ISG Provider Lens™

Salesforce Ecosystem Partners

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

QUADRANT REPORT | MARCH 2023 | U.S.

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Continuous growth of Salesforce and shift to Salesforce industry clouds drive demand for implementation services.

Since its founding in 1999, Salesforce has shown impressive growth and is now one of the leading providers of cloud-based application systems in the form of Software as a Service (SaaS). Its revenue growth rates have been between 24 to 29 percent in the past five years. Although the company has now reached a level where it becomes challenging to maintain this growth, Salesforce is likely to continue at the same pace in the years ahead. In the post-pandemic era, the environment has become increasingly favorable for additional investments in digital transformation of most core processes within enterprises. Salesforce is likely to benefit from this global trend.

The expected high growth rates will aggravate the limited availability of qualified resources with Salesforce expertise, which has already been a key limiting factor for the number of implementations in the past. Specifically, in the U.S., this trend led to significant consolidation pressure in the market for corresponding services, with large system integrators trying to expand their resource base by taking over other providers. Interestingly, Salesforce sped up this trend as it started to expand its own capacities for implementation services. Salesforce has acquired two large providers of implementation services, Acumen and Traction on Demand, in the past two years, and this has significantly contributed to the scope and the size of its own implementation offerings. It remains to be seen if this trend will continue and Salesforce will grow into a strong position in the market for implementations, or if these capacities will be primarily used for strategic developments conducted jointly with clients.

Another trend worth mentioning is of Salesforce has signed several partnering agreements for joint implementations with other service providers. This move offers additional opportunities to these providers,

Salesforce made a strategic shift to **industry clouds**

but also runs the risk of growing dependence on Salesforce. However, it is not possible to conclusively assess how sustainable the expansion of Salesforce's own development capacities will be because, as a software business, it requires significant investments and usually has lower margins.

In addition to these strategic business initiatives, which ultimately do not generate any additional capacities in the market, many providers are focusing on reskilling and hiring qualified resources. This has become a critical success factor in the market for Salesforce implementation services. While some companies hire and train young talents to become Salesforce consultants through suitable qualification measures, others requalify experienced consultants from different areas to become Salesforce experts. Large system integrators follow this path due to the limited opportunities for additional growth by acquisitions. In its partnerships, Salesforce itself promotes companies that contribute significantly to additional implementation capacities.

Salesforce's recent verticalization strategy has significantly changed the current market environment. This trend had started a few years ago with the introduction of industry-specific products such as the Financial Services Cloud and the Health Cloud. A key indicator of the potential shift of focus to industry clouds was Salesforce's 2020 acquisition of Vlocity, which was an ISV of various industry-specific products based on the Salesforce platform. Following the acquisition, Vlocity's capabilities contributed to Salesforce's industry-specific products. Today, Salesforce offers several industry-specific clouds, all built on the Customer 360 platform, such as the Manufacturing Cloud, the Consumer Goods Cloud and the Media Cloud. It remains to be seen whether this move will be widely accepted by clients since it comes with additional licensing needs and related costs. Right now, it is too early to assess the success of this strategy shift.

Regarding the implementation methods used, the hybrid agile model remains the most common approach for globally operating customers. For these enterprises, integrating

Salesforce into a complex system landscape with global operations is a mandatory requirement. The hybrid agile model is a combination of agile elements for the implementation phases with phase-oriented elements related to strategy, design, and rollout. Most providers now offer this type of methodology in their portfolios. The pure agile methodology is still suitable for an isolated implementation of Salesforce; it is primarily used by midsized customers that do not require a global rollout and have limited integration requirements.

When it comes to integrating Salesforce with other applications, the MuleSoft platform continues to be the dominant tool. Comprehensive competence regarding this platform is now an essential requirement for providers to survive in the market. Large system integrators usually operate a dedicated MuleSoft practice of considerable size that bundles corresponding capacities.

An important factor that Salesforce clients sometimes underestimate is the high degree of standardization that goes along with the use of

a SaaS product like Salesforce. In many cases, clients learn that the standard functionalities and the available options to configure the solution do not cover their specific requirements. Since the SaaS platform cannot be subject to changes by the clients, there is a need for additional products that cover these requirements. There are many ISVs that offer additional solutions on the Salesforce platform. These solutions are typically offered as independent products, licensed separately and made available through a Salesforce-powered portal called the AppExchange Store. Salesforce ensures that the individual apps meet the basic software quality requirements, including for troubleshooting, maintenance cycles and compatibility with Salesforce products, among others.

Therefore, for all service providers, whether they are systems integrators or boutique vendors, a strong network of ISV partnerships within the Salesforce ecosystem remains of great importance. This applies not only to the implementation but also to the subsequent continuous support of ongoing operations.

In this year's study, the definition of most quadrants remained unchanged. Only the following two changes have been applied:

- The quadrant for Implementation Services for Analytics Solutions on Salesforce was replaced by the Implementation Services for Industry Clouds quadrant, recognizing the strategic shift of Salesforce mentioned above.
- The quadrant for Implementation Services for the Marketing Cloud Midmarket is renamed to Implementation Services for Marketing Automation Midmarket to better reflect the high degree of automation requirements that are in most cases characteristic to implementations in marketing.

The results by quadrant can be summarized as follows:

In the Multicloud Implementation and Integration for Large Enterprises segment, the support of global rollouts and the coverage of complex integration requirements are the key success factors for providers to achieve a leading position. Accenture, Capgemini, Cognizant, Customertimes, Deloitte Digital, HCLTech, IBM, Infosys, TCS and Wipro qualified as Leaders this year. As a Rising Star, LTIMindtree has the prospect of qualifying as a leading provider in the future.

In the Implementation Services for Core Clouds Midmarket segment, the early phases of development, including strategy development, design and planning of a roadmap have become increasingly important skills for providers' success in this area. Birlasoft, Coastal Cloud, Hexaware, Perficient, Persistent Systems and Silverline qualified as Leaders this year. As Rising Stars, Brillio and Coforge have the prospect of qualifying as leading providers if they continue to grow.

In the Implementation Services for Marketing Automation Midmarket segment, which was renamed and remains unchanged in terms of content, the following providers have qualified for a leading position this year: Coastal Cloud; Dentsu; Perficient; Persistent Systems; Silverline and Slalom.

In the comparatively young Implementation Services for Industry Clouds segment, expertise and availability of predefined solutions and accelerators are important success factors for service providers to achieve a leading position. The companies that qualified as Leaders this year are Accenture, Capgemini, Coastal Cloud, Cognizant, HCLTech, IBM, Infosys, Perficient, Persistent Systems, TCS, and Wipro. As Rising Stars, LTIMindtree and Tech Mahindra have the prospect of becoming Leaders in the future.

The market segment for Managed Application Services for Large Enterprises, like the corresponding segment for implementations, is largely dominated by large and global system integrators. Several other players occupy significant sub-areas, but Accenture, Capgemini, Cognizant, HCLTech, Infosys, LTIMindtree, TCS, Tech Mahindra and Wipro were able to qualify as Leaders in this space.

Although they have favorable cost structures due to their global supplier models, the large system integrators do not have a significant role in the Managed Application Services for Midmarket quadrant. This is mainly because the market has less complex requirements and the companies mentioned above do not prioritize this market. The companies that qualified as Leaders for this segment include Birlasoft, Brillio, Hexaware, Perficient, Persistent Systems and Silverline.

Here are some concluding general remarks about leading providers in this study:

- The leading providers analyzed in all quadrants closely collaborate with multiple stakeholders to ensure solutions are targeted at the continuously changing market needs.

Executive Summary

- Leading providers focus on using Salesforce as a platform for continuous innovation, broad integration across different applications, and end-to-end application lifecycle management.

- These providers combine technological innovation with domain and process expertise.

- Leading providers are willing to fund innovation, enter into co-development agreements and engage in outcome-based pricing models.

Continuous growth drives the demand for additional implementation capacities.

Provider Positioning

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Accenture	Leader	Not In	Not In	Leader	Not In	Leader
AllCloud	Not In	Product Challenger	Product Challenger	Not In	Contender	Market Challenger
Atos	Product Challenger	Not In	Not In	Product Challenger	Not In	Contender
Birlasoft	Not In	Leader	Not In	Not In	Leader	Contender
Brillio	Not In	Rising Star ★	Product Challenger	Not In	Leader	Not In
Capgemini	Leader	Not In	Not In	Leader	Not In	Product Challenger
CGI	Contender	Not In	Not In	Contender	Not In	Not In
Coastal Cloud	Not In	Leader	Leader	Not In	Not In	Leader
Coforge	Not In	Rising Star ★	Not In	Not In	Product Challenger	Product Challenger

Provider Positioning

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Cognizant	Leader	Not In	Not In	Leader	Not In	Leader
Customertimes	Leader	Not In	Not In	Product Challenger	Not In	Product Challenger
Deloitte Digital	Leader	Not In	Not In	Market Challenger	Not In	Leader
Dentsu	Not In	Not In	Leader	Not In	Not In	Not In
EPAM	Contender	Not In	Not In	Contender	Not In	Not In
Fujitsu	Contender	Not In	Not In	Contender	Not In	Not In
Grazitti Interactive	Not In	Product Challenger	Not In	Not In	Product Challenger	Contender
HCLTech	Leader	Not In	Not In	Leader	Not In	Leader
Hexaware	Not In	Leader	Product Challenger	Not In	Leader	Product Challenger

Provider Positioning

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

Provider Positioning

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
NTT DATA	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
OSF Digital	Product Challenger	Not In	Not In	Not In	Not In	Not In
Perficient	Not In	Leader	Leader	Not In	Leader	Leader
Persistent Systems	Not In	Leader	Leader	Not In	Leader	Leader
PwC	Market Challenger	Not In	Not In	Market Challenger	Not In	Market Challenger
Reply	Not In	Product Challenger	Product Challenger	Not In	Not In	Not In
Silverline	Not In	Leader	Leader	Not In	Leader	Product Challenger
Slalom	Product Challenger	Not In	Leader	Product Challenger	Not In	Not In
Tavant	Not In	Contender	Contender	Not In	Product Challenger	Not In

Provider Positioning

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

This study focuses on the important aspects for the **Salesforce Ecosystem in 2023**.

Simplified Illustration Source: ISG 2023

| Multicloud Implementation and Integration Services for Large Enterprises | Managed Application Services for Large Enterprises |

| Implementation Services for Core Clouds Midmarket | Managed Application Services for Midmarket |

| Implementation Services for Marketing Automation Midmarket | Implementation Services for Industry Clouds |

Definition

The ISG Provider Lens™ Salesforce Ecosystem Partners 2023 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S., U.K. France, Germany Brazil

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market (GTM) considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Scope of the Report

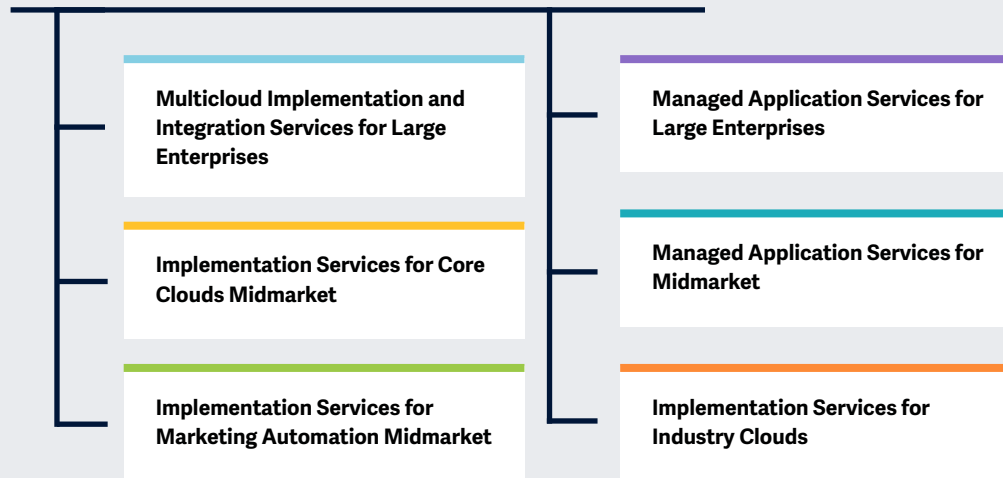In this ISG Provider Lens™ quadrant study, ISG covers the following six quadrants: Multicloud Implementation and Integration Services for Large Enterprises; Implementation Services for Core Clouds Midmarket; Implementation Services for Marketing Automation Midmarket; Implementation Services for Industry Clouds; Managed Application Services for Large Enterprises and Managed Application Services for Midmarket.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and GTM considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

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

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

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

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

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

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Multicloud Implementation and Integration Services for Large Enterprises

Multicloud Implementation and Integration Services for Large Enterprises

Who Should Read This Section

This report is relevant to large enterprises across all industries in the U.S. and evaluates Salesforce multicloud implementation and integration service providers. In this quadrant report, ISG defines the current market positioning of these providers in the U.S. and how they address the key challenges enterprises face in the country. Over the years, Salesforce has enhanced its product approach beyond customer relationship management (CRM) and its related applications, development, integration, and reporting.

Enterprises seek Salesforce solutions for the implementation and integration-related concerns where service providers offer comprehensive consulting, package evaluation, roadmap, implementation and systems integration on Salesforce and eco-system products like Sales Cloud, Service Cloud, Marketing Cloud, Einstein Analytics, MuleSoft, Tableau Enterprise CRM and CPQ.

Large enterprises are seeking digital transformation of their organizations. Service providers offer services that leverage industry and cloud consulting frameworks, industry-specific assets and accelerators, and tech-enabled methodology to deliver a holistic approach across strategy, design, implementation, change management and integration. ISG has observed that large enterprises usually operate their business in multiple regions and prefer providers that have strong integration capabilities and are operating on a global scale.

IT and technology leaders should read this report to understand providers' relative positioning and capabilities and how they can help effective adoption of services from Salesforce clouds, along with integration and analytics solutions. The report also explains how the technical capabilities of service providers are compared in the market.

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

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service providers that can help them effectively implement Salesforce Marketing Cloud, Salesforce Sales Cloud, Heroku and other offerings, with the necessary integration into related systems and analysis solutions.

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

ISG Provider Lens™

Source: ISG RESEARCH

Salesforce Ecosystem Partners
Multicloud Implementation and Integration Services for Large Enterprises
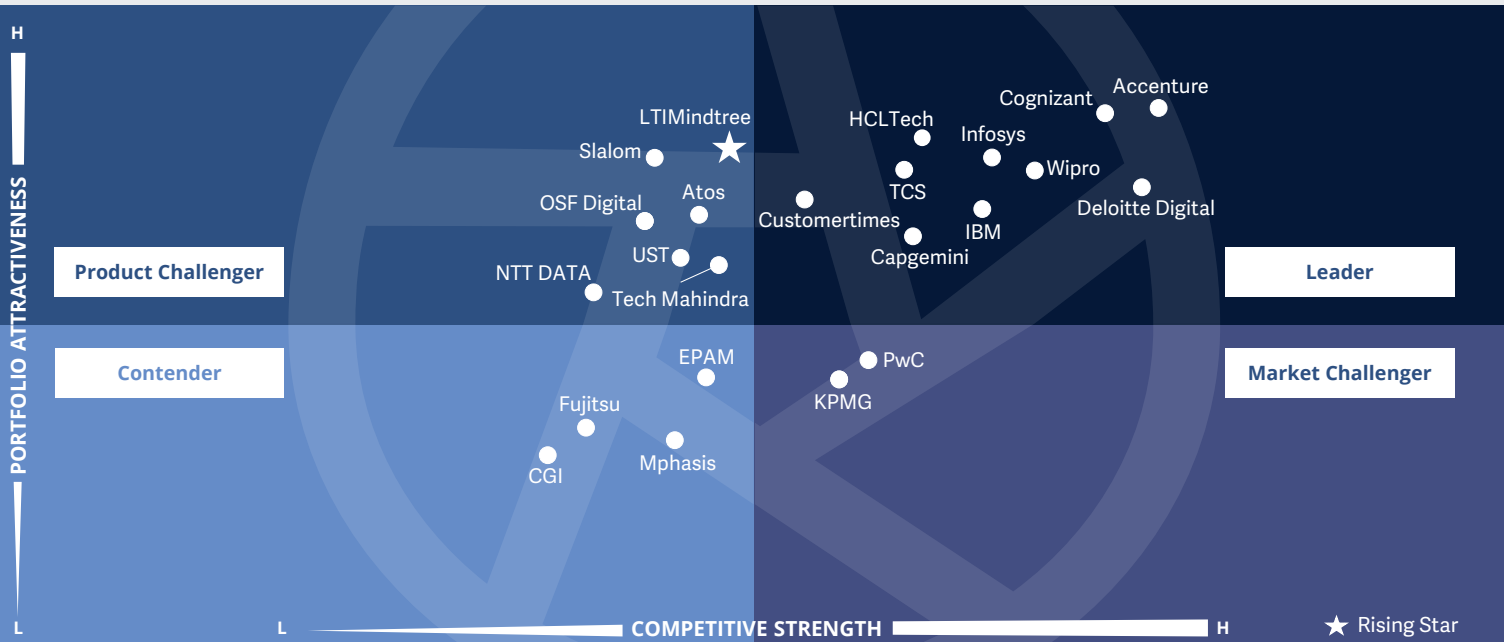
U.S. 2023

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

LTIMindtree

Slalom

OSF Digital   Atos

NTT DATA   UST

Tech Mahindra

EPAM

Fujitsu

CGI   Mphasis

HCLTech

Cognizant   Accenture

Infosys

TCS   Wipro

Customertimes   Deloitte Digital

IBM

Capgemini

Leader

PwC

KPMG

Market Challenger

L

L   **COMPETITIVE STRENGTH**   H   ★ Rising Star

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

Rainer Suletzki

Multicloud Implementation and Integration Services for Large Enterprises

Definition

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

Eligibility Criteria

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

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

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

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

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

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

Multicloud Implementation and Integration Services for Large Enterprises

Observations

The Salesforce implementation and integration services market has witnessed continued growth in recent years. Meanwhile, the availability of qualified resources with Salesforce expertise remains a limiting factor for the number of implementations. This has caused consolidation pressure in the market for corresponding services, with the leading system integrators trying to expand their resource base by taking over midsized providers with a strong portfolio and notable resource base. Although this does not generate additional capacities, this process is likely to continue. In many cases, providers focus on multicloud implementations, combined with using Salesforce as an enterprise platform for innovation.

From more than 90 companies assessed for this study, 23 have qualified for this quadrant with 10 being Leaders and one being a Rising Star:

accenture

Accenture exhibits impressive scale and offers a comprehensive library of predefined solutions. Integration requirements are well covered by its comprehensive MuleSoft capabilities. The company operates a powerful global delivery model and exhibits continuous growth in North America.

Capgemini

Capgemini has a strong workforce and operates a global delivery model, which is a strong asset for transformations based on Salesforce. Powerful, predefined solutions prove its deep domain expertise in various industries. Capgemini has strong capabilities for the integration within sophisticated application landscapes.

cognizant

Cognizant has demonstrated significant growth in the Salesforce implementation services market as compared to its peers. Its portfolio includes a complete library of best practices, core processes and underlying technologies for each function within the client organization.

Customertimes

Strong focus on achieving business value is a key characteristic in the implementations conducted by **Customertimes**. The provider has deep domain expertise in six key industries and has the unique capability to provide full mobile solutions covering all Salesforce objects, including full offline capability.

Deloitte Digital

Deloitte Digital has organized its Salesforce portfolio around integrating and aligning business processes with technology. Deloitte Digital runs a dedicated organizational unit that develops predefined solutions across multiple industries. In its transformation projects, Deloitte reckons human-experience aspects for application users.

HCLTech

HCLTech offers comprehensive migration solutions for various client situations. The company has made significant investments in its Salesforce-related workforce and offers a comprehensive suite of accelerators and productivity tools. HCLTech maintains a large partner network with leading technology providers to offer competent solutions in the context of Salesforce applications.

IBM

The **IBM** portfolio includes many functional accelerators that support fast and efficient implementation of Salesforce-based applications. The company exhibits a true global presence with significant numbers of Salesforce consultants in several countries. IBM is a global strategic partner of Salesforce with notable presence in various Partner Advisory Boards.

Multicloud Implementation and Integration Services for Large Enterprises

Infosys has a strong record on legacy to Salesforce migration, helping clients achieve application rationalization alongside modernization of various platforms. The company covers a wide range of functionalities with its large solution repository and operates a large MuleSoft practice that offers powerful integration capabilities.

TCS offers a range of substantial modular solutions and drives the development of innovations based on Salesforce, in cooperation with clients. It has built significant capabilities that facilitate innovations together with its clients.

Wipro has shown significant growth in scope and scale over the recent years, with a specific focus on strengthening its capabilities for onshore delivery. With a strong portfolio comprising solutions for different verticals, Wipro undertakes a transformation approach that includes data engineering and data lifecycle management methodologies.

LTIMindtree

Following the merger of the previous L&T companies LTI and Mindtree, the combined Salesforce practice of **LTIMindtree** has garnered remarkable capabilities in scope and scale, making it a Rising Star. Its portfolio includes numerous function-specific and industry-specific accelerators that support efficient project execution.

Leader

"HCLTech is an excellent Salesforce implementation partner with remarkable growth in the U.S."

Rainer Suletzki

HCLTech

Overview

HCLTech is a technology company that offers software, IT infrastructure and business process outsourcing (BPO) services worldwide. The company also offers hybrid clouds, digital workplace, and cloud native services, together with service integration and management. HCLTech is headquartered in Noida, India, and operates in 60 countries. It has over 222,270 employees across 215 global offices. In FY22, the company generated $12.3 billion in revenue.

Strengths

Predefined solutions for migration and consolidation: HCLTech offers comprehensive migration solutions for various client situations, such as migration from legacy CRM systems to Salesforce. It also provides companies with a dedicated instance consolidation service, where several Salesforce instances are established independently of one another, leading to a scattered system structure.

Remarkable growth: HCLTech is undergoing remarkable growth in its number of clients, its workforce and the respective revenue. Furthermore, HCLTech has significantly invested in pursuing Salesforce certifications. It seeks to achieve Expert level status in all core clouds and most industry clouds.

Large partner network: HCLTech maintains several partnerships with technology providers that offer solutions related to Salesforce applications. As an orchestrating partner, HCLTech can bundle various solutions into a comprehensive package and ensure their integration for its clients.

Caution

HCLTech should further strengthen Salesforce analytics solutions based on Salesforce. This could be achieved by offering standardized predefined reporting solutions that address common client situations.

Based on its powerful solutions for data management, HCLTech should expand its portfolio by consultancy offerings that support clients in developing data-oriented architecture models across functional areas.

Implementation Services for
Core Clouds Midmarket

Who Should Read This Section

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

In this quadrant report, ISG defines the current market positioning of providers of Salesforce implementation services for core clouds in the U.S. and how they address the key challenges enterprises face in the country. The report assesses providers specializing in Salesforce Sales Cloud, Service Cloud and Commerce Cloud offerings. These providers adopt an agile approach for implementation, helping clients redesign processes and enabling them with Salesforce applications.

Cloud-based solutions with seamless integration capabilities for third-party applications have been the top priority for enterprises seeking Salesforce core cloud implementation services. Unlike large enterprises, small and midsize companies seek Salesforce implementation services for core clouds to help them with projects that do not have significant integration needs.

These companies are less complex when it comes to digital transformation, and often operate in one region only. Hence, deployment is faster, with easy-to-use services and cost-saving advantages.

In the U.S., enterprises seek a specialized service provider that can wrap up the task in less than 50 percent of the time compared to other competitors without disrupting ongoing projects. Service providers are upgrading their services through investment and acquisitions and are also developing platforms to offer Salesforce-related services and post-sales services.

IT and technology leaders should read this report to understand providers' relative positioning and capabilities and how they can help effective adoption of services from Salesforce clouds, along with integration and analytics solutions. The report also explains how the technical capabilities of service providers are compared in the market.

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

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service providers that can help them effectively implement Salesforce Marketing Cloud, Salesforce Sales Cloud, Heroku and other offerings, with the necessary integration into related systems and analysis solutions.

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

ISG Provider Lens™

Source: ISG RESEARCH

Salesforce Ecosystem Partners
Implementation Services for Core Clouds Midmarket

U.S. 2023

PORTFOLIO ATTRACTIVENESS (H / L)

Coforge

Marlabs
Perficient
Coastal Cloud
Silverline

Reply   AllCloud   Brillio
Mastek   Hexaware   Persistent Systems
Zennify
Birlasoft
Grazitti Interactive
Jade Global
Valtech

Product Challenger

Leader

Contender

Visionet   Tavant
Huron

Market Challenger

Zensar Technologies

COMPETITIVE STRENGTH (L / H)

★ Rising Star

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

Rainer Suletzki

Implementation Services for Core Clouds Midmarket

Definition

This quadrant addresses providers that specialize primarily in Salesforce Sales Cloud, Service Cloud, Commerce Cloud and Community Cloud. These products are broadly considered as the core clouds of Salesforce. These providers mostly take an agile approach for implementation and focus on cases where less integration is required, which is typical for midsize and smaller clients. So, in many cases the projects are conducted within a few months. An important aspect of the required services revolves around consulting on the redesign of processes while using Salesforce applications. From the functional perspective, the implementation services include process consulting, design, configuration, data cleansing and migration and finally the go-live support.

Eligibility Criteria

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

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

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

4. Unique **differentiators**

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

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

Observations

The continuous consolidation in the market for Salesforce implementations has been induced by the remarkable growth and has changed the provider landscape over time. The acquisition of several midsized providers by large system integrators opened additional opportunities for other providers to fill the respective capacity gaps. The focus of implementations in the midmarket segment continues to be on agile methods and includes several cloud products, while the integration requirements are usually less complex than for large enterprises. Many of the large system integrators, which usually focus on large enterprises, are also active in this segment. The assessment focuses on the midsized providers which have their sweet spot in this segment.

From more than 90 companies assessed for this study, 19 have qualified for this quadrant with six being Leaders and two being Rising Stars:

Birlasoft

Birlasoft's methodology for Salesforce implementations covers the entire preparation and decision process. The company can facilitate the integration of Salesforce with respective backend systems, usually based on the MuleSoft platform. Its portfolio includes several powerful proprietary Salesforce accelerators.

Coastal Cloud

Coastal Cloud has a strong focus on the business value of a Salesforce transformation. Coastal Cloud provides its implementation services alongside a cross-cloud skilled implementation and services team. Coastal Cloud specializes in addressing sophisticated integration needs in projects with its MuleSoft capabilities.

Hi. HEXAWARE

Hexaware offers a dedicated framework for the early phases of a transformation project. It also offers industry-specific solutions. Hexaware's portfolio exhibits extensive use of the Lightning platform to be mobile ready across all relevant functionalities.

Perficient

Perficient offers a compelling methodology for the early phases of a transformation. The company primarily applies agile methods for implementing the Salesforce Core Clouds, with heavy attention to achieving the highest customer experience. Perficient operates a global delivery model with domestic, nearshore, and offshore locations.

Persistent Systems

Persistent Systems uses a strong data-oriented implementation approach that targets using Salesforce as an enterprise platform for digital transformation. Persistent Systems is growing at a rate beyond the market average and is effectively meeting the requirements of its large enterprise clients.

SILVERLINE

Silverline has deep expertise in various industries and maintains a strong partnership with Salesforce that includes cooperation in implementations for selected customers. The provider has a strong focus on data management to improve the quality of the implementation.

Brillio

Brillio (Rising Star) provides powerful tool support for implementing and optimizing Salesforce instances and has deep expertise in several key industries. The company offers a range of reusable Lightning web components with high reusability. Mobile enablement is also a key capability of Brillio's portfolio.

Coforge

Coforge (Rising Star) follows a clear strategy for significant growth in scale and scope in the market for Salesforce implementations. The company focuses on a senior mix of talent in its workforce. Coforge achieves compelling results in its project by putting high efforts into the strategy and design phases.

Implementation Services for
Marketing Automation Midmarket

Implementation Services for Marketing Automation Midmarket

Who Should Read This Section

This report is relevant to small and midsize companies across all industries in the U.S. and evaluates Salesforce implementation service providers for Marketing Automation.

In this quadrant report, ISG defines the current market positioning of Salesforce implementation services providers for Marketing Automation in the U.S. and how they address key challenges enterprises face in the country. These providers focus on helping clients deliver direct, personalized customer engagement and increase revenue through one-on-one communication at scale and across multiple channels. Direct customer interaction implies high data volumes, and therefore automation is very important. ISG observes that companies seeking Salesforce implementation services typically do not have complex real-time integration needs.

In the U.S. market, small and midsize companies are seeking Salesforce service providers with marketing services and marketing mandates, including revenue generation and customer acquisition and retention. Service providers are enriching their portfolios by upgrading their marketing automation offerings through portfolio expansion and upgrading outlook. Quality and consistency have been identified as the most preferred asks for enterprises. In response, service providers invest heavily in training and developing their employees in Salesforce services and certifications to deliver quality services with a quick turnaround time. In the U.S. market, enterprises seek human-centered marketing based on individual needs and alignment with the customer journey, which is experiencing high growth in this segment.

IT and technology leaders should read this report to understand providers' relative positioning and capabilities and how they can help effective adoption of services from Salesforce clouds, along with integration and analytics solutions. The report also explains how the technical capabilities of service providers are compared in the market.

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

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service providers that can help them effectively implement Salesforce Marketing Cloud, Salesforce Sales Cloud, Heroku and other offerings, with the necessary integration into related systems and analysis solutions.

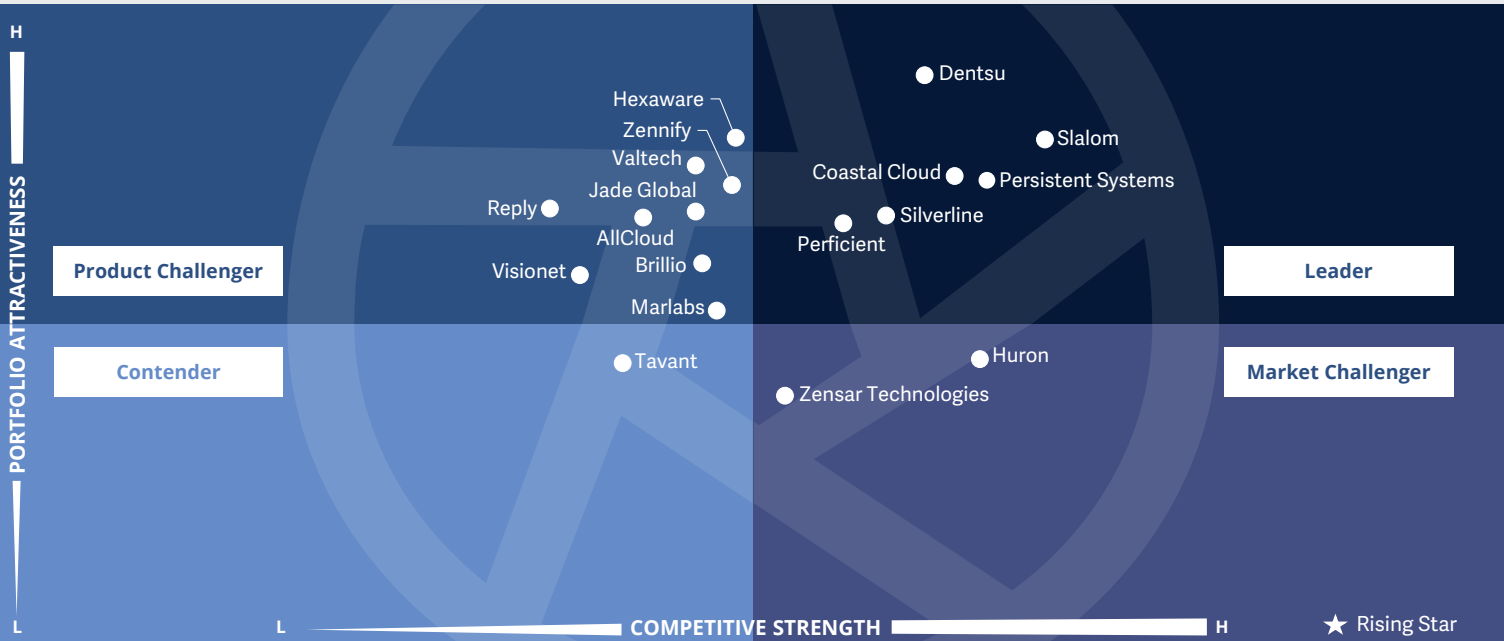**Field service managers** should read this report to understand how service providers can help implement and expand the use of Salesforce Service Cloud to manage field service operations better.

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

Rainer Suletzki

Implementation Services for Marketing Automation Midmarket

Definition

This quadrant addresses providers that specialize in Salesforce Marketing Cloud for cases where the need for real-time integration into a complex system landscape is limited, which is more typical for medium and small-sized clients. In addition, provider expertise in marketing specific aspects such as the use of media and multichannel approaches is essential. As the interaction with the end clients usually implies a large volume of transactions, the ability to automate these functionalities – for instance by using the Pardot product – is another important success factor in this quadrant. From the functional perspective, the implementation services include process consulting, design, configuration, data cleansing and migration and finally the go-live support.

Eligibility Criteria

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

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

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

4. Unique **differentiators**

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

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

Observations

The implementation services for the Salesforce Marketing Automation must consider that most marketing activities include direct interactions with end consumers of products and services. This results in large data volumes and increased demand for fully mobile-enabled solutions. Hence, enabling this is an essential capability which the leading providers need to exhibit in this quadrant. Their automation capabilities with the Pardot platform are also an important success factor for this kind of implementation.

With their strong domain expertise some of the large marketing agencies can also act as important competitors for the technology-oriented providers in this market. In general, not all the service providers that are active in the market for Salesforce implementations maintain a large marketing practice. Their certifications for the respective Salesforce products, the Marketing Cloud and Pardot, exhibit some room for future improvement.

From over 90 companies assessed for this study, 18 have qualified for this quadrant with six being Leaders:

Coastal Cloud

Coastal Cloud has a significant practice for the Salesforce Marketing Cloud and related products. The company offers a predefined solution that is easy to implement and enables a high level of automation for standard marketing tasks. The operating model ensures high customer proximity.

Dentsu

Dentsu offers a full range of services for the Marketing Cloud, comprising strategy, consulting, configuration, and custom development, based on a deep understanding of the marketing function. Dentsu orients its services around comprehensive CRM implementation and focuses strongly on customer experience marketing.

Perficient

The **Perficient** portfolio includes several predefined solutions for the marketing environment. The provider pays high attention to achieve a compelling user experience. Perficient has a significant share of consultants that hold certifications in Marketing Cloud and Pardot.

The large Marketing Cloud practice of **Persistent Systems** offers several predefined solutions for marketing functions. The company is focused on automation and marketing-related customer analytics, and offers various productivity solutions supporting the customer analytics functions concerning the Marketing Cloud.

Silverline offers predefined packages to key industries for the staggered implementation of Salesforce. Using powerful automation mechanisms is a key element in Silverline's portfolio. Operating primarily with onshore resources, Silverline has a strong market presence across the U.S., with close proximity to client organizations.

Slalom

Slalom has deep expertise in concept-to-commercialization, customer experience and omnichannel commerce. The company also offers industry-specific solutions. With its Build-as-a-Service approach, Slalom offers an innovative way of crafting custom-built technology products.

Managed Application Services for Large Enterprises

Managed Application Services for Large Enterprises

Who Should Read This Section

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

In this quadrant report, ISG defines the current market positioning of Salesforce managed application service providers for large enterprises in the U.S. Traditional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring. This study covers providers offering additional services, including administrative assistance, accelerators for development and utilization, development services, proactive monitoring and advisory services. To skillfully manage their Salesforce environments, enterprise clients seek service providers that can keep IT costs under control and efficiently maintain the platforms.

Enterprises need service providers to manage applications, licenses and upgrades, and provide user support and develop business applications integrated with Salesforce environment.

In the U.S. market, large enterprises are seeking end-to-end operational support services for Salesforce core and eco-system products, creation of a success plan (improving user productivity), continuous improvement with best practices, service operations, monitoring and significant enhancements for worldwide locations, for which global service providers are most preferred.

IT and technology leaders should read this report to understand providers' relative positioning and capabilities and how they can help effective adoption of services from Salesforce clouds, along with integration and analytics solutions. The report also explains how the technical capabilities of service providers are compared in the market.

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

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service providers that can help them effectively implement Salesforce Marketing Cloud, Salesforce Sales Cloud, Heroku and other offerings, with the necessary integration into related systems and analysis solutions.
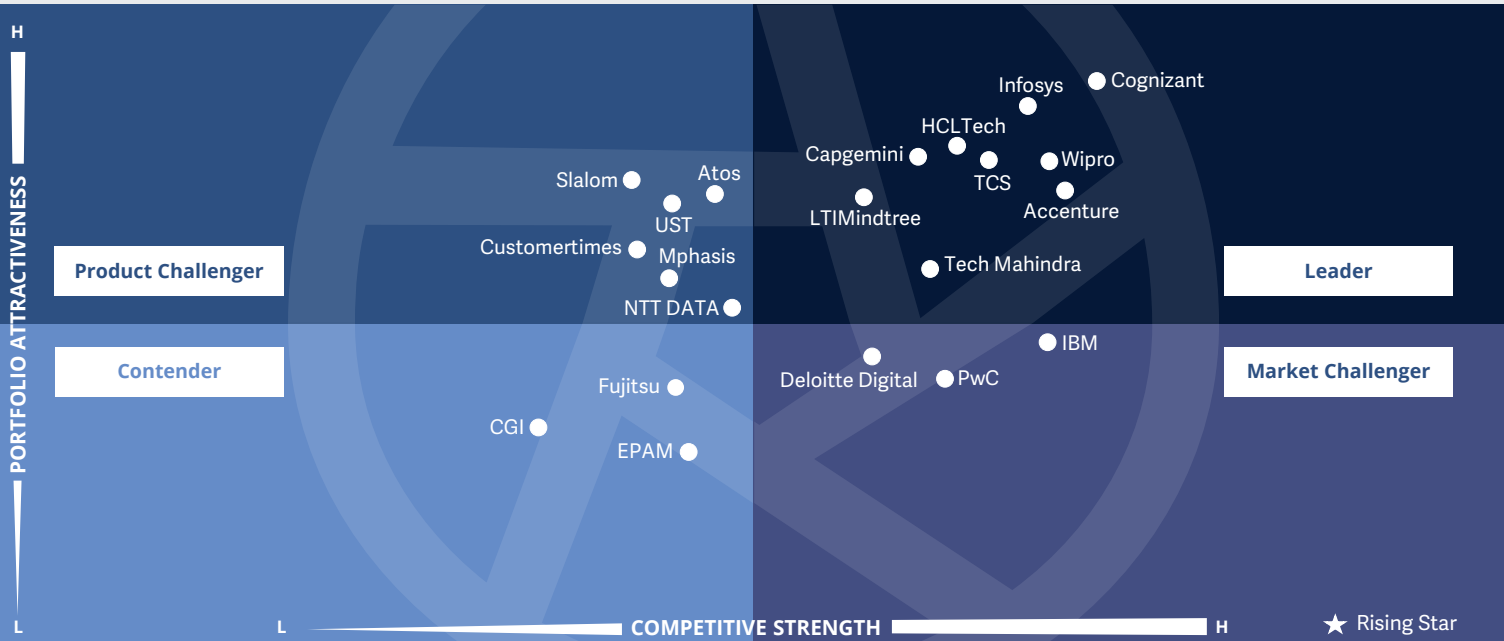
Field service managers should read this report to understand how service providers can help implement and expand the use of Salesforce Service Cloud to manage field service operations better.

ISG Provider Lens™

Source: ISG RESEARCH

Salesforce Ecosystem Partners
Managed Application Services for Large Enterprises

U.S. 2023

PORTFOLIO ATTRACTIVENESS (vertical axis, L to H)

COMPETITIVE STRENGTH (horizontal axis, L to H)

Quadrant labels:
- Product Challenger
- Contender
- Leader
- Market Challenger

Providers plotted:
- Slalom
- Atos
- UST
- Customertimes
- Mphasis
- NTT DATA
- Capgemini
- HCLTech
- Infosys
- Cognizant
- Wipro
- TCS
- Accenture
- LTIMindtree
- Tech Mahindra
- IBM
- Deloitte Digital
- PwC
- Fujitsu
- CGI
- EPAM

★ Rising Star

This quadrant assesses the capability of providers to offer **managed services** for Salesforce applications focused on **large enterprise clients** with global reach and **complex application landscapes**.

Rainer Suletzki

Managed Application Services for Large Enterprises

Definition

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

Eligibility Criteria

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

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

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

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

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

Observations

Similar to the implementation services for large enterprises, the coverage of integration requirements within sophisticated application landscapes also strengthens the position of managed application service providers. Consequently, large system integrators dominate this market as they specialize in providing support for end-to-end processes across software packages. The end-to-end capabilities also need to include the various products of ISVs that are broadly used by large enterprises for functionalities that are not covered by the standard Salesforce. Large enterprises, which previously primarily focused on cost efficiency, now demand optimization of underlying business processes. This can help clients to achieve additional value beyond the technology-driven aspects.

From more than 90 companies assessed for this study, 21 have qualified for this quadrant with nine being Leaders:

accenture

Accenture exhibits a strong delivery model for large enterprise clients, combined with deep functional knowledge and comprehensive technological expertise. Its expertise in all major application software packages enables it to offer end-to-end application services covering all aspects of sophisticated application landscapes.

Capgemini

Capgemini offers a powerful model for support, maintenance, and development of applications, including Salesforce. With the coverage of most common software packages, the managed application services provided by Capgemini cover end-to-end processes across various application platforms.

cognizant

Cognizant´s portfolio includes a variety of powerful tools specifically designed to support Salesforce applications. It is focused on automating the respective activities to achieve highly cost-efficient operation. Cognizant supports its clients' business functions by measuring the user adoption of Salesforce functions.

HCLTech

HCLTech offers application management services along with a proprietary framework, covering smart application support and maintenance operations. With a comprehensive and well-structured product and service catalog, HCLTech runs a global delivery model capable of offering cost-efficient application services.

Infosys

Infosys' portfolio includes a variety of tools for supporting efficient application management. The provider's managed application services stand out for using automation capabilities to achieve good business process stability and excellent cost-effectiveness.

LTIMindtree

LTIMindtree's application management portfolio has a clear focus on sophisticated system landscapes. The company offers several powerful tools specifically designed for the Salesforce environment. It has a dedicated tool for master data management (MDM) to ensure data and process quality.

TCS TATA CONSULTANCY SERVICES

In its engagements, **TCS** continues to seek service optimization and efficiency improvement. Its Salesforce practice has witnessed significant organic growth in recent years. Its approach ensures a consistent delivery structure over time.

Managed Application Services for Large Enterprises

Tech Mahindra's service support model for Salesforce is chiefly driven by automation and highly standardized procedures to achieve significant productivity gains and operational stability. It offers support and maintenance with very flexible pricing models.

Wipro's delivery model allows for close customer proximity and cost-effectiveness. The company uses various tools to increase application management efficiency and support automated deployments. Wipro offers a modular governance model to create a comprehensive solution for managing application operations in cooperation with customers.

Leader

"HCL offers a compelling portfolio of managed services for operating Salesforce-based solutions."

Rainer Suletzki

HCLTech

Overview

HCLTech is a technology company that offers software, IT infrastructure and business process outsourcing (BPO) services worldwide. The company also offers hybrid clouds, digital workplace and cloud native services, together with service integration and management. Headquartered in Noida, India, it operates in 60 countries and has more than 222,270 employees across 215 global offices. In FY22, the company generated $12.3 billion in revenue.

Strengths

Powerful application management platform: HCLTech offers application management services along with its proprietary ASM 2.0 framework, which offers smart application support and maintenance operations. ASM 2.0 enables the delivery of cost-effective, efficient services with focus on business value and user experience.

Well-structured product and service catalog: HCLTech presents its services in a comprehensive and well-structured product and service catalog. This helps clients to select the services that are appropriate for the respective client situation.

Focus on data quality: HCLTech has developed a specific cloud-based master data management solution that supports integration within sophisticated system landscapes and continuous management of data quality.

Mature delivery model: HCLTech runs a global delivery model with a high share of offshore resources and can offer a cost-efficient application service. The company uses outcome-based price models to deliver services, which indicates HCL's willingness to take risk and responsibility in client engagements.

Caution

In most cases, HCL applies a continuous support and build model where post-deployment support and project work are executed in an interrelated way. The company should offer an alternative model for clients where a stricter separation between build and support is required, for instance, in life sciences. HCLTech should also highlight its capabilities to maintain data and process quality in its portfolio.

Managed Application Services for Midmarket

Managed Application Services for Midmarket

Who Should Read This Section

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

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

In the U.S. market, small and midsize customers have shown high demand for automation and structured transition models. Service providers support enterprise clients through cost management solutions for Salesforce applications, planning upgrades, conducting regular training and expanding the use of Salesforce within an organization.

Small and midsize customers prefer referrals to get client-centric service providers, where service providers are making a heavy investment toward customer satisfaction, client retention and building long-term relationships with existing clients. All service providers are aiming for strong user satisfaction to sustain or encourage the use of Salesforce applications and justify the investments in Salesforce managed services.

IT and technology leaders should read this report to understand providers' relative positioning and capabilities and how they can help effective adoption of services from Salesforce clouds, along with integration and analytics solutions. The report also explains how the technical capabilities of service providers are compared in the market.

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

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service providers that can help them effectively implement Salesforce Marketing Cloud, Salesforce Sales Cloud, Heroku and other offerings, with the necessary integration into related systems and analysis solutions.
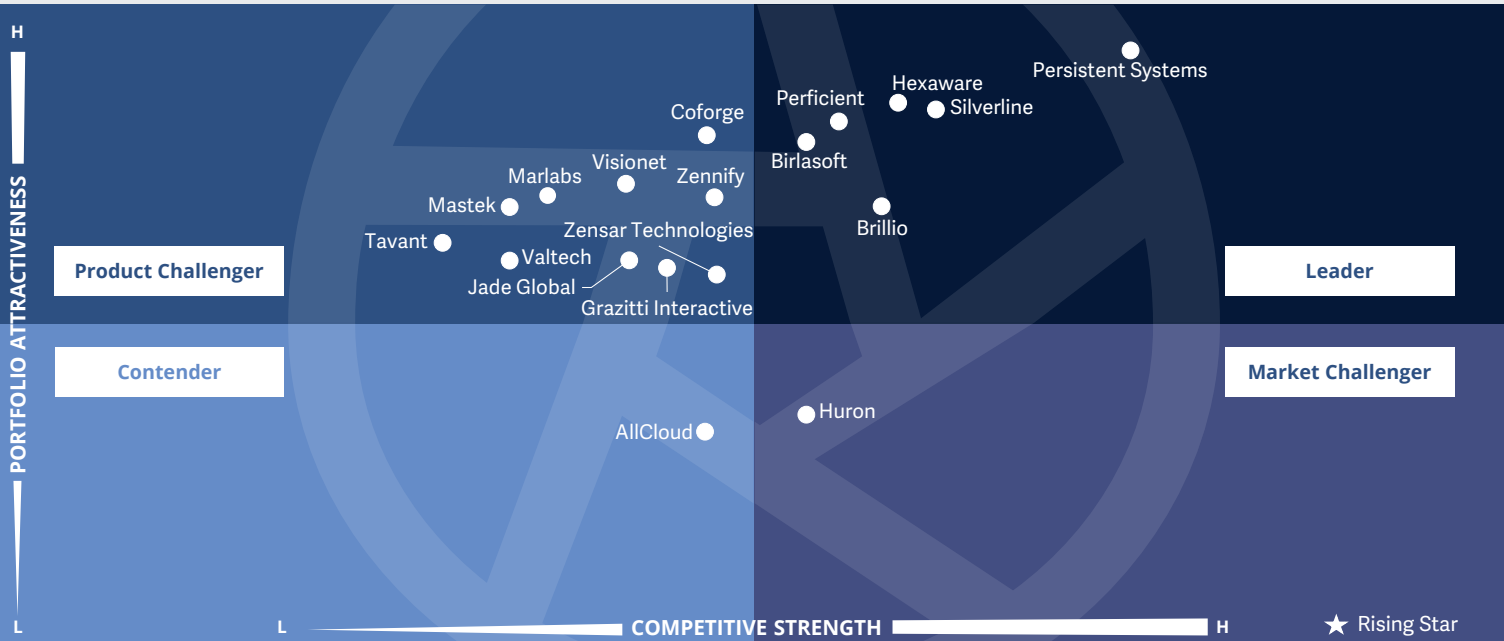
Field service managers should read this report to understand how service providers can help implement and expand the use of Salesforce Service Cloud to manage field service operations better.

ISG Provider Lens™

Source: ISG RESEARCH

Salesforce Ecosystem Partners
Managed Application Services for Midmarket

U.S. 2023

PORTFOLIO ATTRACTIVENESS

COMPETITIVE STRENGTH

H

L

L — H

Product Challenger

Contender

Leader

Market Challenger

Coforge
Perficient
Hexaware
Persistent Systems
Silverline
Birlasoft
Visionet
Marlabs
Zennify
Mastek
Brillio
Tavant
Zensar Technologies
Valtech
Jade Global
Grazitti Interactive
AllCloud
Huron

★ Rising Star

This quadrant assesses the capability of providers to offer **managed services for Salesforce applications**, mainly for **midmarket clients**, which, in many cases, have a more regional focus.

Rainer Suletzki

Managed Application Services for Midmarket

Definition

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

Eligibility Criteria

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

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

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

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

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

Observations

From a functional perspective, the managed application services focused on SaaS products like Salesforce are less complex than for traditional on-premises products, since a large part of the application management is conducted by the software vendor Salesforce itself. While Salesforce covers all platform-related aspects such as database management or performance management, service providers offer upgrade support, data volume and license management, user training and, where needed, management of various interfaces. Due to this limited scope, some of the midmarket providers offer implementation services and do not prioritize the managed application services business. Compared to the large enterprise segment, the requirements for end-to-end processes across platforms are slightly less important for midsize clients, since in many cases their application landscapes are less sophisticated.

From more than 90 companies assessed for this study, 18 have qualified for this quadrant with six being Leaders:

Birlasoft

Birlasoft offers the entire spectrum of application support for Salesforce, where the focus on preventive and predictive maintenance of applications supports continuous improvement in system quality and availability. Birlasoft runs a sophisticated governance model in cooperation with the client for effective system operation and maintenance.

Brillio

Brillio adopts a detailed model to offer managed application services covering dimensions improvement, operation and automation, and outcome definition. In the ongoing engagement, the company applies a set of predefined metrics to closely monitor and report the service performance to its clients.

HEXAWARE

Hexaware provides an outcome-based AMS offering for Salesforce, which also manages continuous integration and continuous development. It uses a proprietary platform to drive ITSM optimization and automation and monitors the quality of an application with its health assessment and sophisticated data quality management.

Perficient

Perficient employs a dedicated team to deliver its application services. The scope covers the entire spectrum of application services. In its engagements, Perficient focuses on all aspects around organizational readiness for client enterprises.

Persistent

Persistent Systems' managed application service offering covers all relevant components and provides clients with multiple options for configuration in a dedicated model or in a shared resource model. Persistent Systems focuses on implementing automation solutions to significantly reduce the personnel-related service components.

SILVERLINE

Silverline's portfolio offers a comprehensive governance framework for managed services. The company provides predefined packages for application services, allowing clients to select scope, resource allocation, service levels and standardized definitions. The service elements cover the entire scope of application management.

Implementation Services for Industry Clouds

Implementation Services for Industry Clouds

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. evaluating service providers that offer implementation services for the industry cloud. In this quadrant report, ISG defines the current market positions of the service providers in the U.S. and identifies how the key challenges associated with implementing industry cloud for Salesforce products are being addressed in the country.

This quadrant includes providers of implementation services that are focused on industry cloud products of Salesforce, such as Financial Services Cloud and Health Cloud. Industry-specific skills and appropriate accelerators are important success factors for this segment. Service providers also need the capability to develop comprehensive solutions based on the various Salesforce products that are relevant to a particular client situation. With Salesforce currently moving its offerings toward higher verticalization, this topic will become a high priority in future implementations.

From a functional perspective, the implementation services include process consulting, design, configuration, data clean-up, migration, and finally, go-live support.

In the U.S. market, service providers are making investments to increase the industry's cloud competencies, and they are offerings services like advisory, consulting, implementation, application support, transformation for Health Cloud, Nonprofit cloud, Financial Services cloud and Manufacturing Cloud.

In the U.S., banking, financial services, insurance, travel, hospitality and healthcare have been marked as emerging industries.

IT and technology leaders should read this report to understand providers' relative positioning and capabilities and how they can help effective adoption of services from Salesforce clouds, along with integration and analytics solutions. The report also explains how the technical capabilities of service providers are compared in the market.

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

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service providers that can help them effectively implement Salesforce Marketing Cloud, Salesforce Sales Cloud, Heroku and other offerings, with the necessary integration into related systems and analysis solutions.
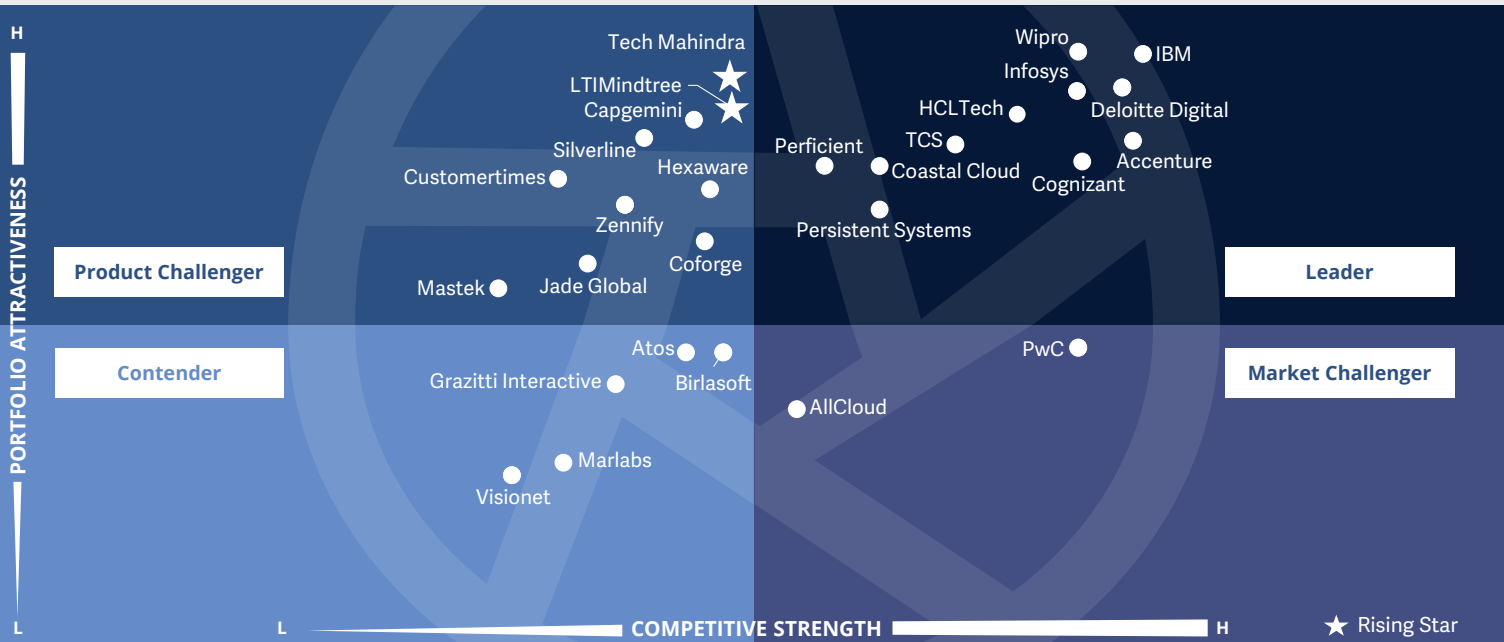
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ISG Provider Lens™

Source: ISG RESEARCH

Salesforce Ecosystem Partners
Implementation Services for Industry Clouds

U.S. 2023

H

PORTFOLIO ATTRACTIVENESS

Tech Mahindra

LTIMindtree
Capgemini

Silverline
Customertimes
Hexaware

Zennify

Mastek   Jade Global   Coforge

Product Challenger

Contender

Atos
Grazitti Interactive   Birlasoft

Marlabs
Visionet

AllCloud

Wipro   IBM
Infosys
HCLTech   Deloitte Digital
Perficient   TCS
Coastal Cloud   Accenture
Cognizant

Persistent Systems

PwC

Leader

Market Challenger

L

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant addresses providers for implementation services that are focused on the **Industry Cloud products of Salesforce**. Industry specific **skills and appropriate accelerators** are important success factors for this segment.

Rainer Suletzki

Implementation Services for Industry Clouds

Definition

This quadrant addresses providers for implementation services that are focused on the industry cloud products of Salesforce, for instance Financial Services Cloud or Health Cloud. Industry-specific skills and appropriate accelerators are important success factors for this segment. Furthermore, service providers need the capability to develop comprehensive solutions based upon the various Salesforce products that are relevant in the particular client situation. As Salesforce is currently moving its offerings toward higher verticalization, this topic will gain high priority in future implementations. From the functional perspective the implementation services include process consulting, design, configuration, data cleansing and migration and finally the go-live support.

Eligibility Criteria

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

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

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

4. Unique **differentiators**, e. g. proven industry-specific accelerators

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

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

Observations

The market for Salesforce implementations is currently experiencing a significant change following Salesforce's launch of its verticalization strategy. This started a few years ago when industry-specific products like the Financial Services Cloud and the Health Cloud were introduced. After the acquisition of Vlocity the respective capabilities became the core of an accelerated move of Salesforce to more industry-specific products. Today, Salesforce has several industry-specific clouds, all built on the Customer 360 platform. It is obvious that this market is rather young, and there are not many clients that have started a strong push toward this new approach. It remains to be seen whether this move will be widely accepted by clients since this change comes with additional license needs and the related costs. Nevertheless, for service providers it is now essential to invest significantly in their industry expertise and the respective products offered by Salesforce. In transformation projects it is necessary to conduct a thorough assessment which product are most suitable for the respective client situation.

From over 90 companies assessed for this study, 28 have qualified for this quadrant with 11 being Leaders and two being Rising Stars:

accenture

Due to its long-term experience with industry-specific solutions, **Accenture** has an outstanding position to support the strategic shift of Salesforce to industry clouds. Its industry-wide expertise on business processes enables Accenture to transform the respective requirements to technical implementation.

Coastal Cloud

Coastal Cloud has compelling capabilities in most of the industry clouds. The provider pays considerable attention to data migration and additional measures for safeguarding data quality in its implementation projects. Coastal Cloud is well prepared for the expected continuous market growth for Salesforce industry clouds.

cognizant

Cognizant offers a rich portfolio of industry-specific solutions based on Salesforce. The company complements the industry-specific solutions by developing functional solutions for common areas across industries. Cognizant maintains a close partnership with Salesforce, including close cooperation in product development.

Deloitte Digital

Deloitte Digital's Salesforce-related portfolio comprises several powerful solutions for various industries. The provider can develop and implement compelling solutions in an agile and flexible way. Deloitte Digital is a strategic partner of Salesforce and has achieved many Salesforce certifications.

HCLTech

HCLTech offers implementation expertise and predefined solutions for multiple industries. HCL offers project work and post-deployment support in an interrelated way, which enables it to provide agile and scalable services.

IBM

IBM has a strong record with its deep expertise in numerous industries. It has a strong technology portfolio that enables the company to combine Salesforce-related offerings with complementary cloud and advanced AI technologies. IBM invests heavily in new capabilities to expand and empower clients' innovation roadmaps.

Infosys

Infosys has Salesforce deployment experience across industry verticals and has additional expertise with numerous ISV solution offerings that are based on the Salesforce platform. Infosys achieved strong growth in Salesforce-related market segments in recent years.

Perficient

Perficient has already built significant capabilities for the new Salesforce industry clouds and is well prepared for strategic shift of. Perficient operates a large MuleSoft practice, enabling the company to cover the clients' integration needs, for instance with backend systems or front desk functionalities.

Implementation Services for Industry Clouds

Persistent Systems follows an industry-focused delivery structure. The provider offers accelerators that are usable across industries for improving service delivery and project efficiency. Persistent Systems has been Salesforce's product development partner, enabling it to develop sophisticated and customizable solutions based on the Salesforce platform.

TCS offers a wide portfolio of comprehensive solutions, including several modules targeted at specific industry needs. TCS has a strong global delivery concept, with dedicated onshore and nearshore presence in the U.S.

Wipro's portfolio includes many well-developed and mature industry solutions. With extensive experience and deep expertise in numerous industries, Wipro applies a proprietary Click-Shift-Drive model for implementations based on industry clouds. Wipro has a longstanding partnership with Salesforce covering product development and other areas.

LTIMindtree

Rising Star **LTIMindtree's** portfolio includes powerful accelerators specifically developed for the needs of several industries. With its product/managed package evaluation, the company helps clients to identify the most appropriate way to implement Salesforce.

Tech Mahindra (Rising Star) offers several predefined solutions for various industries. The provider offers services based on a mature price model, including numerous outcome-based elements and As-a-Service elements. Tech Mahindra can refer to significant achievements in certifications for industry-specific solutions.

Leader

> "HCLTech's Salesforce portfolio includes many powerful industry solutions."
>
> *Rainer Suletzki*

HCLTech

Overview

HCLTech is a technology company that offers software, IT infrastructure and business process outsourcing services worldwide. The company also offers hybrid clouds, digital workplace and cloud native services, together with service integration and management. HCLTech is headquartered in Noida, India, and operates in 60 countries. It has over 222,270 employees across 215 global offices. In FY22, the company generated $12.3 billion in revenue.

Strengths

Partnership with Salesforce: HCLTech has a strong partnership with Salesforce, including cooperation in product and service development through a joint solution advisory team. HCLTech is represented in Salesforce's program boards for industry clouds development.

Scalable agile methodology: HCLTech's methodology offers project work and post-deployment support in an interrelated way, which means that support and build activities are executed together. This enables the company to provide the respective services in an agile and scalable way.

Compelling industry expertise: HCLTech offers implementation expertise for multiple industries, such as financial services, manufacturing, telecommunications and others. Its portfolio includes powerful predefined solutions for these industries.

Project efficiency by numerous accelerators: The HCLTech portfolio includes various accelerators mostly designed to increase efficiency during project execution. Productivity tools such as a test class generator are also a part of its offerings.

Caution

The company should strengthen its industry-specific expertise by offering predefined solutions for additional verticals such as automotive or process industries.

The existing and well-structured product and service catalog should be complemented by guidance to choose between industry cloud products and classic functional clouds.

Appendix

The ISG Provider Lens™ 2023 – Salesforce Ecosystem Partners analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of January 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Salesforce Ecosystem Partners market

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

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

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

5. Use of Star of Excellence CX-Data

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

7. Use of the following key evaluation criteria:

   * Strategy & vision

   * Tech Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * CX and Recommendation

Author & Editor Biographies

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

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

iSG Provider Lens™

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

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

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

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ISG Provider Lens™

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