is headquartered in Bengaluru, India. Infosys has Salesforce deployment experience across industry verticals and has additional expertise with numerous ISV solution offerings based on the Salesforce platform. The company is the Platinum Partner of Salesforce and has more than 3,900 Salesforce-dedicated resources, of which more than 1,880 are certified.

Strengths

Delivery model formula: Infosys operates as a global delivery organization with several delivery centers in the U.S. that offer a mix of onshore and offshore resources contributing to cost-efficient project execution. In the recent years, Infosys has achieved strong growth in Salesforce-related market segments.

Migration expertise: Infosys focuses on legacy to Salesforce migration to help clients achieve application rationalization alongside modernization of various platforms to integrate with the Salesforce platform. Another powerful tool in this context is the Sandbox Manager, which supports the parallel management of several Salesforce instances.

Industry-specific offerings: Infosys has several industry-specific solutions encompassing industries such as automotive and healthcare. For example, the Smart Field Service Manager is specifically designed for the needs of the high tech industry.

Strong functional accelerators/solutions: With standardized solution packages, the company covers the integration of Salesforce-based solutions with complex IT environments. Particularly for sales cloud, the company's portfolio includes a comprehensive pre-configured template for cross-industry use. In the context of service cloud, Infosys offers several solutions, including a field service platform (connected devices, mobile experience, field service automation) and HR case management.

Caution

The company's global delivery model is ideal for large companies, while a higher onshore presence may be required for medium-size companies, however the company is trying to bridge this gap with acquisitions (SIMPLUS and FLUIDO).

Infosys has strong focus on technology and tools, while its business process transformation capability needs to be strengthened.



2020 ISG Provider Lens™ Leader

Infosys is a capable provider of Salesforce-related services with powerful industry solutions and productivity tools supported by a global delivery model.

NTT DATA

Overview

NTT DATA is the IT services corporation within the NTT Group, a technology provider that operates worldwide. NTT DATA's Salesforce services provide enterprise-grade digital business transformation and business consulting. The services cover a broad range of client requirements — from advisory services and implementation services to management and support. The company is a Platinum Partner of Salesforce and has more than 650 Salesforce-certified resources. NTT DATA has its headquarters in Plano, Texas, while the parent company has its headquarters in Tokyo, Japan.

Strengths

Onshore resources and nearshore and offshore support: NTT DATA's Salesforce-related workforce comprises more than 700 certified consultants, placed in a way to cover local markets and with working proximity to actual client locations by onshore consultants. NTT DATA also uses several nearshore and offshore locations in various countries. For instance, Latin America is used to serve clients in the U.S. NTT DATA operates an Innovation Center in the U.S. with significant focus on Salesforce.

Methodology and governance approach: The company's project methodology relies upon agile methods but takes customer readiness into account. Phase-oriented elements are included where required. NTT DATA places much emphasis on a comprehensive governance model in its implementation projects.

Predefined solutions: NTT DATA offers several accelerators that are suitable for cross-industry use, for example, manufacturing in a BOX. For industry-specific use other accelerators are available such as the Insurance Digital Platform and the Digital Transformation Lab for the telco industry. The use of Field Service Lightning is well developed in various solutions provided by NTT DATA, which is a clear indication of the company's enhanced capabilities focused on customer-service-related functionalities.

Integration capabilities: NTT DATA offers a predefined and comprehensive SAP integration package as a proprietary product.

Caution

NTT DATA has needs to further reduce the share of its T&M-related engagements in the U.S. in order to take over co-responsibility for the outcome of the projects.

The strong focus on large enterprises and the rich methodology are not always appropriate for midsize companies.



2020 ISG Provider Lens™ Leader

NTT DATA's Salesforce services portfolio combines powerful industry and productivity solutions with a highly sophisticated delivery model.

PWC

 Overview

PWC is one of the largest management consulting providers globally, and its digital practice lies at the intersection of business and innovation. The company has its headquarters in New York, and its services combine industry and strategy knowledge with technology expertise. For Salesforce, the company's portfolio covers advisory, business transformation and implementation. In the recent years, the company has developed its capabilities in IT and digital transformation. PWC is a Global Strategic Partner of Salesforce and has around 1,200 Salesforce-certified consultants.

 Strengths

Strong expertise for digital transformation: The company's strength lies in strategy and solution design phases, in understanding the architecture of the entire system landscape and in undertaking the necessary change management activities in major transformation processes.

Powerful predefined industry specific solutions: PWC's Total Retail Clienteling solution provides an integrated and personalized customer experience across store, social and mobile channels and is a good example of the innovative use of sales cloud. With its Patient Digital Care and Smart Agent for healthcare, PWC accelerators cover two of the most important customer service relationships within healthcare, namely, the relationship between healthcare providers and patients and the relationship between health plan providers and members. Both are examples of the innovative use of Salesforce service cloud functionalities.

Employee-centric solutions: A unique offering in PWC's portfolio is a solution combining numerous functionalities for employee-related services such as recruiting, onboarding and employee self-service.

 Caution

While PWC has a strong onshore workforce the options for utilizing nearshore and offshore resources appear to have limitations.

With the design and implementation of specific solutions, more consideration should be given to standardization of cloud-based implementations.



2020 ISG Provider Lens™ Leader

PWC offers a compelling combination of strategic consulting with strong implementation capabilities for Salesforce products.

TCS

 Overview

Tata Consultancy Services (TCS) provides IT and IT enabled services worldwide. The company has its headquarters in Mumbai, India, and serves numerous industries. Its portfolio covers the entire diaspora of digital transformation, from strategy and design over implementation to managed application services. TCS is a Platinum Partner of Salesforce and its Salesforce practice includes more than 3,500 Salesforce-related resources, of which about 1,750 are certified.

 Strengths

Focus on large enterprise customers: Owing to its broad portfolio covering most leading-edge IT technologies, TCS is capable to conduct Salesforce implementations for large enterprises that require integration into a complex and often hybrid system landscape. For example, TCS offers predefined integration solutions for major ERP platforms such as SAP and Oracle. The company focuses on large enterprises, as customers, and their requirements for global multi-cloud rollouts.

Delivery strategy: TCS has a strong global delivery concept with a dedicated onshore presence in many countries such as the U.S. and Europe, and large offshore capabilities in India. Nearshore capabilities have also become also an important pillar in the company's delivery system.

Strong project methodology: During the conceptual phases of projects, TCS offers a Strategy and Blueprint Process that includes, for example, the definition of a roadmap for the deployment of the Salesforce platform or the definition of target capabilities and key performance indicators (KPIs). With Salesforce Jump-Start, the portfolio comprises pre-configured environments for multiple Salesforce clouds that can be used as a foundation for blueprint, defining requirements, and other definition phases of projects. Furthermore, they can serve as the starting point for project implementations.

 Caution

The share of T&M services delivered onshore appears to be relatively high and TCS should strengthen its fixed price/outcome-based projects for this delivery category.



2020 ISG Provider Lens™ Leader

In the recent years, TCS has become a leading provider of Salesforce-related services and exhibits a very strong implementation portfolio mainly for large enterprise customers.

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.

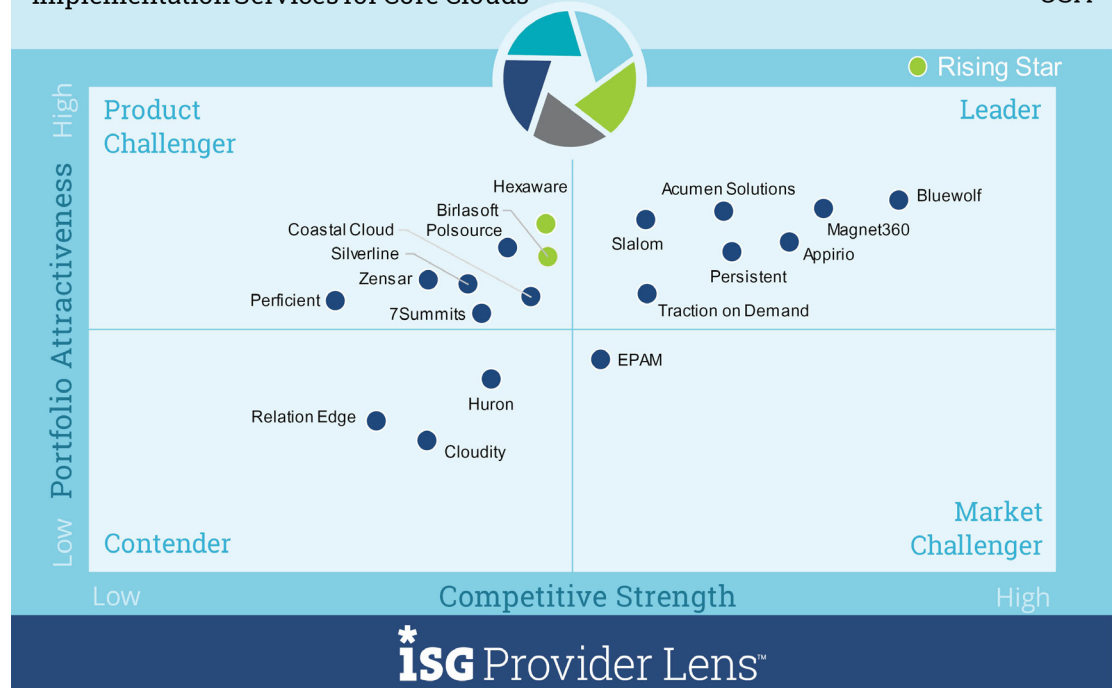
IMPLEMENTATION SERVICES FOR CORE CLOUDS

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.

ACUMEN SOLUTIONS

Overview

Acumen Solutions is an IT consultancy firm that focuses on customer relationship management solutions, especially Salesforce. The company was founded in 1999 and has its headquarters in Washington, D.C. Its portfolio covers services as enterprise architecture and design, enterprise transformation, program management and application development. Acumen Solutions operates mainly in the Americas and the Europe, Middle East and Africa region. The company is a Global Strategic Partner of Salesforce and has more than 615 Salesforce-certified resources.

Strengths

Focus on customer interaction: Acumen Solution's portfolio focuses on functionalities related to any type of customer interaction. The company offers its services to the following industries: retail/consumer packaged goods, manufacturing, public sector, health and life sciences, financial services, education, hospitality, professional services and nonprofit.

Strong automation capabilities: The portfolio includes solutions for the automation of the Lead to Cash process by integrating CRM, pricing, configure, price quote (CPQ) and contract lifecycle management (CLM). Furthermore, advanced analytics are utilized for data-driven decision making in the areas of sales cloud and service cloud.

Integration of IoT: A key technology area in the company's portfolio is the secure integration of IoT for connected product functionalities. Acumen Solutions helps its customers use industry leading IoT technologies to capture, filter and protect large volumes of data from respective connected products of clients.

Industry solutions: For the manufacturing industry, in particular, Acumen Solutions provides a set of innovative solutions that make use of enhanced digital capabilities like IoT and analytics. For example, its remote service management solution for connected products allows manufacturers to change service model from customer-initiated service to predictive service. The solution is also applicable in the healthcare industry.

Caution

Acumen Solutions should give more consideration to utilization of offshore resources in order to improve cost efficiency.



2020 ISG Provider Lens™ Leader

Acumen Solutions is a highly capable provider of Salesforce-related services and has considerable experience in this business.

APPIRIO (WIPRO)

Overview

Appirio is a global cloud services company that focuses on Salesforce-based solutions. The company's services include strategy consulting, application design and development, implementation, system integration and managed services. Appirio was founded in 2006 and is headquartered in Indianapolis, Indiana. The company is a Global Strategic Partner of Salesforce and has about 1,250 Salesforce-certified resources worldwide. Appirio was acquired by Wipro in late 2016.

Strengths

Strong focus on Cloud solutions: Appirio relies on strong technology implementation skills for major cloud platforms on the Salesforce platform. The solutions being offered by the company cover functionalities that focus on worker and customer experience while making use of various Salesforce products. In its strategic approach, Appirio focuses on achieving business outcomes that make the success of an IT solution tangible.

Standard solution packages: From a functionality perspective, Appirio offers Quote-to-Cash, Warranty Management and Lightning Bolt based order management solutions specifically for the medical devices business. Another example is the process-driven Lightning Flow based offering, specifically for financial institutions that includes a step-by-step onboarding guidance solution for new and existing customers.

Strong Industry expertise: The solutions are oriented to verticals such as manufacturing, healthcare, financial services, media and communications and retail and consumer goods. Nonprofits and higher education are also covered.

Assets library: Appirio maintains a comprehensive library of predefined solutions, accelerators and other assets that can be used in customer projects. For example, Lightning Bolt solutions and Heroku and Platform accelerators for mobile sales engagement.

Caution

The enhancement of capabilities by combining services with its parent company, Wipro, should be given more consideration in the portfolio. For example, it should focus on integration of Salesforce in complex landscapes.



2020 ISG Provider Lens™ Leader

Appirio's strong Salesforce expertise in combination with the capabilities of the parent company, Wipro, qualifies it as a leading Salesforce solution provider.

BLUEWOLF (IBM)

Overview

Bluewolf is a global consulting company founded in 2000 and has its headquarters in New York City. Bluewolf is focused only on Salesforce and provides implementation and migration services for all products in the Salesforce solution portfolio. In 2016, the company was acquired by IBM. Since then, it has been operating as IBM's Salesforce practice. Bluewolf is a Global Strategic Partner of Salesforce and has about 1,850 Salesforce-certified resources.

Strengths

Focus and solution scope: Bluewolf has a clear focus on Salesforce with a long-term experience in implementing Salesforce solutions by utilizing various Salesforce products. The company's portfolio includes a comprehensive library of industry-specific assets, accelerators and expertise in the following industries: financial services, healthcare, manufacturing, higher education, public sector and new media.

Packaged services: For rapid implementation, Bluewolf offers fixed price packages for highly standardized sales cloud and service cloud implementation (Bluewolf Go). The company primarily focuses mainly on agile methods to generate fast implementation results.

Targeted industry depth: By connecting Salesforce's customer-first cloud and products with IBM's industry-first solutions and capabilities, Bluewolf is capable of designing and implementing end-to-end solutions for businesses across industries. The company's portfolio includes several Lightning Bolt solutions for various industries. For example, the company offers a solution for clinical trials and patient management for the healthcare industry. Another unique solution is the interconnection with IBM Watson for approaches relying on AI.

Caution

The company provides limited information about specific functional solutions such as accelerators and productivity tools.

In the methodology, the readiness of clients for agile methods should be given more consideration.



2020 ISG Provider Lens™ Leader

Bluewolf's strong Salesforce portfolio, in combination with IBM's technological competency (including Watson), is an attractive offering for clients seeking leading-edge CRM solutions.

MAGNET360 (MINDTREE)

Overview

Magnet360, Mindtree's Salesforce practice, brings 14 years of Salesforce expertise into the Mindtree portfolio. Magnet360 focuses only on Salesforce and exhibits its expertise in the use of all Salesforce products across industries. The company has its headquarters in Minneapolis with a presence in several other locations in the U.S. such as New York, Chicago and Los Angeles. Magnet360 is the Platinum Partner of Salesforce and employs more than 350 Salesforce-certified consultants.

Strengths

Industry solutions and accelerators: Magnet360 offers several industry-specific solutions, including solutions for consumer packaged goods and retail, manufacturing (including IoT aspects), financial services (where it has a focus on insurance and partners with Duck Creek) and healthcare (patient engage solutions). Connected Manufacturing, from Magnet360, is an innovative solution for service cloud that extensively uses IoT elements. In the context of IoT, Magnet360 also offers a Salesforce starter package.

Strong Methodology: The methodology that Magnet360 brings to project engagements is well developed and includes a variety of accelerators such as Code Analyzer, Org Optimizer, Risk Base Testing that support specific project activities. For projects in the initial phases, Magnet360's fast forward methodology is applicable for strategy development and roadmap planning. Stakeholder participation and governance structures are also considered.

Attention to data quality: Data management is given significant attention in Magnet360's project methodology that measures data quality as a part of business performance assessment. This approach assures quality in the final results of an implemented project.

Caution

Magnet360 is focused on agile methods, specifically in the development and implementation phases. For customer that are not ready for agile methods the company should offer a more hybrid approach with some phase-oriented elements.



2020 ISG Provider Lens™ Leader

Magnet360 has a strong Salesforce-related portfolio with numerous productivity tools and comprehensive industry solutions.

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.

SLALOM

Overview

Slalom is a business and technology consulting firm focused on strategy and business transformation using cloud-based platforms. The company is present in 28 cities across the U.S., U.K., and Canada, with its headquarters in Seattle, Washington. Slalom was founded in 2001, employs more than 500 Salesforce-certified consultants and is the Platinum Partner of Salesforce.

Strengths

Focus on cloud: Slalom has a strong focus on digital transformation using cloud-based platforms and applications. The company takes a holistic approach to various project situations, where it considers aspects such as company culture and individual customer experience related to the respective application.

Customer proximity: Slalom's methodology is based on inputs from a team of local consultants working with subject matter experts in a global network of expertise. In combination with a user-centric approach and agile development and implementation, this model allows high customer proximity during the project work while providing broad functional and industry expertise across different projects.

Industry expertise: Slalom uses its broad industry expertise to offer numerous sophisticated industry-specific solutions encompassing industries such as financial services (insurance) and retail. Furthermore, the company's portfolio also includes several predefined function-specific solutions such as a solution for cross-channel customer service.

Strong development methodology: Slalom has the expertise in achieving continuous integration and maintenance of Salesforce applications by the use of sophisticated DevOps best practices. This includes specific tools for maintaining code as well as approaches to automate code deployments.

Caution

The portfolio of predefined functional solutions should be extended to improve project efficiency.



2020 ISG Provider Lens™ Leader

Slalom is a strong provider of strategy and implementation services for cloud-based applications, especially Salesforce, with a clear and innovative methodology.

TRACTION ON DEMAND

Overview

Traction on Demand is a North America-based Salesforce consulting and application development company that was founded in 2007. With its headquarters in Burnaby, British Columbia, Canada, the company has offices in Toronto, Montreal and Houston. It is the Platinum Partner of Salesforce with more than 240 Salesforce-certified experts. The company operates dedicated practices for each cloud on the Salesforce platform, including sales, service, marketing, communities, commerce, analytics and custom development.

Strengths

Portfolio strength: Traction on Demand offers a broad service portfolio around most Salesforce products that includes a variety of sophisticated solutions. Some of these are also offered as standalone applications on the Salesforce AppExchange store. The company focuses on small and medium-sized companies and, as a specific market segment, non-profit organizations, where they have a large number of clients.

Enabling the customers: In its project methodology, Traction on Demand places much emphasis on the resultant client enablement. Starting with a platform roadmap in consulting over a collaborative development process, to an enablement-oriented user adoption training and post project support, the methodology is designed to enhance a client's capabilities to ensure that the dependency on outside consultants can be reduced in the long term.

Rich set of predefined solutions: The portfolio includes several powerful accelerators such as Traction Complete for comprehensive lead management and Traction Forge that supports manufacturing companies in building customer-centric organizations.

Strong orientation toward data quality: Ensuring best possible data quality is an essential part of the implementation approach taken by the company, where it is supported by a process of standardization, cleansing, de-duplication, and enrichment of the relevant data.

Caution

The onshore only approach may limit the chances of achieving cost efficiency. Utilizing offshore resources by partnering with an offshore provider is recommended.



2020 ISG Provider Lens™ Leader

Traction on Demand is a highly capable Salesforce service provider with a strong focus on enabling a client's own capabilities during project execution.

RISING STAR: BIRLASOFT

Overview

Birlasoft is a U.S.-based IT solutions provider headquartered in Edison, New Jersey, that offers Salesforce related services for numerous verticals like automotive, industrial manufacturing, healthcare, insurance and aerospace and defense. The former Birlasoft company, founded in 1995, was recently acquired by KPIT and subsequently all the group's IT application related services were merged into a newly formed company, also carrying the name Birlasoft. The company's Salesforce services cover customization, implementation, optimization and the migration from other platforms. The company is the Gold Partner of Salesforce and has more than 110 Salesforce-certified consultants.

Strengths

Comprehensive methodology: Birlasoft's methodology for Salesforce implementations covers the entire preparation and decision process. It includes predefined packages for all relevant phases and a sophisticated governance model that supports effective project execution. In most cases, hybrid agile models comprising both agile and phase-oriented elements are applied. The company's sophisticated Governance model supports effective project execution and adequately covers business requirements.

Salesforce tooling: The Fullforce solution portfolio includes TrueLens, a comprehensive health and audit tool, for examining Salesforce implementation status and integrity with regard to customization, data volume, data growth, utilization and more. A cross-industry solution for enhanced contract management (TruView) is also available.

Strong service cloud capabilities: In comparison with numerous competitors, the capabilities, predefined solutions, and other features of the service cloud are significant. The service cloud capabilities comprise, among other functionalities, global call center support and rollout, configuration of omnichannel functionalities and design and development of lightning service consoles for service agents. Specifically for field service automation, the company's portfolio includes a Fullforce solution (TruServ).

Caution

While Birlasoft has deep knowledge about several industries, some others, such as Automotive or Telecom, should be given more consideration in the company's portfolio.



2020 ISG Provider Lens™ Rising Star

Birlasoft's strong portfolio and its enhanced capabilities, following the merger with KPIT, carries the potential for the company to take a leading position as a Salesforce solution provider.

RISING STAR: HEXAWARE

Overview

Hexaware is a global IT consulting provider with strong focus on cloud-based solutions. The company has its headquarters in Mumbai, India. Its Salesforce practice was founded in 2010 and has shown a significant growth over the recent years. Hexaware is the Gold Partner of Salesforce and has more than 50 Salesforce-certified resources.

Strengths

Focus on industry specific clouds: Hexaware focuses on the early adoption of industry-specific cloud products within the Salesforce Portfolio. Based on a deep knowledge of basic Sales Clouds and Service Clouds, the company provides and co-develops sophisticated solutions for various industries such as healthcare and financial services.

Strong development capabilities: Hexaware exhibits strong development capabilities and has deep knowledge of the development and integration platform, Mulesoft, for which it holds numerous certifications.

Well-defined methodology: The methodology applied by Hexaware relies, to a large degree, on agile elements that are combined with phase-oriented elements where appropriate or where customer organization do not show sufficient readiness for agile methods (hybrid agile).

Co-responsibility for results: The share of fixed price/outcome-based projects is relatively high, where Hexaware shows co-responsibility for the results of the respective projects.

Caution

Hexaware needs to increase the number of resources with Salesforce certifications in order to meet the high demand by clients.

The predefined solutions need to be clearly described and presented in a customer-oriented catalog.



2020 ISG Provider Lens™ Rising Star

Hexaware has developed a variety of solutions for the industry clouds of Salesforce and has the potential for acquiring a leading position in this segment.

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.

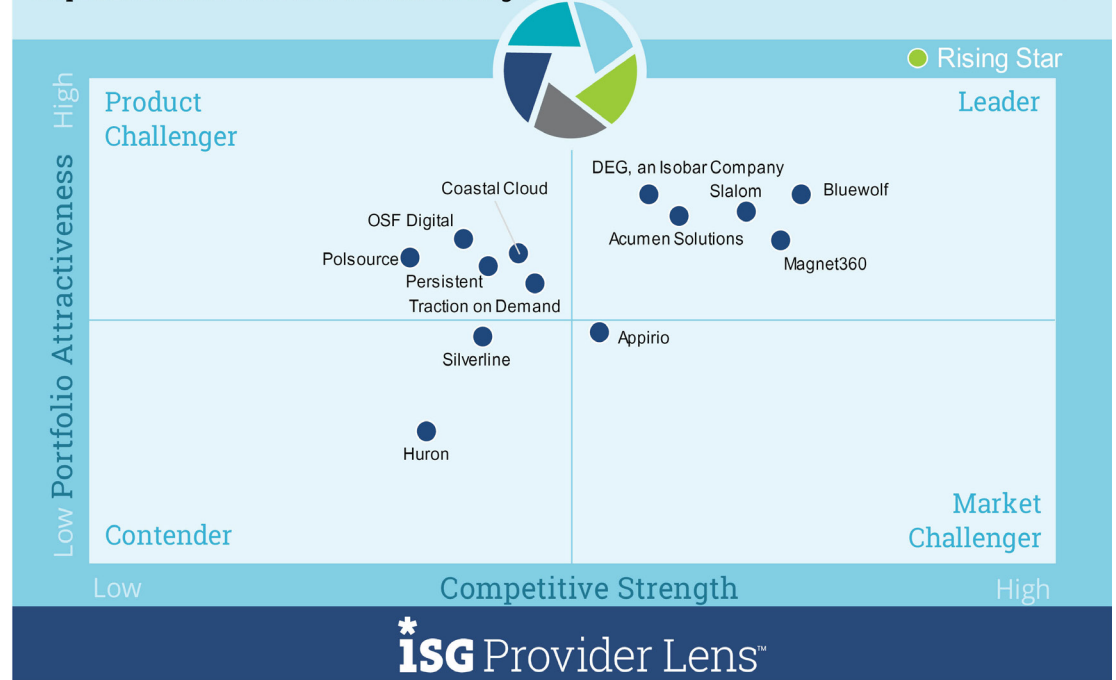
IMPLEMENTATION SERVICES FOR MARKETING CLOUD

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.

ACUMEN SOLUTIONS

Overview

Acumen Solutions is an IT consultancy firm that focuses on customer relationship management solutions, especially Salesforce. The company was founded in 1999 and has its headquarters in Washington, D.C. Its portfolio covers services such as enterprise architecture and design, enterprise transformation, program management and application development. Acumen Solutions operates mainly in the Americas and Europe, the Middle East and Africa. The company is a Global Strategic Partner of Salesforce, with more than 615 Salesforce-certified resources.

Strengths

Focus on customer interaction: Acumen Solution's portfolio focuses on functionalities related to any type of customer interaction. The company has the following industries in its ambit: retail/consumer packaged goods, manufacturing, public sector, health and life sciences, financial services, education, hospitality, professional services and nonprofit.

Solutions for customer experience: With its Engagement Marketing offering, Acumen Solutions enables clients to get a 360-degree view of customer preferences and behaviors. This allows clients to design actionable campaigns and promotions and drive strong customer loyalty. Powerful solutions for cloud and mobile technologies, to enable interactions with customer and collect feedback, are also a part of the portfolio.

Strong automation capabilities: The functionalities can be enriched by powerful automation mechanisms to achieve scalability for a large number of customer interactions such as capturing customer preference information, mapping out customer journeys, and creating personalized campaigns and promotions.

Strong resource base for marketing cloud: The number of Acumen Solutions consultants with Salesforce certification in marketing cloud is high compared with that of many competitors.

Caution

Acumen should give more consideration to utilization of offshore resources in order to ensure cost efficiency.



2020 ISG Provider Lens™ Leader

Acumen Solutions is a highly capable provider of Salesforce-related services with a specific focus on marketing cloud.

BLUEWOLF (IBM)

Overview

Bluewolf is a global consulting agency that was founded in 2000 with its headquarters in New York City. Bluewolf is solely focused on Salesforce and provides implementation and migration services for all products in the Salesforce solution portfolio. In 2016, the company was acquired by IBM and since then has been operating as IBM's Salesforce practice. Bluewolf is a Global Strategic Partner of Salesforce and has about 1,850 Salesforce-certified resources.

Strengths

Focus and solution scope: Bluewolf is focused on Salesforce with long-standing experience in implementing Salesforce solutions. The company's portfolio includes a comprehensive library of industry-specific assets, accelerators and expertise for the following industries: financial services, healthcare, manufacturing, higher education, public sector and new media.

Strong position on marketing cloud: Compared with various Salesforce-focused providers of similar size, Bluewolf has a large footprint in marketing cloud. This is illustrated by the large number of certifications among Bluewolf employees. The respective solutions enable clients to deliver consistent, personalized service and experiences to their customers and also adopt comprehensive omnichannel strategies such as providing customer self-service or collecting ratings on customer care services.

Marketing-specific requirements: Bluewolf is capable of building powerful multi-cloud solutions, including Marketing Cloud, that provide a complete 360-degree view on customers. This helps to meet the specific requirements of marketing departments.

Caution

The company provides only limited information about specific available functional solutions such as accelerators and productivity tools.



2020 ISG Provider Lens™ Leader

Bluewolf offers an impressive portfolio of Salesforce-related services to specifically address the needs of marketing departments.

DEG (AN ISOBAR COMPANY)

Overview

DEG, an Isobar Company, is a U.S.-based full-service digital agency founded in 1999 with its headquarters in Overland Park, Kansas. Based on Salesforce products, the company provides services like data-driven marketing, commerce, collaboration and CRM solutions. DEG is a Platinum Partner of Salesforce and has about 60 Salesforce-certified resources; almost all are Marketing Cloud certified.

Strengths

Focus on marketing: DEG is solely focused on services around the marketing function of clients and combines deep strategic and technical expertise across important channels like search, social, email, paid advertising, mobile apps, websites and loyalty programs. The company's expertise in Salesforce marketing cloud is emphasized by the fact that it has been recognized, three times, as the Salesforce Marketing Partner of the Year.

Customer experience marketing: DEG has a unique approach where it orients its services around CRM implementation and toward customer-experience marketing. This approach takes into consideration channels, devices, and methods to view content and interact with companies when creating a unified system for tracking these touchpoints throughout the customer journey.

End-to-end social services: With its predefined solution, Salesforce Social Customer Care, DEG combines Salesforce Marketing Cloud and Service Cloud as well as Social Studio and Automat into a robust, cross-cloud solution that allows social media and customer service teams of clients to assign and manage tasks across social networks. Other features include automation and assigning tagging structures to provide customer agent teams the ability to prioritize cases based on keywords and factors like social influence and sentiment.

Caution

DEG should give more consideration to predefined solutions and functional accelerators to improve project efficiency for different clients.



2020 ISG Provider Lens™ Leader

DEG is a capable provider of marketing related services with the ability to develop powerful solutions based on Salesforce marketing cloud.

MAGNET360 (MINDTREE)

Overview

Magnet360, Mindtree's Salesforce practice, brings 14 years of Salesforce expertise into Mindtree's portfolio. Magnet360 focuses solely on Salesforce with expertise in the related products and across various industries. The company has its headquarters in Minneapolis, Minnesota, with a presence in other locations in the country such as New York, Chicago and Los Angeles. Magnet360 is Platinum partner of Salesforce and employs more than 350 Salesforce-certified consultants.

Strengths

Methodology: The methodology Magnet360 brings to project engagements is well developed and includes a variety of accelerators to support specific project activities. These include Code Analyzer, Org Optimizer and Risk Base Testing. Magnet360 focuses on initial project phases, where its fast-forward methodology is applied for strategy development and roadmap planning. Appropriate stakeholder participation and governance structures are also considered.

Digital experience platform: With its ConsumerConnect 360 solution, Magnet360 offers a scalable and out-of-the-box digital experience platform that can be used to directly engage with end consumers. It combines the capabilities of sales, service and marketing cloud into a multi-cloud solution accelerator. Among its various features are customer case management, customer self-service — a strong community search for specified solutions by creating personalized customer journeys, providing a community and driving engagement across multiple channels. The accelerator allows consumer brands to connect directly with customers.

Customer commitment: Magnet360 has a strong U.S. customer base and has won multiple partner innovation awards for its work with customers. The company's share of outcome-based project is higher compared with its T&M engagements, indicating that shares the responsibility for a project's success.

Caution

Magnet360 has a strong focus on agile methods, specifically in the development and implementation phases. For customers not ready for agile methods Magnet360 should offer a more hybrid phase-oriented approach.



2020 ISG Provider Lens™ Leader

Magnet360 is a capable provider of implementation services around the Salesforce marketing cloud both as a standalone application and as a multi-cloud approach.

SLALOM

Overview

Slalom is a business and technology consulting firm focused on strategy and business transformation using cloud-based platforms. The company is present in 28 cities across the U.S., U.K., and Canada, with its headquarters in Seattle, Washington. Slalom was founded in 2001, employs more than 500 Salesforce-certified consultants and is the Platinum Partner of Salesforce.

Strengths

Focus on cloud: Slalom has a strong focus on digital transformation using cloud-based platforms and applications. The company takes a holistic approach to various project situations, where it considers aspects such as company culture and individual customer experience related to the respective application.

Customer proximity: Slalom's methodology is based on inputs from a team of local consultants working with subject matter experts in a global network of expertise. In combination with a user-centric approach and agile development and implementation, this model allows high customer proximity during the project work while providing broad functional and industry expertise across different projects.

Marketing expertise: Slalom has marketing specific expertise, especially in the areas of concept-to-commercialization, customer experience strategy and omni-channel commerce. Furthermore, the company's portfolio includes several predefined function specific solutions such as a solution for cross-channel customer service. Compared to the competitors, Slalom has one of the largest shares of resources with certifications for Salesforce marketing cloud.

Strong development methodology: Slalom has the expertise in achieving continuous integration and maintenance of Salesforce applications by the use of sophisticated DevOps best practices. This includes specific tools for maintaining code as well as approaches to automate code deployments.

Caution

The portfolio of predefined functional solutions should be extended to improve project efficiency.



2020 ISG Provider Lens™ Leader

Slalom is a strong provider of strategy and implementation services for cloud-based applications, especially Salesforce, with a significant footprint in marketing cloud.

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

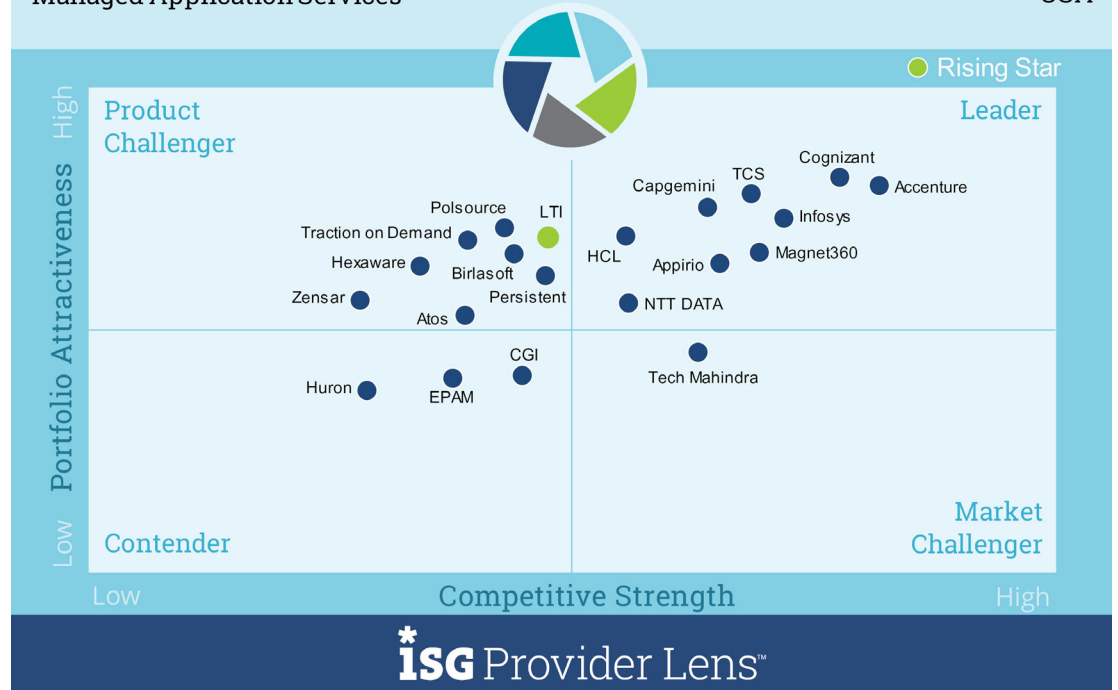
Definition

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.

ACCENTURE

Overview

Accenture is a global management consulting and professional services provider operating in more than 120 countries and offering a broad portfolio of IT services. Its Salesforce portfolio covers consulting, implementation, migration and maintenance services, where its cloud-based solutions are focused on digital transformation. Accenture reports that it has 14,000 Salesforce dedicated resources available globally, including 5,200 who are Salesforce certified, and is a global strategic partner of Salesforce. The company is headquartered in the U.S. and has a rather strong position in the market in the country.

Strengths

Scale and delivery model: Using workforce as a metric, Accenture is one of the largest providers of Salesforce-related services on a global scale. The company operates on the global delivery model that includes offshore, onshore and nearshore resources in important regions such as North America and Europe. Its expertise covers technology and business process aspects of a Salesforce solution. The company's unique position in the market is also reflected in the fact that it has Master Certifications by Salesforce in all 12 industries and all clouds currently recognized

Powerful automation: Accenture utilizes comprehensive and highly scalable automation mechanisms to provide managed application services to achieve increased efficiency in term of cost and quality.

Broad application expertise: Accenture's expertise in all major application software packages enables it to offer support in the sophisticated application landscapes that are typical for most globally operating large enterprise clients and that include Salesforce.

Caution

While Accenture's rich portfolio specifically covers large enterprise requirements, it needs to establish its credibility in supporting the application landscapes of companies with less complex needs.



2020 ISG Provider Lens™ Leader

Accenture is a leading partner for application management of Salesforce-based solutions and is best suited for large enterprises with complex requirements.

APPIRIO (WIPRO)

Overview

Appirio is a global cloud services company that focuses on Salesforce-based solutions. The company's services include strategy consulting, application design and development, implementation, system integration and managed services. Appirio was founded in 2006 and is headquartered in Indianapolis, Indiana. The company is a Global Strategic Partner of Salesforce and has about 1,250 Salesforce-certified resources worldwide. Appirio was acquired by Wipro in late 2016.

Strengths

Tool support for application management: Appirio focuses on tools and solutions that help to increase application management efficiency. For instance, the main functionalities of the tool Cloud Metrics for Salesforce are automated tests and expert analysis, measurement and examination of code and configuration complexity, object usage, security vulnerabilities and code inconsistencies. It also contains benchmarking functionalities for application operation and a scoring engine that enhances Salesforce organizations with dynamic, automated and easy-to-configure scoring capabilities.

Tool solution for development and maintenance: With its DX Desktop application, Appirio provides a comprehensive solution that supports developers in their main tasks such as source and version control, developing enhancements and upgrades. Beside the tools, this product also contains the appropriate methodology services for development and maintenance.

Sophisticated support model: With its product Thrive, Appirio offers a modular application support model specifically designed for the optimization of cloud solution operations. Built on experience, best practice, and intelligent tools, Thrive, can be tailored by using over a dozen delivery modules to create a comprehensive solution to stabilize and improve cloud-based solutions.

Caution

The strong capabilities of the parent company, Wipro, should be better represented in Appirio's portfolio to leverage synergies and reflect the cost optimization opportunities offered by its global delivery model.



2020 ISG Provider Lens™ Leader

Appirio is a highly capable provider of managed application services around Salesforce-based solutions with a strong focus on tool support.

CAPGEMINI

Overview

Capgemini is a provider of consulting, technology and outsourcing services and has a presence in 40 countries. The company's portfolio comprises services covering the entire application lifecycle and the integration of Salesforce into a client's system landscape. Based in France, the company has held a strong position in the U.S. Salesforce market since 2012. Capgemini employs more than 1,700 Salesforce certified resources and is a Global Strategic Partner of Salesforce.

Strengths

Delivery model: Operating in a global delivery model, Capgemini relies on a strong workforce that utilizes onshore as well as nearshore and offshore resources. Apart from implementation capabilities, Capgemini offers comprehensive maintenance and support services on a global scale. The company uses powerful tools such as the Salesforce Healthcheck that conducts both a technical as well as a functional check on a running application in this context.

Powerful application management model: With ADMnext, Capgemini offers a powerful model for support, maintenance and development of applications, including Salesforce. This model is primarily outcome-focused and enables clients to overcome the traditional reactive mode of application operation toward an approach that is focused on driving value from the application. Capgemini primarily offers fixed price/outcome-based services, which indicates co-responsibility in the results.

Business support: Beyond pure technology support, Capgemini offers business process-as-a-Service (BPaaS) that integrates services, processes, applications and infrastructure into a comprehensive service with a clear cost control objective.

Caution

The broad capabilities in Capgemini's portfolio should be presented in a more structured manner to enable potential clients easily comprehend the primary information about the services.



2020 ISG Provider Lens™ Leader

Capgemini is a highly capable provider of managed application services, including Salesforce, and it also offers business-processes-as-a-service (BPaaS).

COGNIZANT

Overview

Cognizant is a global professional services provider with headquarters in the U.S. It has a strong position in traditional IT services and, in the recent years, has been focusing on the digital transformation of the core business processes of its clients. The company's Salesforce practice was established more than 10 years ago and encompasses services across the entire value chain, including strategy and platform advisory. Cognizant is a Global Strategic Partner of Salesforce and employs more than 7,000 Salesforce consultants, of which 4,500 are certified.

Strengths

Strong global delivery: Cognizant has delivery presence in more than 35 countries, including four delivery centers and one digital collaboratory center in the U.S. that enable the company to serve enterprise customers globally.

Strong Salesforce relationship: Cognizant has built a strong partnership with Salesforce that goes beyond its status as an Implementation Partner. Furthermore, Cognizant is a BPO partner offering respective services for specific sales processes based upon Salesforce. Salesforce and Cognizant also have established a joint talent pool development program in the U.S.

Highly capable tool support: The company's portfolio includes a variety of powerful tools specifically designed for supporting Salesforce applications. These include solutions for automation of configuration and test case generation during upgrades, and for release management, validation, deployment, and restoration within the ongoing operation.

Investment in client success: Cognizant is engaged mainly in outcome-based services instead of capacity and volume-based models, which indicates its willingness to take co-responsibility for the operation of respective applications.

Caution

Cognizant should extend its existing capabilities to support the governance models of clients in order to help customers optimize their system strategy and manage requirements.



2020 ISG Provider Lens™ Leader

Cognizant offers top-level managed application services for system landscapes, including Salesforce.

HCL

Overview

HCL Technologies Limited offers software, information technology infrastructure, and business process outsourcing services worldwide. The company was founded in 1976 and has its headquarters in Noida, India. HCL's Salesforce practice was established in 2010 and has grown to include more than 1,700 consultants, and more than 700 are Salesforce certified. The company's portfolio covers consulting, implementation, support and integration services, including migration of applications to the Salesforce platform. HCL is the Gold Partner of Salesforce.

Strengths

Strong application management: HCL has a strong record of reliable, scalable and flexible execution of CRM application services, in general, and Salesforce, in particular. The company's portfolio includes a comprehensive set of managed services that support Salesforce-based solutions (L1/L2/L3); 24x7, 24x5, 16x5 and 8x5 support models; data quality management support; application enhancement services; transition support and vendor coordination. HCL runs a global delivery model with a high share of offshore resources and can, therefore, ensure cost-efficient implementation.

Focus on data quality: HCL has developed a cloud-based Master Data Management solution that supports integration within diverse system landscapes as well as continuous management of data quality.

Scalable agile methodology: From a methodological perspective, HCL offers post-deployment support and project work in an interrelated way, which means that support and build activities are executed together that enables the company to provide the respective services in a scalable, agile way.

Caution

The onshore presence in the U.S. should be extended to ensure better customer proximity in application management activities.



2020 ISG Provider Lens™ Leader

HCL offers a comprehensive portfolio of managed services that support the operation of Salesforce-based solutions.

INFOSYS

Overview

Infosys provides consulting and technology services globally. The company's services include architecture definition, agile implementations, global rollout execution, ecosystem integration, platform-based application modernization and support services. It was founded in 1981 and is headquartered in Bengaluru, India. Infosys has Salesforce deployment experience across industry verticals and has additional expertise with numerous ISV solution offerings based on the Salesforce platform. The company is the Platinum Partner of Salesforce and has more than 3,900 Salesforce-dedicated resources, of which more than 1,880 are certified.

Strengths

Delivery model formula: Infosys operates as a global delivery organization with several delivery centers in the U.S. that offer a mix of onshore and offshore resources contributing to cost-efficient project execution. In the recent years, Infosys has achieved strong growth in Salesforce-related market segments.

Powerful application management tools: The company's portfolio includes a variety of tools to support efficient application management. For instance, the Infosys Agile Pro-Smart Development Platform provides a comprehensive implementation environment with several automated steps (health check, continuous deployment and others) that help to increase efficiency and speed in Salesforce implementation activities. Similarly, the Code Coverage Manager is a tool that helps to monitor the code utilization of Salesforce implementations across a client organization. Another example is the Infosys Sandbox Manager that helps to manage non-production instances of Salesforce in one place and to keep them updated.

Mature contract model: The company's share of fixed-price or outcome-based projects in the U.S. is high and indicates its willingness to take co-responsibility for engagement results.

Caution

The company's global delivery model is ideal for large companies, while a higher onshore presence may be required for medium-size companies, however the company is trying to bridge this gap with acquisitions (SIMPLUS and FLUIDO).



2020 ISG Provider Lens™ Leader

Infosys is a capable provider of Salesforce-related services offering powerful application management solutions and productivity tools that are supported by a global delivery model.

MAGNET360 (MINDTREE)

Overview

Magnet360, Mindtree's Salesforce practice, brings 14 years of Salesforce expertise into the Mindtree portfolio. Magnet360 focuses only on Salesforce and exhibits its expertise in the use of all Salesforce products across industries. The company has its headquarters in Minneapolis, Minnesota, with a presence in several other locations in the U.S., such as New York, Chicago and Los Angeles. Magnet360 is the Platinum Partner of Salesforce and employs more than 350 Salesforce-certified consultants.

Strengths

Strong methodology: The methodology offered by Magnet360 is well developed and includes a variety of accelerators to support specific project activities as well as application management activities. These include Code Analyzer, Org Optimizer and Risk Base Testing that can be applied to continuously monitor, further develop and optimize Salesforce applications.

High attention to governance: Magnet360 uses a strong governance model to support cost control and manage requirement throughout an application lifecycle. For instance, the regular quarterly review with the client is used to conduct a business review, analyze current projects, determine what is working, get feedback, and to outline the next steps to be taken.

Balanced delivery model: The strong onshore presence of Magnet360 allows high customer proximity of the application management services, while the backing provided by the parent company, Mindtree, creates opportunities to leverage offshore resources.

Attention to data quality: Data management gets high attention in Magnet360's methodology, which includes measuring data quality as a part of business performance assessment. This approach allows continuous quality check on the data of productive Salesforce use.

Caution

The continuous build and support approach for application management should take into account the release-oriented aspects in complex system landscapes.



2020 ISG Provider Lens™ Leader

Magnet360 offers a strong Salesforce-related application management portfolio with focus on appropriate governance.

NTT DATA

Overview

NTT DATA is the IT services corporation within the NTT Group, a technology provider that operates worldwide. NTT DATA's Salesforce services provide enterprise-grade digital business transformation and business consulting. The services cover a broad range of client requirements — from advisory services and implementation services to management and support. The company is a Platinum Partner of Salesforce and has more than 650 Salesforce-certified resources. NTT DATA has its headquarters in Plano, Texas, while the parent company has its headquarters in Tokyo, Japan.

Strengths

Onshore resources plus nearshore and offshore support: NTT DATA's Salesforce-related workforce comprises more than 700 certified consultants, placed in a way to cover local markets and with working proximity to actual client locations by onshore consultants. NTT DATA also uses several nearshore and offshore locations in various countries. For instance, Latin America is used to serve clients in the U.S. NTT DATA operates an Innovation Center in the U.S. with significant focus on Salesforce.

Strong support models: Apart from implementation capabilities, the company's portfolio offers convincing support models for the operation of Salesforce applications, in both standalone and mixed and hybrid system landscapes. Hence, NTT DATA capabilities cover the entire application lifecycle. For the insurance and healthcare industries, in particular, NTT Data also offers business process outsourcing models, thus going beyond pure technology support.

Tool offerings: The company's portfolio includes a variety of tools supporting efficient application management. For example, it offers a framework for quality assurance and sophisticated testing.

Caution

Beyond the flexible staffing model, NTT DATA should increase options for outcome-based support models to help clients to manage the value of applications instead of achieving just cost optimization.



2020 ISG Provider Lens™ Leader

NTT DATA's Salesforce services portfolio exhibits strong application management capabilities with a highly sophisticated delivery model.

TCS

 Overview

Tata Consultancy Services (TCS) provides IT and IT-enabled services worldwide. The company has its headquarters in Mumbai, India, and serves numerous industries. Its portfolio covers the entire diaspora of digital transformation, from strategy and design over implementation to managed application services. TCS is a Platinum Partner of Salesforce and its Salesforce practice includes more than 3,500 Salesforce-related resources, and about 1,750 are certified.

 Strengths

Delivery strategy: TCS has a strong global delivery concept with a dedicated onshore presence in many countries such as the U.S. and Europe, and large offshore capabilities in India. Nearshore capabilities have also become also an important pillar in the company's delivery system. Beside project implementation capabilities, TCS's definitive strength is its strong application management offering, where the utilization of the global delivery model is the foundation for a cost-effective execution.

Customer proximity: Though the managed application services rely, to a large extent, on offshore resources, TCS is able to achieve high customer proximity with a strong onshore presence (with more than 450 in the U.S.)

Technology and more: Beyond technology-related services, TCS offers business process outsourcing in combination with Salesforce-related services. For example, the company is running marketing-cloud-related business processes for large IT technology providers.

Strong automation support: TCS offers powerful automation solutions that efficiently support application operations such as on-platform workflows or API-driven integration supported by a set of Salesforce-related RPAs.

 Caution

For large enterprise clients with sophisticated system landscapes, predefined packages for cross-product application management can enhance TCS portfolio attractiveness.



2020 ISG Provider Lens™ Leader

In the recent years, TCS has become a leading provider of Salesforce-related services and exhibits a particularly strong application management portfolio.

RISING STAR: L&T INFOTECH

Overview

L&T Infotech (LTI) is a global IT services and solutions provider with a presence in 27 countries. LTI is a part of the Larsen & Toubro Group, with interests in technology, engineering, construction, manufacturing and financial services. The company supports various technologies with focus on enterprise systems, traditionally with a large share of application management activities. The LTI Salesforce practice was established in 2014, since then, has shown significant growth. LTI is Silver Partner of Salesforce with 350-plus Salesforce professionals, and 200-plus of them are Salesforce certified.

Strengths

Strong experience with enterprise customers: LTI's portfolio benefits from the company's experience in conducting implementations for larger enterprise system landscapes across industry domains such as manufacturing, communications, media and technology and banking, financial services and insurance. These experiences are leveraged in the Salesforce environment and are evident in the variety of use cases and references. LTI serves customers across the application portfolio and by doing so provides a conducive environment for successfully managing Salesforce applications for respective customers.

Focus on regulatory requirements: LTI focuses on the corporate compliance aspects of application solutions. This also holds true for the Salesforce environment where LTI offers a comprehensive solution covering the requirements of the General Data Protection Regulation issued by the European Union.

Data quality management: Specifically, for the Salesforce environment, LTI operates a dedicated tool for master data management. This shows the company's focus on data quality, which is prerequisite for a stable and efficient operation of any application.

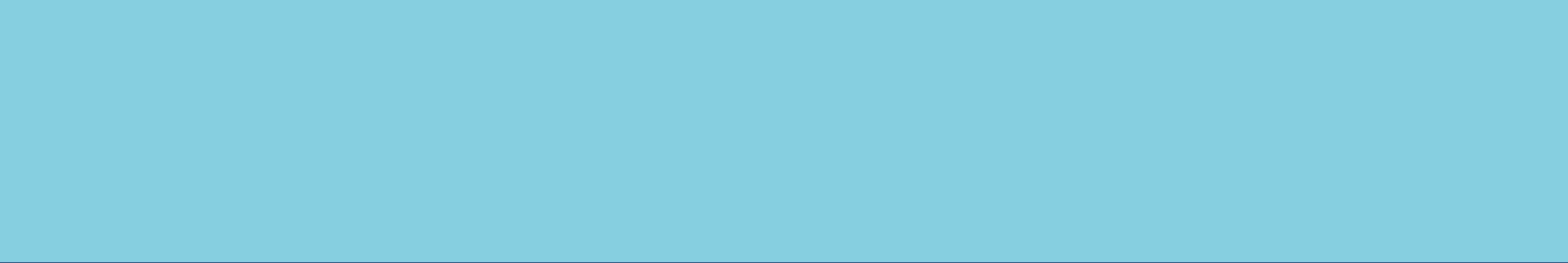
Caution

An increased onshore presence could further strengthen the customer proximity and market position of LTI.



2020 ISG Provider Lens™ Rising Star

Combining its focus on large enterprises with its growing Salesforce capacities, LTI has the potential to become a leading provider in Managed Application Services on the Salesforce platform.



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

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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

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