

The Forrester Wave: B2C Global Commerce Service Providers, Q1 2015

by Adam Silverman and Andy Hoar, February 9, 2015

KEY TAKEAWAYS

Deloitte Digital, SapientNitro, Accenture Digital, Razorfish Global, Cognizant, And IBM GBS Lead

Forrester's research uncovered a market in which Deloitte Digital, SapientNitro, Accenture Digital, Razorfish Global, Cognizant, and IBM Global Business Services lead the pack. Tata Consulting Services, HCL Technologies, Infosys, and Wipro offer competitive options.

Global Commerce Service Providers Help Drive B2C Digital Transformation

Today's eBusiness leaders are in need of deep technical implementation services as well as digital strategy services in order to meet the rising expectations of customers. GCSPs have positioned themselves (mainly through acquisitions) as a single source for digital business strategy, technology services, and digital customer experience (CX) services.

Integrating Tech, Business, And CX Services Are Key To Global Commerce Service Providers' Success

eBusiness leaders demand that their GCSPs be skilled in implementing large technology projects as well as help define and execute their digital business strategies. Improved capabilities across a broad set of commerce services including business strategy, customer experience, and technology services will dictate which GCSPs will lead the pack.

Access The Wave Model For Deeper Insight

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under "Tools & Templates." Alter Forrester's weightings to tailor the Forrester Wave model to your specifications.

The Forrester Wave™: B2C Global Commerce Service Providers, Q1 2015

The 10 Providers That Matter Most And How They Stack Up

by [Adam Silverman](#) and [Andy Hoar](#)

with [Zia Daniell Wigder](#), [Peter Sheldon](#), Herman Lee, and Laura Naparstek

WHY READ THIS REPORT

In Forrester's 77 criteria evaluation of the top 10 global commerce service providers (GCSPs), we found that Deloitte Digital, SapientNitro, Accenture Digital, Razorfish Global, Cognizant, and IBM Global Business Services lead by offering a complete suite of B2C commerce services. Tata Consulting Services, HCL Technologies, Infosys, and Wipro offer a compelling combination of digital strategy and technical execution capacity focused on B2C businesses. The purpose of this report is to help eBusiness and channel strategy professionals choose the best fit digital business partners to help them accelerate digital transformation and meet the rapidly changing expectations of customers.

Table Of Contents

2 **Today's GCSPs Must Create Experiences, Not Just Tech Solutions**

Companies Insist That GCSPs Take A More Comprehensive Approach

GCSPs Are Being Asked To Broaden Their Service Offerings

6 **Global Commerce Service Providers Evaluation Overview**

Firms Represented In Our Evaluation Have A Range Of Backgrounds

How Criteria Are Organized

Evaluated Global Commerce Service Providers Stand Out As The Best In Their Industry

11 **Global Commerce Service Providers Evaluation**

15 **Vendor Profiles**

Leaders

Strong Performers

Other Vendors Worthy Of Consideration

19 **Supplemental Material**

Notes & Resources

Forrester conducted executive briefings in October and November 2014 to evaluate the vendors included in this report.

Related Research Documents

[Commerce Service Providers Market Overview: Changing Market Dynamics Drive New Strategies And Alignments](#)
September 4, 2014

[Market Overview: Digital Experience Service Providers](#)
February 26, 2013

[The Forrester Wave™: Global Commerce Service Providers, Q1 2012](#)
February 24, 2012



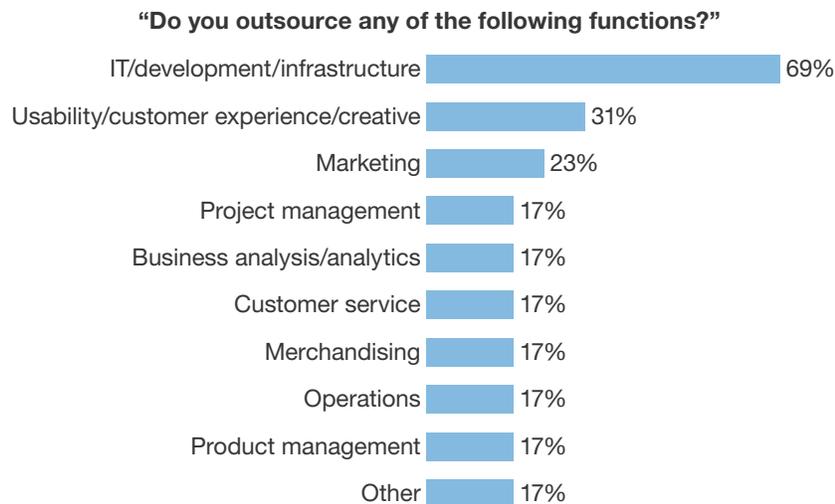
TODAY'S GCSPS MUST CREATE EXPERIENCES, NOT JUST TECH SOLUTIONS

The complexity of commerce technology projects continues to increase, and the impact of these technologies on customer experience is rapidly rising. The stakes are getting even higher for today's eBusiness leaders, and increasingly these leaders are seeking commerce partners that can not only implement commerce technology flawlessly, but can also help define, develop, deploy, and, in some cases, operate the client's digital business and strategy.

eBusiness professionals need partners that can handle the functions they increasingly need to outsource such as IT development, usability, and marketing (see Figure 1). In addition, they require partners that can offer an integrated view of their businesses — from understanding customer behavior to creating and meeting new omnichannel business objectives, to selecting and implementing modern commerce technology infrastructure.

In short, they need global commerce service providers (GCSPs). GCSPs are firms that have deep roots in — and in many cases grew up as — technology services firms, digital and interactive agencies, and management and business consulting firms. However, these firms have evolved well beyond these original business models in recent years. These are companies that are now large, vertically-integrated organizations that offer services from the breath of the front office to depths of the back office — all in the name of driving a world-class customer experience from beginning to end. Best-of-breed GCSPs have shifted from being focused on IT projects to business technology (BT) projects that help acquire, service, and retain customers on behalf of their clients. Forrester's research indicates that eBusiness professionals expect to increase their spending with these firms in the next twelve months (see Figure 2).

Figure 1 Most Firms Rely On Technology Outsourcing



Base: 52 eBusiness & channel strategy professionals

Source: Forrester's Q3 2014 Global eBusiness And Channel Strategy Online Panel Survey

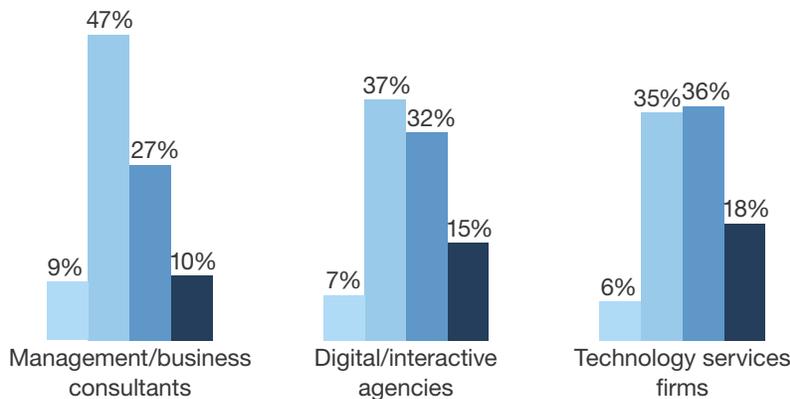
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Figure 2 Decision-Makers Expect To Increase Spending With Global Commerce Service Providers

“How do you expect your business unit or IT department’s spending with third-party business/management consultants, digital agencies, or technology services providers to change over the next 12 months?”

■ Decrease 5% or more ■ Stay about the same ■ Increase 5% to 10% ■ Increase 10% or more



Base: 1,532 global business and technology services decision-makers
(not all responses shown)

Source: Forrester’s Business Technographics® Global Business And Technology Services Survey, 2014

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Companies Insist That GCSPs Take A More Comprehensive Approach

As we wrote in recent research on commerce service providers, digital is radically transforming businesses, and today’s companies need GCSP partners in order to keep up. eBusiness and channel strategy professionals are increasingly relying on GCSPs to bridge gaps in digital domain expertise and technology savvy (see Figure 3).¹ They are also setting a high bar for selecting a GCSP (see Figure 4). In addition, companies are looking to GCSPs for support in establishing digital-first internal processes and in structuring eCommerce organizations. GCSPs are helping B2C and B2B companies face a variety of new challenges including, but not limited, to:

- Reacting to customers’ omnichannel demands.** Increasingly, both B2C and B2B customers are demanding real-time visibility into both pricing and inventory. Such demands are forcing companies to upgrade ERP systems that house such information as well as order management systems that manage SKUs across several channels — in some cases in multiple geographies, languages, and currencies.² In addition, both B2C and B2B customers are making exponentially greater use of smartphones and tablets to research and buy products and services. As such, clients are asking GCSPs to develop technology platforms to support mobile assets as quickly as possible.

- **Integrating disparate systems.** Many companies simply do not possess the expertise in-house to integrate their internal systems. In many cases, they're dealing with difficult legacy systems (especially on the back end) — and will continue to deal with legacy and custom-built systems for some time to come. In fact, nearly one-quarter of companies report still using homegrown eCommerce systems.³ Unlike newer systems that often come with APIs and connectors included, older systems require a more inefficient approach that usually involves building interfaces. Increasingly, companies are bringing on GCSPs to help them do that work.
- **Realigning organizations and business processes.** As companies become more digital, eBusiness and channel strategy professionals are turning to their GCSP partners to help them evolve both their staffing and their organizational structures. More mature eCommerce companies have found that becoming truly digital has necessitated significant process changes and organizational realignments. Companies we interviewed report elevating eCommerce directors to senior marketing positions such as CMO and transitioning technology budgets out of technology management (TM) and over to “digital or eCommerce” leadership.
- **Developing new deployment and payment models.** Companies today are increasingly looking to GCSPs for guidance regarding hosted solutions, managed solutions, and even outsourced staffing options in order to accelerate their eCommerce operations. With many companies moving eCommerce operations into the cloud and expecting to pay on a monthly subscription basis from operation expenditure (OpEx) budgets, eBusiness professionals are increasingly asking GCSPs for performance-based contracts as opposed to the more conventional time and materials approach.
- **Serving multiple channels and partner models.** GCSPs are increasingly being asked to help B2C and B2B companies develop channel-specific strategies that enable clients to both acquire new customers and retain existing customers. For manufacturers in particular, selling online necessarily involves navigating a complex and delicate web of direct and indirect selling channels. Selling simultaneously in several competing and complementary channels raises a variety of questions regarding challenging and complicated inventory, pricing, and sales attribution issues.

Figure 3 Companies Engage With GCSPs On A Variety Of Projects

“For which of the following have you previously (in the past 24 months) employed the services of a systems integration firm or digital agency?”



Base: 85 eBusiness and channel strategy professionals

Source: Forrester's Q1 2014 Global eBusiness And Channel Strategy Online Panel Survey

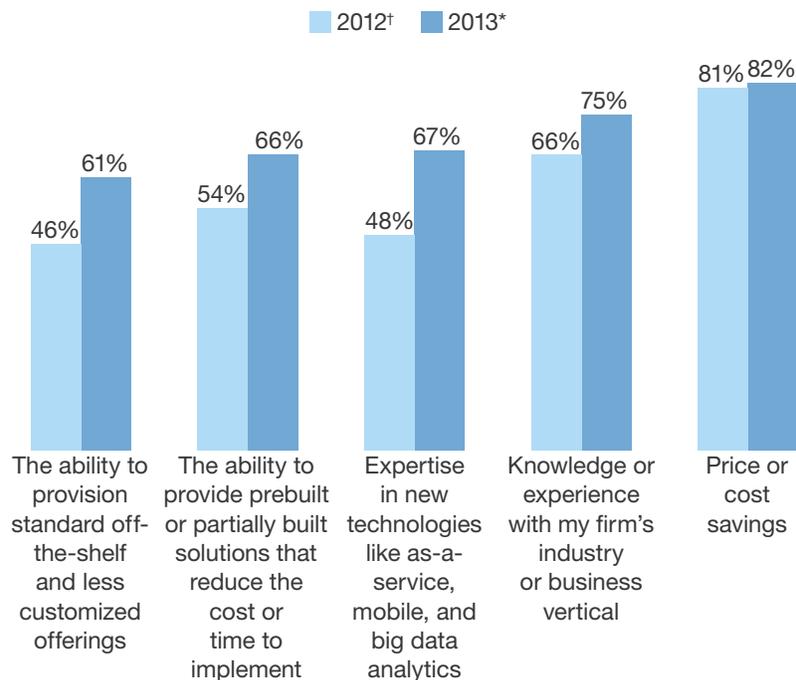
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Figure 4 Criteria That Matter When Selecting A GCSP

In 2012 and 2013, price or cost savings was most important to firms choosing GCSPs

“How important are the following criteria to your firm when selecting IT service providers?”
 (responses of 4 or 5 on a scale from 1 [not at all important] to 5 [very important])



Base: †1,058 and *1,050 North American and European IT services decision-makers (1,000+ employees)

Source: Forrester's Forrsights Services Survey, *Q3 2013 and †Q2 2012

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GCSPs Are Being Asked To Broaden Their Service Offerings

Increasingly, others in the organization (such as senior marketing leadership and customer service groups) are asking GCSPs to engage in large scale infrastructure and strategy projects. In addition, all professionals from across the organization are asking GCSPs to broaden beyond the conventional services. As we discussed in recent research, today's GCSPs are being challenged to:⁴

- Perform talent acquisition and organizational design planning.** Forrester's research shows that companies are most challenged in hiring technology and customer experience professionals. The problem is even more acute for B2B companies. In response, many GCSPs are now building organizational planning and talent acquisition into their digital design plans from the

start. Some GCSPs are even offering their own version of temporary outsourcing services to companies (e.g., interim VPs of eCommerce) to help clients stand up an initial digital operation.

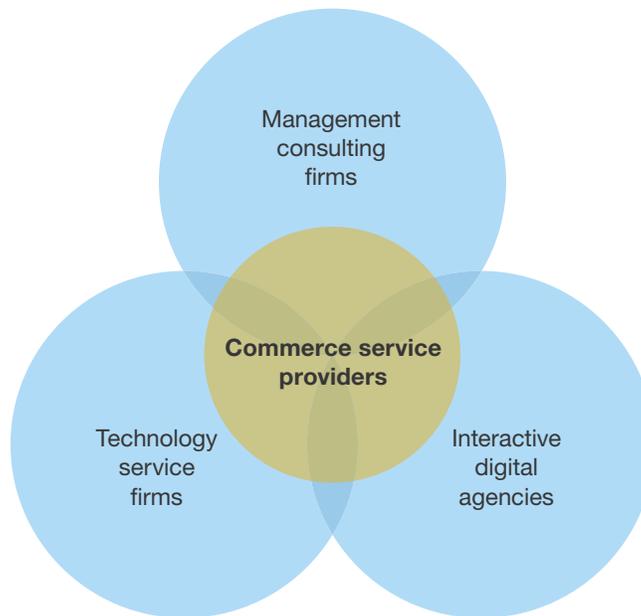
- **Offer eCommerce infrastructure and operations services.** GCSPs have been thrust into new roles in which they perform advanced automated site testing, offer performance management services, and conduct extensive security testing on cloud-based platforms. This is due to clients seeking out cloud platforms as a way to accelerate software development without having to build, host, or manage complex server infrastructure. By offering such shared resources, GCSPs succeed in providing cloud-hosted managed services that lower the total cost of ownership of commerce applications and speeding time-to-market.
- **Provide channel optimization and growth strategy consulting.** Digital B2C businesses are struggling to overcome complex changes in their business. They're seeing competition not just from other omnichannel retailers, but also from pure-plays, and the role of the branch or store is rapidly evolving. Such challenges have forced GCSPs, in their capacity as trusted advisors, to augment their knowledge in both channel optimization and business growth strategy. In addition, GCSPs are now required to develop expertise in product pricing strategies, inventory management and logistics strategies, and cross-channel analytics and attribution.
- **Generate innovation.** The outside perspective that GCSPs bring to their clients is instrumental in driving innovation. This fresh view coupled with the structure and experience to operate an innovation lab positions GCSPs to be catalysts for innovation for their clients. B2C businesses rely on service providers to help deploy pilots and trial emerging technology and customer experiences.
- **Understand the complete 360 degree view of the customer.** Today's modern commerce technologies offer unprecedented capabilities to communicate with customers individually and provide highly personalized content and experiences. However, these technologies are not without their challenges, especially as they relate to deciphering customer behavior across multiple touchpoints. B2C businesses are increasingly calling upon GCSPs to leverage customer and product data (both structured and unstructured) in order to generate a single view of the customer. This view of the customer can be used by the service provider to model marketing mix, optimize the supply chain, and provide an exceptional omnichannel experience in store and online.

GLOBAL COMMERCE SERVICE PROVIDERS EVALUATION OVERVIEW

To assess how well these global commerce service providers meet the evolving needs of our clients and to determine how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top global commerce providers across a range of strategy, customer experience design, technology, and managed services capabilities (see Figure 5). The firms included in the evaluation all have capabilities across the spectrum of services included, although their heritage as

service providers varies. Compared to our last evaluation in 2012, Forrester has now placed greater emphasis on digital business strategy and the ability to leverage a deluge of data and insight to drive the performance of commerce technology applications.

Figure 5 Global Commerce Service Providers Operate At The Intersection Of Three Distinct Skill Sets



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Firms Represented In Our Evaluation Have A Range Of Backgrounds

In this evaluation, Forrester focused on the leading vendors that have proven experience delivering successful omnichannel direct-to-consumer commerce projects. The vendors we evaluated offer similar types of services, although their backgrounds as service providers include (see Figure 6):

- **Firms with a management consulting background.** This report includes three firms with a background as multinational management consultancy firms, Accenture Digital, Deloitte Digital, and IBM Global Business Services. Both of these firms have significant experience delivering a range of consulting services to digital businesses. Although commerce technology and design services have traditionally been a small part of their respective businesses, the sheer size of these organizations means they are driving a significant number of commerce projects.

- **Firms with an interactive digital agency background.** The report includes two firms with backgrounds as interactive digital agencies: Razorfish Global and SapienNitro. Both of these firms have been acquiring new capabilities to fill past gaps, and now have solid capabilities to implement, integrate, and support commerce technology programs as well as create impactful digital experiences.

- **Firms with a technology services background.** The report includes five firms with backgrounds as systems integrators: Cognizant, HCL Technologies, Infosys, Tata Consultancy Services (TCS), and Wipro. Based on client needs, all of these firms have added or matured capabilities in digital business strategy and design to their systems integration competencies, though to varying degrees. In addition, these large firms are becoming more nimble by employing innovation labs and leveraging Agile development methodologies.

Figure 6 Evaluated Vendors: Vendor Information And Selection Criteria

Vendor	Date Evaluated
Accenture Digital	October 2014
Cognizant	November 2014
Deloitte Digital	October 2014
HCL Technologies	November 2014
IBM Global Business Services	October 2014
Infosys	November 2014
Razorfish Global	October 2014
SapientNitro	November 2014
Tata Consultancy Services	November 2014
Wipro	October 2014

Vendor selection criteria

The vendors had a dedicated commerce service practice with at least five years of experience implementing complex B2C omnichannel commerce projects at the time of data collection.

The vendors had proven implementation expertise around at least three eCommerce platforms and were able to demonstrate client experience integrating enterprise platforms including commerce, CRM, OMS, PIM, and CMS.

The vendors demonstrated an ability to deliver B2C omnichannel commerce projects and for enterprise-class organizations across a diverse set of industry verticals and global markets.

Vendors included in this evaluation had at least 400 full-time employees dedicated to sales, support, training, and consulting services for omnichannel commerce.

The vendors demonstrated experience guiding clients through omnichannel B2C commerce projects and delivering business intelligence and customer insights. Vendors included had a proven portfolio of delivering CX, implementation, and strategic services or large market-leading system integration with an emerging strategy practice.

Vendors included in this evaluation reported revenues above \$150 million and have significant mindshare among Forrester’s client base.

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How Criteria Are Organized

After examining past research, user needs assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 77 criteria, which we grouped into three high-level buckets:

- **Current offering.** Forrester's criteria to assess the strength of the vendors' current offerings were weighted evenly between expertise in commerce technology solutions as well as expertise in customer engagement and omnichannel strategy. Although eBusiness leaders engage these firms to implement and integrate commerce technologies including commerce platforms, order management, content management, and a wide range of point solutions, they are now asking these firms to provide a more complete set of services from consulting on omnichannel business process optimization to development of digital store technologies such as mobile point of service (mPOS). We evaluated each vendor against the following: omnichannel and commerce strategy, customer engagement and experience services, implementation services, managed services, hosting support, and solution expertise.
- **Strategy.** We examined each vendor's strategy for evolving its capabilities to meet the changing needs of clients, its vision for commerce solutions in the future and industry expertise, and plans to support its clients across global markets. In addition, we looked at each vendor's set of commerce accelerators as well as its ability to create innovative commerce solutions on behalf of its clients.
- **Market presence.** eBusiness and technology leaders must look for service providers with a strong and stable customer base, steady growth, and a network of partners. To determine current market presence for our evaluation, we combined information about each vendor's current customer base, recent sales momentum, revenues, relative size of each vendor's commerce practice, and financial resources to support its strategy and growth.

Evaluated Global Commerce Service Providers Stand Out As The Best In Their Industry

Forrester evaluated 10 service providers in this assessment: Accenture Digital, Cognizant, Deloitte Digital, HCL Technologies, IBM Global Business Services, Infosys, Razorfish Global, SapientNitro, Tata Consultancy Services, and Wipro. While we considered a wide range of services firms for this assessment, each of these firms has:

- **A significant focus on commerce solutions.** Although many of the firms we evaluated have significant business across a range of solutions, each of these firms has a significant commitment to serving clients with B2C and B2B eCommerce and omnichannel commerce programs.
- **The ability to support large and complex clients across multiple verticals.** Each of these firms has a stable of clients that represent complex and mature online and omnichannel business in need of enterprise-class digital business strategy and commerce technology solutions. These clients cross verticals including retail, travel, consumer products, manufacturing, media and entertainment, and telecommunications. These firms can largely support clients across the key markets of North America, Europe, and Asia Pacific. Forrester defines enterprise-class as solutions serving companies with more than \$1 billion in total sales, or total eCommerce transactions of more than \$100 million annually.

- **A profitable or stable business with client momentum.** To ensure that the vendors we evaluated will remain viable in this evolving market, Forrester limited its analysis to firms that have the resources and momentum to sustain themselves through variable market conditions. Each of these firms has significant experience in implementing and supporting digital business transformation programs and has shown growth in its commerce services practice.

Forrester did not include dedicated commerce technology vendors in this assessment. We have written separate research on commerce platforms and related technology providers such as vendors of web content management (WCM) solutions, product information management (PIM) solutions, content management systems (CMSes), and order management systems (OMSes) such as Adobe, Demandware, hybris, IBM, Oracle, and others. Many of these firms provide commerce services around their specific solutions.

GLOBAL COMMERCE SERVICE PROVIDERS EVALUATION

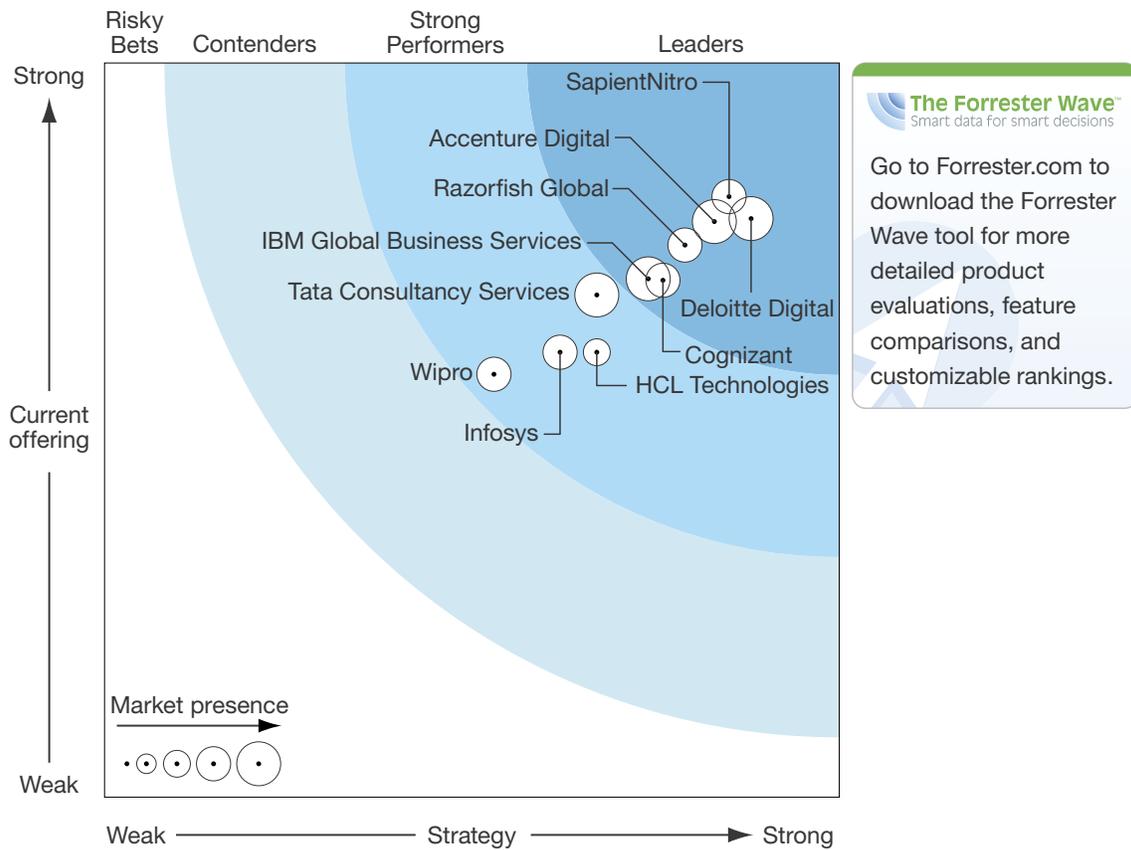
Global commerce service providers are playing an increasingly important role in the digital transformation of B2C organizations across many verticals. Along with offering deep expertise in integrating eCommerce platforms and other commerce applications, GCSPs are bulking up on customer experience capabilities through numerous acquisitions or by standing up dedicated digital customer experience business units. Over the past few years, we have seen these organizations significantly augment their commerce services capabilities, and today these organizations look more similar than they did at the time of our last evaluation in 2012. Our evaluation uncovered a more homogenous set of vendors in which (see Figure 7):

- **Deloitte Digital, SapientNitro, Accenture Digital, Razorfish Global, Cognizant, and IBM Global Business Services lead by offering a complete suite of B2C commerce services.** These firms have been augmenting and building a broad set of commerce services for many years now, and represent a mature and highly effective group of global commerce service providers. While their pedigree varies, each firm offers its clients strong digital commerce strategies and significant technology implementation and execution experience. They play a critical role in defining the future state of digital business together with their clients. In order to create differentiation, these organizations are venturing out and building proprietary software to accelerate time-to-market for new commerce applications, as well as offering innovative real-time analytics solutions that improve the customer experience and operational efficiency. For those firms that were a part of a recent acquisition, Forrester expects these organizations to unlock new value for their clients by integrating capabilities across their portfolios of services.
- **Tata Consulting Services, HCL Technologies, Infosys, and Wipro offer a compelling combination of digital strategy and technical execution capacity focused on B2C businesses.** Each of these firms has maturing digital strategy and omnichannel practices that are, to varying degrees, closing the gap with vendors in the Leaders category. These emerging capabilities, coupled with their existing experience in technology services, position this group of vendors

well for rapid growth. These Strong Contenders have an opportunity to break through in the next few years and challenge Leader GCSPs by doing B2C digital transformation work that goes beyond either mostly technology transformation or customer experience work.

This evaluation of the global commerce service providers market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 7 Forrester Wave™: B2C Commerce Service Providers, Q1 2015



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Figure 7 Forrester Wave™: B2C Commerce Service Providers, Q1 2015 (Cont.)

	Forrester's Weighting	Accenture Digital	Cognizant	Deloitte Digital	HCL Technologies	IBM Global Business Services	Infosys	Razorfish Global	SapientNitro	Tata Consultancy Services	Wipro
CURRENT OFFERING	50%	3.92	3.52	3.94	3.03	3.53	3.03	3.76	4.09	3.42	2.88
Background information	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Omnichannel, commerce strategy, and consulting	25%	3.95	3.40	4.40	2.55	3.35	2.75	3.65	4.00	3.65	2.60
Customer engagement and experience services	25%	4.00	3.33	4.00	2.33	3.33	2.33	4.33	4.66	2.34	2.33
Implementation services	15%	4.00	3.90	3.50	3.75	3.70	3.75	3.60	4.00	4.05	3.55
Managed services	5%	3.60	3.75	3.25	3.65	3.80	3.65	3.00	3.65	3.85	3.60
Hosting support	5%	3.20	3.00	3.00	4.00	4.20	3.60	3.00	3.00	4.00	3.00
Solution expertise	25%	3.95	3.65	4.00	3.45	3.60	3.35	3.70	3.95	3.70	3.15
STRATEGY	50%	4.15	3.80	4.40	3.35	3.70	3.10	3.95	4.25	3.35	2.65
Corporate strategy	5%	4.00	3.00	4.00	3.00	3.00	3.00	4.00	4.00	4.00	3.00
Commerce services focus	15%	4.00	4.00	4.00	3.00	4.00	3.00	4.00	4.00	4.00	3.00
Industry strategy	5%	5.00	4.00	5.00	4.00	3.00	4.00	4.00	4.00	4.00	4.00
eCommerce focus	15%	4.00	4.00	4.00	4.00	4.00	4.00	4.00	5.00	3.00	3.00
Omnichannel commerce focus	15%	4.00	4.00	5.00	3.00	3.00	3.00	4.00	4.00	3.00	2.00
Digital business transformation focus	15%	5.00	4.00	5.00	2.00	4.00	2.00	4.00	4.00	3.00	2.00
Innovation and digital acceleration	10%	4.00	3.00	4.00	4.00	4.00	3.00	4.00	5.00	4.00	2.00
Mobile commerce focus	15%	4.00	4.00	4.00	4.00	4.00	3.00	4.00	4.00	3.00	3.00
Pricing structure	5%	3.00	3.00	5.00	4.00	3.00	4.00	3.00	4.00	3.00	3.00
MARKET PRESENCE	0%	4.37	3.50	4.22	2.81	4.73	3.92	3.66	3.94	4.04	3.25
Clients	40%	5.00	2.75	3.75	2.00	5.00	3.00	3.75	4.25	4.75	2.00
Financials	30%	4.40	4.55	4.20	3.85	4.60	4.70	3.70	3.90	4.30	4.45
Global presence	20%	3.85	4.25	5.00	2.90	5.00	5.00	3.75	3.75	2.30	3.95
Vertical presence	10%	2.80	1.85	4.60	2.70	3.50	3.10	2.95	3.20	3.90	3.20

All scores are based on a scale of 0 (weak) to 5 (strong).

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VENDOR PROFILES

Leaders

Leaders in our B2C GCSP evaluation include:

- **Deloitte Digital.** Deloitte Digital is often called upon by large B2C organizations to help transform their digital business strategies and processes and to modernize their commerce technology. Deloitte Digital can employ a performance-based pricing model that aligns with its clients' performance metrics. In addition to the strategy and planning services, Deloitte Digital has built up a commerce practice with technology expertise around leading eCommerce, call center, and in-store technologies, although it still frequently outsources these functions to other system integrators. Products and accelerators like MarketMix allow clients to rapidly deploy leading digital experience and commerce technology. Clients we spoke to said Deloitte Digital is a trusted partner for both strategy and execution at both the customer engagement and technical implementation level.
- **SapientNitro.** SapientNitro is an experience-centric marketing and technology services firm that has its roots in front-end design strategy. SapientNitro is strong in the retail and branded manufacturing space and offers an array of commerce platform selection capabilities. The firm is a consistent performer on implementation services and boasts strong B2C mobile, analytics, and innovation functions. SapientNitro is further developing both its B2C and B2B industry focus and managed services capabilities, as well as testing more flexible pricing models. Clients of SapientNitro told us that the firm is skilled at commerce platform implementation and delivering effective customer experience work — in particular story flow and user scenarios.
- **Accenture Digital.** Accenture Digital is a global consulting company that offers the full stack of services ranging from back-office expertise to customer-facing front-end capabilities. With the acquisition of Acquity Group, Accenture Digital has carved out particularly strong offerings in commerce platform selection, data management, and digital business strategy. Accenture Digital is actively investing in its innovation lab, building out eCommerce accelerators and growing a promising analytics practice. The company has an especially large global client base and has carved out a relatively strong position in both B2B and B2C businesses. With the acquisition of Acquity Group still relatively new, synergies between Accenture Digital and Acquity Group are still being developed. Clients of Accenture Digital indicate that the firm possesses deep experience in commerce strategy and application integration work, even in the face of changing requirements and timelines and multiple tracks of work.
- **Razorfish Global.** The past year saw the convergence of multiple agencies to form Razorfish Global, creating a complete commerce services firm with expertise in implementing enterprise commerce applications as well as delivering compelling digital customer experience projects. Razorfish Global was formed by consolidating four agencies — Razorfish, Rosetta, digital

agency Level, and design firm Nurun — into one entity. Mid-last year, Razorfish Global acquired Crown Partners, experts in integrating hybris and Adobe products. In addition to expertise in implementing top-tier commerce platforms, Razorfish Global is also skilled at leveraging data to generate insights, and using those insights to maximize its commerce integrations and digital customer experiences. On paper, collectively, these firms provide a holistic set of commerce services supporting Adobe, Demandware, hybris, IBM, and Oracle. While the consolidation of these agencies into Razorfish Global is still new, the company's success in integrating each agency into one cohesive services firm is beginning to unfold. The Razorfish Global clients with whom we spoke indicated that the firm was particularly strong in the content management space. They also indicated that they thought favorably about the consolidation of several former independent GCSP brands (e.g., Rosetta, Crown Partners) under the Razorfish Global roof.

- **Cognizant.** Cognizant is augmenting its legacy development and software integration experience with a set of omnichannel strategy and emerging digital customer experience capabilities. The firm excels in program management and Agile development, as well as business functions such as social analytics, mobile development, and omnichannel fulfillment strategy. In addition, Cognizant has demonstrated experience in leveraging data to improve performance and customer engagement. It offers services in a broad set of industries such as retail, manufacturing, and financial services, and has experience implementing top tier commerce platforms. Its customers told us that the firm differentiates itself with its program management initiatives and actively leads discussions with clients about the future of specific technologies and markets.
- **IBM Global Business Services.** IBM Global Business Services (GBS) is a global, analytics-driven global commerce service provider. While IBM GBS still focuses more heavily on supporting IBM stack technologies, the company implements systems for a variety of other world-class eCommerce vendors (SAP, Oracle, etc.) as well as broader eCommerce ecosystem software players in the CRM, ERP, and other spaces. IBM GBS excels at analytics-centric work (most notably implementing Watson-driven technology solutions) and executing on key supporting services for eCommerce development such as testing and privacy services. The company is actively building expertise in, but still in development on, digital business restructuring and cloud-based services. IBM itself has made some recent high-profile announcements in the mobile experience space by partnering with Apple to create a series of native iOS apps focused on enterprise employees. Although IBM GBS offers a wide variety of services and software, these capabilities are often managed in silos and lack the internal integration to create a holistic commerce services offering. IBM GBS clients expressed in interviews that IBM GBS is a reliable partner with a breadth of experience in technology integration as well as business strategy.

Strong Performers

Strong Performers in our B2C GCSP evaluation include:

- **Tata Consulting Services.** Tata Consulting Services (TCS) is a large IT services, consulting, and business solutions partner with a broad array of industry experience. The majority of its commerce work is focused on commerce development and program management. TCS has created numerous commerce accelerators for top eCommerce platforms, with each accelerator focused on a unique industry or vertical. Its development work is augmented with automated tools designed to gather requirements faster and identify conflicts before they arise. In addition, TCS offers digital customer experience and strategy services through its Premier Digital Group. Its digital services also focus on addressing the in-store experience through its mobile point of service (mPOS) and associate enablement tools. TCS's customers stated that the company specializes in focused and flexible technical delivery and that the firm's focus on its growth is apparent. Although TCS excels at program management, clients indicated a desire for TCS to "step up" and provide more business consulting services.
- **HCL Technologies.** Long a fixture in the systems integration and offshore IT space, HCL has made the transition into the digital business space and has begun to offer front-end design and strategy consulting services. Traditionally strong in technical implementation and supporting services like testing, HCL now finds itself building out omnichannel customer engagement and customer experience-driven mobility solutions. The company has developed a number of productized eCommerce tools and offers a set of platform-specific accelerators that offer time-to-market and time-to-value advantages. HCL is being guided by a corporate strategy that is still early in its life cycle and the company is in the process of developing industry-specific expertise and domain knowledge. The company is expanding globally and has a relatively strong presence in Asia. Clients we contacted spoke highly of HCL's classic systems integration skills and expressed a desire to see HCL bolster more of its front-end design capabilities.
- **Infosys.** Infosys has begun to augment its strong commerce project management and technical foundation with digital strategy and user experience practices. Although the organization has made a strong push into these new areas, its offering is still evolving and not as strong as its technical implementation skills. Infosys has created many custom accelerators and applications to speed integration and augment capabilities such as personalization. The firm has a mature practice around IBM (Sterling) and Oracle order management technologies, which will benefit clients that are undertaking omnichannel fulfillment projects. Infosys has focused its commerce services around Oracle, IBM, Hybris, and Demandware. Infosys' clients spoke highly of the company's offshore technical implementation resources and the agility, responsiveness, and flexibility inherent in its project management approach.
- **Wipro.** Wipro has made progress building upon its core development and program management capabilities in order to meet the needs of digital businesses. In 2014, it created Wipro Digital, a separate business unit focusing on digital customer experience design and

strategy. In addition, Wipro continues to create new applications to help accelerate the deployment of eCommerce and WCM solutions for its clients. However the majority of Wipro's commerce services still remains focused on offering implementation services and managed solutions. Covering a wide set of industries, Wipro has implementation experience focused on the top eCommerce platforms as well as order management and web content management. Wipro's clients told us that the firm is strong at implementing commerce applications and has built multi-layered "benches" of skilled developers that the company can mobilize in anticipation of client needs.

Other Vendors Worthy Of Consideration

The GCSP landscape is a diverse and evolving space. Beyond the evaluated vendors, the space includes several alternative vendors that fall into two groups: digital agencies and boutiques. In the course of our research for this Forrester Wave evaluation, we discovered several other vendors that filled niches and voids in the GCSP space. Our evaluation identified several other vendors worthy of consideration by the following categories:

- **DigitasLBI.** DigitasLBI describes itself as a global "connected commerce" specialist with expertise in customer experience design, digital marketing, as well as with integrating commerce technologies. Through its acquisition of systems integrator Seneric in 2012, DigitasLBI has rounded out its agency background by expanding its commerce technology capabilities, especially in Demandware, hybris, and Oracle. DigitasLBI is the largest digital agency within the Publicis Group, operating in 26 countries with over 6,700 employees.
- **EPAM.** Combining its heritage of technology services with investments into experience design and consulting capabilities, EPAM represents a class of vendors focused on large omnichannel initiatives. EPAM help clients execute complex technology-driven customer experience programs by leveraging its 20 years of experience in commerce software product development. Commerce is EPAM's largest revenue segment, with experience in the banking and finance, retail, travel, and media verticals and experience with clients in North America, Europe, and more recently Asia. In the last two years, EPAM acquired two design firms, Empathy Lab and Great Fridays, creating EPAM Empathy Lab, a practice focused on experience design and the integration of physical and digital touchpoints in commerce.
- **Salmon.** In business for over 25 years, UK-based Salmon is a well-rounded global commerce service provider with origins as a marketing agency. Although Salmon is a smaller organization than the firms who participated in this Forrester Wave evaluation, the company is a subsidiary of the WPP Group, the world's largest communications services group. Operating as an independent entity within WPP has given Salmon the ability to retain its boutique feel while still having access to the conglomerate-scale resources of WPP's larger organizations. Salmon has completed the largest grocery replatform project in the world for Sainsbury's, and also

develops and supports innovative omnichannel fulfillment initiatives at Argos, the UK's second largest online retailer. Salmon's range of services includes customer experience, end-to-end architecture design, migration services, and robust testing and analytics capabilities.

- **Capgemini.** With more than 130,000 people in 40 countries, Capgemini is one of the world's largest integrated consulting, technology, and outsourcing services firms. The company takes an industry-specific approach to client engagement and offers an integrated suite of digital services within several large industries including retail, financial services, utilities, and telecommunications. Capgemini's sheer size, with reported 2013 global revenues of just over \$12 billion, warrants its inclusion in this list.
- **Smith.** A boutique firm that bills itself as "an independent digital experience agency grounded in technology," Smith has a long history of doing both digital agency and systems integration work in both the eCommerce and CMS spaces. For several years, Smith enjoyed a deep relationship with CommerceService.net (now Sitecore Commerce) and in recent years has performed dozens of projects on dot net platforms, Magento platforms, and hybris platforms. Headquartered in Seattle, Washington with several offices across North America, Smith performs GCSP-grade projects on a global basis and has done significant work for B2C clients such as AT&T, McDonalds, and Publix.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 7 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Executive briefings.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two to four of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have products or services that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave evaluation follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Forrester conducted its Business Technographics® Global Business And Technology Services Survey, 2014, a mixed methodology phone and online survey fielded in July and August 2014 of 1,532 business and technology decision-makers located in Australia, Brazil, Canada, France, Germany, India, New Zealand, the UK, and the US from companies with 100 or more employees.

Each calendar year, Forrester's Business Technographics fields business-to-business technology studies in 10 countries spanning North America, Latin America, Europe, and Asia Pacific. For quality control, we carefully screen respondents according to job title and function. Forrester's Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Forrester's Forrsights Services Survey, Q2 2012 was fielded to 1,058 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from enterprise companies with 1,000 or more employees. This survey is part of Forrester's Forrsights For Business

Technology and was fielded during May and June 2012. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives include gift certificates and research reports. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forrsights Services Survey, Q3 2013, was fielded to 1,050 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from enterprise companies with 1,000 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during August 2013 and September 2013. ResearchNow fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Forrsights For Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights For Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Integrity Policy

All of Forrester's research, including Forrester Wave evaluations, is conducted according to our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

ENDNOTES

- ¹ To read a full market overview of global commerce service providers, see the September 4, 2014, "[Commerce Service Providers Market Overview: Changing Market Dynamics Drive New Strategies And Alignments](#)" report.
- ² For more information about what B2C customers need when it comes to their commerce back end, see the July 29, 2014, "[The Forrester Wave™: Omnichannel Order Management, Q3 2014](#)" report and see the January 13, 2015, "[The Forrester Wave™: B2C Commerce Suites, Q1 2015](#)" report.
- ³ For more information about eBusiness professionals' commerce technology investments, see the September 22, 2014, "[Commerce Technology Investment And Platform Trends — 2014](#)" report.
- ⁴ To read a full market overview of global commerce service providers, see the September 4, 2014, "[Commerce Service Providers Market Overview: Changing Market Dynamics Drive New Strategies And Alignments](#)" report.

About Forrester

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