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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of February 2019, 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 lead author for this report is Rainer Suletzki. The editor is Heiko Henkes.
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EXECUTIVE SUMMARY

The Salesforce Ecosystem with Specific Focus on Sales and Service Cloud and Recommended Apps

Since the company was founded in 1999, Salesforce has shown significant growth and is today the world's leading provider of cloud-based CRM functionality (SaaS). From the beginning, Salesforce has always focused on agile implementation and a high level of standardization, which in turn enables the company to issue frequent application updates. Furthermore, it helps clients to complete rapid implementations that can start with limited functional scope and then be enhanced over time. Meanwhile, the company's continuous development of software has led to a variety of products being offered. The most mature are Sales Cloud (for supporting the main activities of salespeople) and Service Cloud (for supporting the main topics around customer service and the activities of the field service employees).

The growing functionality has led to a situation where implementations are increasingly being conducted on an enterprise level resulting in broader scope and additional major needs for integration into the client's respective system landscapes. A growing number of clients today are asking for consolidation of several Salesforce installations that have been deployed over the years in different organizational units. This implies that the availability of experienced implementation partners has become a critical success factor for the productive use of Salesforce.

In most cases, the client's functional requirements lead to so-called multi-cloud implementations including several Salesforce products. For example, in most cases a standard implementation is comprised of Sales Cloud and Service Cloud functionalities. Therefore, implementation partners need to be capable of supporting several, if not all, of the Salesforce products to be competitive. In general, the selections of providers that are relevant for the different segments and products usually do not strongly depend on the specific product being considered. The ability to work with multiple Salesforce products is important to provider positioning. However, there are some service providers with specific strengths in one Salesforce product, which leads to a different positioning within the respective segment.

The often rather complex system landscapes that a Salesforce implementation needs to be integrated into require a well-developed procedure model that considers the specific requirements. Many providers offer a modified agile methodology that includes elements of a phased procedure model, particularly in the project scoping and definition phases, and in the deployment phase. The core development parts of
Two basic types of providers can be distinguished according to how they address integration needs in a complex environment:

- There are providers that have a strong focus on system integration offering, beside the Salesforce-related competency, capabilities regarding other technologies and/or software packages that also allow them to cover the integration aspects of a project. Many clients that require this type of integration operate globally, and so quite naturally, many providers that offer this capability are also global companies.

- There are providers that focus mainly upon Salesforce core functionalities, and in most cases, also on a mainly agile approach to implementation. Projects that need significant integration with other packages will require respective knowledge on the clients’ side, or the involvement of another provider with the needed competency. Typically these “Salesforce only” providers have a limited size but are highly capable in their specific knowledge area due to their high specialization. They can serve all types of clients, but are best suited for projects with limited size and low integration needs.

Clients in the German market have some specific characteristics. Germany has traditionally had numerous midsize companies acting on a global scale and hence, have significant complexity in their system landscapes. Many of these companies are significant players in the automotive industry or other manufacturing segments. They often tend to prefer regional IT providers that can cover the requirements evolving from global operations and complex system environments. When selecting a global player as implementation partner, these clients require, at the least, the respective service provider to have a strong workforce in Germany.

Besides assessing Salesforce consulting and implementation partners, this study reflects another major part of the Salesforce ecosystem, that of functional extensions of Salesforce products. As indicated above, Salesforce has a strong focus on standardization, and hence, agile implementation opportunities, which on the other hand leads to some limitations in the functionalities that are provided. These limitations are compensated by a large network of independent software vendors (ISVs) within the ecosystem that provide a broad variety of apps that are based upon the Salesforce platform. Clients can use the ISV offerings to extend their respective installations with functionalities that go beyond the Salesforce standard. Salesforce explicitly supports this approach by providing an online application marketplace for third-party applications, called AppExchange. Applications that are offered on this marketplace are either available for free or require a separate contract with the ISV through yearly or monthly subscription models.

This report provides three lists of recommended apps (based on our research) that are offered on the AppExchange marketplace. One list is comprised of 20 apps that are suitable for a cross-industry use. The other two each have 10 apps each that are suitable for the healthcare and the manufacturing industries. The lists include a rating of each application based on the score we calculated from five basic criteria; however, the lists do not provide a ranking due to the very different scope and functional areas being offered.
This study examines various offerings around the Salesforce platform for the German market, and the Germany, Austria and Switzerland (DACH) region where noted.

On the one hand, it analyzes providers that act as implementation partners for Salesforce and offer services to design, configure and implement solutions for clients of the Salesforce platform. The focus of this study is on the Sales Cloud and the Service Cloud products within the Salesforce platform, as these are the most mature products within the Salesforce portfolio. Because Salesforce has been achieving significant growth over the recent years, there is a huge demand for this type of implementation support, and for the maintenance of already existing implementations. Salesforce itself runs an implementation support
On the other hand, the study gives consideration to the fact that the Salesforce ecosystem includes many independent software vendors (ISVs) that develop and offer applications that are based on the Salesforce platform, and that provide functional extensions and/or industry-specific additional functionality to this platform. These apps are made available on Salesforce's AppExchange store and require a separate contract between the client and the respective application provider. While implementation partners are evaluated based on standard Provider Lens methodology and categorized into quadrants, the application ISVs are presented based on a different approach due to their limited scope and their varying functionality. This report presents three separate lists of recommended apps that deserve special attention due to their specific functionality or their focus on a specific industry.
Definition (cont.)

Scope of the Report

Professional Services for the Salesforce Sales Cloud and Service Cloud

This segment addresses the providers of professional services for companies that use or intend to implement the Salesforce Sales Cloud and the Service Cloud, which are the most mature products in the Salesforce portfolio. They have naturally the same technological foundation, and in most implementations of a Salesforce solution, functionalities of both products are utilized. The Professional Services quadrant analysis includes the respective abilities of providers in consulting, configuration and implementation of a Sales Cloud application for the client and the go-live support. Integrating Salesforce into existing landscapes is usually also part of the respective projects.

The focus is on providers that are capable to cover the requirements of clients that operate from Germany. Many of these clients have a global business; therefore even regional providers must be able to offer implementation services for such clients.

Salesforce Apps

This segment considers providers of apps that are based on the Salesforce platform and provide additional functionality. Criteria for consideration are functional breadth and depth of the applications, the provider’s continuous maintenance and versioning, price model clarity, comprehensiveness of user support and customer satisfaction feedback. Since the functional differences between the numerous apps are too significant, there is no ranking presented in this study. Salesforce ISV evaluations are not presented in a quadrant because the functional differences of their software too significant. Instead, ISG identified 20 recommended independent applications for Salesforce that our research determined are suitable for clients in organizations across industries, plus 10 specific to the manufacturing vertical and 10 specific to healthcare. Assessments were made mainly based on publicly available information; however, a few providers actively participated by submitting specific information.

The apps usually do not exhibit some kind of regional scope or limitation and can be used by clients across the globe. Only a few apps are mainly used in the DACH region.
Introduction

Provider Classifications

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

Leader

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

Product Challenger

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

Market Challenger

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

Contender

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

Rising Star

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

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.
## Salesforce Ecosystem - Quadrant Provider Listing 1 of 1

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Definition

This segment addresses the providers of professional services for companies that use or intend to implement the Salesforce Sales Cloud or Service Cloud. The professional services quadrant analysis includes the respective abilities in consulting, configuration and implementation of a Sales Cloud application for the client and the go-live support. The main professional services for applications that are already in production are maintenance and additional development. Integrating Salesforce into existing landscapes is usually also part of the respective projects and can be particularly challenging for providers when they serve enterprise clients because there are usually complex system landscapes to be considered.
The main functionalities of the Sales Cloud are:
- Contact Management
- Opportunity Management
- Lead Management
- Workflow and Approvals
- Sales Forecasting
- Email Integration
- Reports & Dashboards
- Salesforce Mobile.

The main functionalities of the Service Cloud are:
- Customer Service
- Self Service
- Workflow and Approvals
- Digital Channels
- Field Service including Mobile
- Reports & Dashboards.
**Main Rating Criteria**

The most important criteria that were used in the evaluation are as follows:

- Technological competency regarding Sales Cloud and Service Cloud
- Managed Services portfolio attractiveness
- Predefined solutions
- Unique capabilities and differentiators
- Execution capabilities / Workforce
- Broad client base.

**Observations**

Sales Cloud and the Service Cloud are the most mature products in the Salesforce portfolio, and the providers active in this market mostly have a proven record of respective implementations of those products. The current market has the following characteristics:

- Major differentiators among service providers are the so-called accelerators and the industry specific solutions they offer. These assets are used to make the best use of the agile implementation approach that is possible with the Salesforce type of SaaS application. To a large extent the provider positioning in the segment reflects the accelerator and industry-specific solution elements of their respective portfolios.

- In general, it appears that many providers have a slightly stronger position in Sales Cloud than in other product segments, since it deals with the basics of the CRM functionality like CPQ (configure price quote), opportunity management and others. Service Cloud implementations can mainly cover two major areas.
One is the functionalities that refer to the customer service as part of the sales process. Examples include contact center functionalities, customer portals and more. These functionalities are usually not isolated, but are used in combination with sales functionalities like CPQ, opportunity management and others. Most of the Service Cloud implementations fall into this category.

On the other hand, some cases require functionalities to support field service personnel in performing their tasks. These functionalities can for example refer to product specifications in case of repair services, or spare part supply management in case of device maintenance. Field support projects usually also have strong demand for mobile offline capabilities, to ensure continuous operation independent of network connections.

- While many Salesforce customers are major companies, midsize firms are also an important client target for providers, particularly in the German market. Although these clients have limited size, many of them nevertheless operate on a global scale and therefore have a complex system landscape for Salesforce integration. This opens the opportunity to achieve a significant position in the market for providers other than the large and globally operating system integrators.

- While some of the global system integrators can refer to a significant regional presence in Germany others still need development in that regard, and so not all of the global players have achieved Leader status in the German market.
The following providers have been identified as Leaders: Accenture, Bluewolf (an IBM company), Capgemini, Deloitte, Deutsche Telekom, Infosys, NTT DATA, PWC.

- Accenture operates, in terms of the workforce, one of the largest Salesforce implementation partner practices globally and can refer to a broad and long experience. The company has had a strong presence in Germany for a long time. The portfolio offers numerous predefined solutions that cover technical and project execution aspects as well as industry specifics.

- Bluewolf had already a strong position in the U.S. for a long time with focus on rapid implementations and broad industry expertise. Since being acquired by IBM in 2016, the company is expanding its presence outside of the U.S. significantly, including a dedicated practice in Germany. Bluewolf is a strong partner for Salesforce implementations serving clients with global operations.

- Capgemini is a globally operating provider of IT services that can refer to a rich experience with CRM in general and particularly with Salesforce. The functional expertise is complemented by a deep knowledge of industry specifics. The company offers a highly scalable and flexible delivery model most suitable specifically for large enterprise clients. The company has maintained a strong presence in Germany over a long period of time.

- Deloitte has a large Salesforce practice operating on a global scale and has had traditionally a strong position in the German market. The portfolio offers numerous predefined solutions covering the improvements of efficiency in the project execution as well as industry specifics.

- Deutsche Telekom is clearly a strong regional player focused on DACH and particularly on the midsize client market. The Salesforce practice of Deutsche Telekom was established approximately five years ago and has had continuously strong growth since then.

- Infosys has traditionally shown a significant presence in Europe and particularly in Germany. The portfolio offers a comprehensive development environment for Salesforce implementations as well as powerful industry solutions, namely for Automotive and Healthcare.
PROFESSIONAL SERVICES FOR
SALES CLOUD AND SERVICE CLOUD

Observations (cont.)

- NTT DATA has a strong Salesforce related portfolio and provides a sophisticated delivery model with a relatively high share of nearshore resources. The portfolio covers productivity-oriented solutions as well as industry specific functionalities, and the company can refer to a rich experience regarding Salesforce implementations. Germany is one of the key markets for NTT DATA outside of the U.S.

- PwC has a strong Salesforce related portfolio with a specific focus on combining the business process transformation and the technology being used for this transformation. The company offers several industry specific solutions with healthcare being a focus area. Its German presence regarding IT Services and specifically Salesforce has been growing over the recent years.

Magnet360 (a Mindtree company), Persistent and Nagarro have achieved Rising Star status in this segment due to their foundations of a convincing service portfolio. All of them are in the process of building a stronger regional presence.

- Magnet360 is an implementation partner that has always been specialized on Salesforce implementations with a strong respective portfolio, such as numerous powerful accelerators. Meanwhile, being part of Mindtree, the company now has the ability to cover the integration with other packages as well. Magnet360 has established a dedicated German practice for Salesforce most recently.

- Persistent has a rather unique focus with its utilization Salesforce as an integration platform for a data-oriented system landscape. In addition to that, Persistent offers powerful accelerators and rich industry expertise. Most recently Persistent strengthened their regional presence by acquisition of the regional Salesforce service provider PARX.

- Nagarro has been classified as Rising Star because, as a subsidiary of the Allgeier Group that is based in Germany, its regional presence is already well developed and because its portfolio has been continuously strengthened recently.
Accenture is a global management consulting and professional services provider offering a broad portfolio of IT services in more than 120 countries. Its Salesforce portfolio covers consulting, implementation, migration and maintenance services and considers the digital transformation dimension along with this type of cloud-based solutions. Accenture reports it has 14,000 Salesforce dedicated resources available globally, including 5,400 that are Salesforce certified. The company traditionally has a strong presence in the German market and serves many of Germany’s leading companies.

Strengths

Scale and delivery model: Using workforce as a metric, Accenture is one of the largest providers of Salesforce-related services on a global scale. The expertise covers technology and the business process aspects of a Salesforce solution.

Presence in Germany: Accenture has five main locations across Germany. As authorized Salesforce training partner, Accenture operates a respective training center for the DACH region.

Vertical coverage: The Accenture portfolio offers powerful Fullforce solutions for 17 industries, which appears to be the most comprehensive coverage of potential Salesforce customers. For the Sales Cloud, the Accenture’s customer solution for digitalized shopping is notable for its ability to support tight integration between sales and marketing. Another example is the Accenture Retail Clienteling Solution, which allows store associates to build and extend customer relationships. Offering examples for the Service Cloud include the Service Agent solution that provides a 360-degree view of the customer along with full CTI integration, and for healthcare, the Intelligent Patient Platform that helps providers develop and deliver comprehensive patient engagement and care programs.

Productivity enhancers: Besides its industry-specific offerings Accenture provides several productivity solutions. For example, there is a solution to provide system diagnostics for Salesforce that generates an overview of current customizations, and a reusable technical library for Salesforce.

Caution

While the rich portfolio specifically covers large enterprise requirements, its suitability needs to be clarified for specific projects at companies with less complex needs.

Accenture should develop a dedicated delivery center for Salesforce-related services in Germany.

2019 ISG Provider Lens™ Leader

Accenture is an excellent partner for Salesforce-based solutions, especially for large enterprises with complex requirements.
Overview
Bluewolf is a global consulting agency, founded more than 15 years ago, that has always been solely Salesforce-focused. Bluewolf provides implementation and migration services for all products in the Salesforce solution portfolio and has a focus on digital transformation. In 2016, the company was acquired by IBM and since then has been operating as its Salesforce practice. The IBM acquisition is the basis for Bluewolf's current expansion outside of the U.S. and specifically in Western Europe.

Strengths

Focus and solution scope: Bluewolf has a clear focus on Salesforce and can refer to a long-term experience in implementing solutions utilizing various Salesforce products, specifically Sales Cloud and Service Cloud. More than 2,000 Salesforce-certified resources are available globally. The portfolio offers a comprehensive library of industry-specific assets, accelerators and expertise in the following industries: financial services, healthcare, manufacturing, higher education, public sector and new media. Bluewolf holds several Fullforce Master certifications, including Sales Cloud and Service Cloud.

Big Bluewolf – synergy with IBM: After being acquired by IBM, Bluewolf can utilize various other IBM capabilities, above all the interconnection with Watson for approaches relying on artificial intelligence.

Packaged services: To support rapid implementation, Bluewolf offers fixed price packages for highly standardized Sales Cloud and Service Cloud implementation (Bluewolf Go). In general, Bluewolf focuses mainly on agile methods to generate fast implementation results.

Targeted industry depth: the portfolio includes several Lightning Bolt solutions for various industries; for example, there is a solution for clinical trials and patient management. This is also an example of Bluewolf's specific expertise in the Service Cloud area.

Caution
The company provides only limited information about specific solutions that are available, such as accelerators, productivity tools, etc. The strong focus on Salesforce calls for the integration of other IBM practices or third parties for implementations in complex IT architectures that use different packages. Specifically, the SAP integration capabilities that are most important in the German market are not clear.

The presence in Germany shows still significant potential for expansion.

2019 ISG Provider Lens™ Leader
Bluewolf's strong Salesforce portfolio in combination with the outstanding IBM technological competency (including Watson) is a very attractive offering for clients seeking leading-edge CRM solutions.
Capgemini is one of the leading players in the Salesforce area with impressive technical expertise on a global scale.

While Capgemini shows broad competency for all relevant technologies, its focus on business processes and their related transformation has some room for being strengthened.

**Overview**

Capgemini is a globally operating provider of consulting, technology and outsourcing services present in 40 countries. Its portfolio is comprised of services for a broad array of technologies and has included Salesforce services for more than 10 years. The respective offerings cover the entire application lifecycle and the integration of Salesforce into the client's system landscape. With the heritage of being a European company, Capgemini traditionally has a strong presence in Germany because it is one of the most important markets in Western Europe.

**Strengths**

- **Broad CRM understanding:** Capgemini has strong experience in implementing CRM applications that is continuously leveraged for the growing Salesforce business. The provider offers with its CRM Modernization Services a highly standardized solution for rapidly migrating CRM applications to the cloud, particularly to Salesforce.
- **Integration competency with leading software:** Because the company covers multiple, broadly used standard application packages like SAP, it is well prepared for implementations within complex system landscapes that are quite common for large enterprises.
- **Depth and breadth of Salesforce talent:** Capgemini can rely on a strong workforce and operates a global delivery model that can tap domestic, nearshore and offshore resources. Its Salesforce-related headcount exceeds 2,200 globally, most hold certifications, and Capgemini holds a Fullforce Master certification for the Service Cloud.
- **Verticals expertise:** Its strong position in supporting financial services clients that use Salesforce is the basis for Capgemini's powerful ACE (All Channel Experience) accelerators for banking and for insurance. The customer service portfolio includes a cross-industry accelerator for enabling the client's field service that provides web browser-based functionality and mobile-enabled functionality. Another targeted solution example is the comprehensive Automobile Connected Service offering.
- **Risk/reward sharing:** Capgemini strives for a high share of fixed-price or outcome-based client engagements, indicating its willingness to take co-responsibility for the project results.

**Caution**

While Capgemini shows broad competency for all relevant technologies, its focus on business processes and their related transformation has some room for being strengthened.
Deloitte is one of the largest global management consulting providers and its digital practice offers a full range of services including strategy, multi-channel, custom development and managed solutions. Deloitte Digital is headquartered in the U.S. and operates Salesforce practices in more than 30 countries, and Germany has always been one of the most important markets for the company. Beyond general consulting, Deloitte has a specific focus on providing sophisticated industry solutions.

**Portfolio, approach and resources:** Deloitte focuses its Salesforce portfolio on integration and aligning business process definition with the technology to be used. The approach appears to be rather suitable for situations where digital transformation is a key requirement and there is more than a technical implementation is to be conducted. Deloitte can offer Salesforce-related service on a global scale through more than 4,400 experienced professionals, including more than 2,400 that are Salesforce certified. Deloitte holds Fullforce Master certifications for the Sales Cloud and the Service Cloud.

**Locations in Germany:** Deloitte operates 15 locations across Germany, which emphasizes this market's important role for the provider.

**ERP expertise:** Deloitte has capabilities to complete complex ERP integrations. One specific opportunity for clients to take advantage of is the combination of Deloitte's IT-related expertise with its financial advisory, audit and risk management competency.

**Industry coverage:** The portfolio includes several powerful Fullforce solutions that are mainly targeted at the financial, manufacturing and life sciences industries. It has several specific solutions for life sciences, mainly Service Cloud based offerings that cover relationships with patients and physicians.

Whereas the portfolio appears to be highly suitable for large enterprises with complex requirements, it remains to be proven if midsize companies can also sufficiently benefit from the offerings. The delivery model the focus appears to be on combining onshore with offshore; the share of nearshore resources could be strengthened.

Deloitte is one of the global leaders in providing Salesforce-related services, and focuses in particular on the combination of strategy and technology.
Deutsche Telekom is one of the largest technology providers in Europe and has its origin in the telecommunications industry. The company focuses mainly on the DACH market while operating a delivery organization with locations across the world to provide nearshore services to clients with business operations in the respective markets. The Salesforce practice of Deutsche Telekom was established approximately five years ago and has had continuously strong growth since then.

**Overview**

Deutsche Telekom is the leading Salesforce multi-cloud provider for midsize clients in the DACH region.

**Strengths**

**Standardization to maximize Salesforce value:** The Salesforce practice has a strong focus on standardization and hence strives for full utilization of Salesforce capabilities through configuration, but also serves customers in individual challenges and can add a wide range of developments to the standard. The methodology does properly consider each customer’s situation and readiness, and it combines agile and phase elements to reflect the specific case.

**Midsize experience:** Deutsche Telekom can refer to a rich experience with Salesforce implementations, specifically for midsize companies. The provider has been able to achieve significant growth in this market segment in recent years. Its overall customer satisfaction rating is outstanding. Deutsche Telekom uses onshore and nearshore resources in Brazil and the Czech Republic plus offshore capabilities in India. The portfolio includes several solution packages that cover the latest security and data privacy requirements imposed by the EU-DSGVO and the Cloud Act.

**Single-source capability:** An essential part of the Deutsche Telekom portfolio is its full-service offering combining Salesforce scalable licenses and project implementation from a single source. Within Europe, Deutsche Telekom is the only provider with this type of offering.

**Training Academy:** Deutsche Telekom operates a Salesforce Academy targeting at the sustainable education of qualified resources that is also available for the training of customer employees.

**Caution**

Deutsche Telekom should also offer accelerators and industry solutions as reusable packages to support faster standard implementations. Salesforce solution integration into complex system landscapes should be better reflected in the portfolio of Deutsche Telekom.

Deutsche Telekom should strive to increase the share of fixed-price or outcome-based projects in order to indicate its willingness to take over co-responsibility for the results of an implementation.

**2019 ISG Provider Lens™ Leader**

Deutsche Telekom is the leading Salesforce multi-cloud provider for midsize clients in the DACH region.
Infosys provides consulting and technology services globally. In recent years, it has focused its portfolio on digital transformation for clients’ core business processes. The services offered include CX consulting, UX strategy definition, architecture definition, agile implementations, global rollout execution, ecosystem integration, platform-based application modernization and support services. Infosys has deployment experience across various industry verticals and additional expertise with numerous ISV solution offerings that are based on the Salesforce platform.

Strengths

**Delivery model formula:** Infosys operates a global delivery organization with more than 3,000 Salesforce-dedicated resources. Its global delivery mix of onshore and offshore resources contributes to cost efficient project execution. Infosys recently announced it is putting high emphasis on future growth in Europe and specifically in Germany, where the company already operates seven locations. Infosys has an outstanding customer satisfaction rating.

**Deployment automation:** With its Agile Pro – Smart Development Platform, Infosys provides a comprehensive implementation environment with several automated steps (for example, Health Check, Continuous Deployment and others) that help to increase efficiency and speed in Salesforce implementation projects. Infosys has a focus on legacy to Salesforce migration to help clients achieve application rationalization and modernization of various platforms to integrate with the Salesforce platform. Another powerful tool in this context is the Sandbox Manager, which supports the parallel management of several Salesforce instances.

**Industry offerings:** Infosys has powerful industry solutions, namely for automotive and healthcare. The company covers Salesforce-based solution integrations into complex IT environments with its respective standardized solution packages. For Sales Cloud, Infosys’ preconfigured template for cross industry use is a remarkable offering. In the Service Cloud context Infosys offers several powerful solutions, for example Smart Field Manager - a field service platform (Connected Devices, Mobile experience, Field Service automation) and HR Case Management.

**Mature contract model:** The company's share of fixed-price or outcome-based projects in Germany is rather high and indicates that Infosys is willing to take co-responsibility for the engagement results.

**Dedicated Salesforce Practice in Germany:** Infosys has set up a dedicated Salesforce Practice in Germany and expanding Fluido’s presence beyond the Nordics into Germany.
Infosys has a strong focus on technology and tools, whereas its business process transformation capability should be strengthened.
NTT DATA is the IT services corporation within NTT Group, a technology provider that operates worldwide. NTT DATA’s Salesforce services provide enterprise-grade digital business transformation and business consulting and cover a broad range of client requirements, from advisory services and implementation services to management and support. NTT DATA is headquartered in the U.S. while the parent company has its headquarters in Japan. Traditionally, the company has a strong footprint in Western Europe.

**Overview**

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

**Strengths**

**Onshore resources plus nearshore and offshore support:** NTT DATA’s Salesforce-related workforce comprises of more than 700 certified consultants and is located in a way that covers the local markets and ensures working proximity for actual client locations by onshore consultants. NTT also uses several nearshore and offshore locations in various countries. Romania and Spain are used to serve European clients. NTT DATA has achieved outstanding customer satisfaction feedback.

**Methodology and governance approach:** The project methodology relies, to a large degree, upon agile methods but takes into account the customer readiness for that approach. Phase-oriented elements are included where required. NTT DATA puts heavy emphasis on a comprehensive governance model in its implementation projects.

**Industry accelerators:** NTT DATA offers several accelerators that are suitable for a cross-industry use, for example its Manufacturing in a BOX. For industry specific use, there are even more accelerators available, such as an Insurance Digital Platform or a Digital Transformation Lab for Telco. NTT DATA holds a Fullforce Master certification for the Sales Cloud.

**Integration capabilities:** NTT DATA offers a predefined and comprehensive SAP integration package as a proprietary product. Its SAP-focused subsidiary Itelligence in Germany gives NTT DATA additional capabilities in the market that can be leveraged for clients with SAP requirements.

**Caution**

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

Overview

PwC is one of the largest management consulting providers on a global scale and focuses its digital practice strongly on the intersection of business and innovation. The services combine industry and strategy knowledge with technology expertise. For Salesforce, the portfolio covers advisory, business transformation and implementation. The company has developed the capabilities regarding IT and digital transformation strongly over the recent years and is now putting more emphasis on the European markets in this regard.

Strengths

Blending technology and transformation: The PwC portfolio has a strong focus on the combination of business process transformation and the technology being used in this context. PwC's Total Retail Clienteling solution provides an integrated and personalized customer experience across store, social and mobile channels and is a good example of an innovative use of Sales Cloud. With its Patient Digital Care and Smart Agent for Healthcare, PwC offers very useful accelerators that cover two of the most important customer service relationships within healthcare processes, in particular the relationship of healthcare providers to patients and the relationship between health plan providers and their members. Both are examples of the innovative use of Salesforce Service Cloud functionalities.

Talent base: With its more than 800 Salesforce-certified consultants PwC can rely upon a strong workforce that is mainly onshore in the U.S. and Europe. Specific strengths are in supporting clients through the strategy and solution design phases, architecting the entire system landscape and in giving appropriate consideration to the change management activities that are required in major transformation processes.

Salesforce certifications: PwC holds Fullforce certifications for several Salesforce products, including certification for the Sales Cloud.

Caution

Companies with challenging IT environments must evaluate PwC's ability to provide the necessary integration with their other solutions before engaging on a Salesforce project.

While PwC has several locations in Germany, there is still potential for the company to improve its IT capabilities in general and its Salesforce capacities specifically.

2019 ISG Provider Lens™ Leader

PwC offers a compelling combination of strategic consulting with strong implementation capabilities for the Salesforce products.
RISING STAR: MAGNET360 (BY MINDTREE)

Overview
As Mindtree’s Salesforce practice, Magnet360 brings 14 years of Salesforce expertise into the Mindtree portfolio. Magnet360 focuses only on the Salesforce portfolio and exhibits a strong expertise across all the respective products and various industries. The company is headquartered in the U.S. and established a European hub located in Munich two years ago.

Strengths

Industry solutions and accelerators: Magnet360 has several industry solutions, including offerings for consumer packaged goods and retail, manufacturing (including IoT aspects), financial services (where it has a focus on insurance and partners with Duck Creek) and the Patient Engage solution for healthcare. Connected Manufacturing from Magnet360 provides a powerful and innovative solution for Service Cloud that uses IoT elements extensively.

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

Attention to data quality: Data management gets high attention in Magnet360’s project methodology, which includes measuring data quality as part of the business performance assessment. This approach allows quality assurance for the final results of an implementation project.

Strong presence in Germany: The Europe Nearshore Consulting Hub in Munich was founded two years ago and can already refer to several significant customer engagements. It is now increasing scale and can be expected to achieve a leading market position in the upcoming years.

Caution
Magnet360 has a very strong focus on agile methods, specifically in the development and implementation phases. When system landscapes are complex Magnet360’s integration aspects may not be well suited for agile approaches and a more hybrid approach with some phase-oriented elements may be called for.

Complex integration is done by Magnet360 in tandem with its parent company Mindtree since this is no focus area in Magnet360’s own portfolio.

It should be pointed out more clearly that Magnet360 follows the Corporate Compliance Program of its parent company Mindtree.

Magnet360 provides a strong Salesforce related portfolio with numerous productivity tools and comprehensive industry solutions.
RISING STAR: NAGARRO

Overview
Nagarro is a software development and business consulting company that provides consulting and technology services. It is headquartered in Munich, and is a subsidiary of the German based Allgeier SE Group, with Salesforce as one focus area. The company provides end-to-end solutions to complex business problems at various stages of software life cycle, including integration, implementation, customization and post-implementation services like application management, system administration and testing.

Strengths

Business + technical approach: Nagarro’s Salesforce practice combines business domain experts with technology experts to optimize the outcomes of a Salesforce system and its integration with other enterprise applications and third-party software. The services cover the entire lifecycle, from strategy consulting through design and implementation to post-deployment support and ongoing application management. It puts strong focus on agile methods to best utilize the capabilities of SaaS-based solutions.

Integration and emerging technology focus: The technology areas Nagarro supports and focuses on are ERP integration, middleware integration, analytics, reporting, business intelligence and mobility solutions.

Consolidation of instances: As a specific service, the portfolio explicitly emphasizes the consolidation of several Salesforce instances within a company into one. This capability will most probably become more important in future since the rapid expansion of Salesforce over the recent years has often led to numerous implementations within the same client organization, for example, in different sales departments.

Market coverage and complementary network: Nagarro has strong presences in Germany and the U.S. and can also refer to its partner companies within the Allgeier Group. The company can take advantage of its comprehensive expertise for many industries.

Visibility console: A good example of Nagarro’s Service Cloud capabilities is its development of a central platform for providing a unified customer view. The solution includes omnichannel support, automatic case assignments, language detection, CTI integration, chatter and a configured knowledge repository for faster case resolution.

Caution
Nagarro should strengthen the role of accelerators and predefined solutions in its portfolio.
The company needs to increase its number of Salesforce-certified consultants.
Persistent Systems is a U.S.-based provider offering business consulting, design-led workshops, architecture, development, QA and deployment with a strong focus on the Salesforce products. Being a database-oriented software development company, Persistent has developed a rather specific approach that emphasizes the unified definition of data within the enterprise, and based on that definition uses Salesforce as an enterprise platform for integrated cloud services. With the recent acquisition of the Salesforce focused provider PARX the company has started to establish a strong presence in the German market.

**Implementation approach:** Persistent is one of few providers that takes a strongly data oriented implementation approach that is targeting at using Salesforce as an enterprise platform for digital transformation. This strategy is based on a well-defined foundation by what Persistent calls an API and data integration layer and providing the tools and products that are necessary for consistent data-focused implementation.

**Healthcare-specific solutions:** The Persistent portfolio includes a rich set of solutions specifically for healthcare with a strong focus on Service Cloud. The healthcare solutions cover the entire spectrum from patient care, spanning clinic-oriented functionality to the post-treatment activities. Persistent has Fullforce certification for its solutions in healthcare and life sciences vertical.

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

**Presence in Germany:** Persistent has a significant presence in Germany, mainly because of its recent acquisition of PARX, which is a Platinum-certified Salesforce partner in the DACH region. This subsidiary is expected to grow significantly over the next few years and is the basis for Persistent's future potential to reach leading position in this market.

Persistent should develop focus on additional vertical markets.

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

**Caution**

With its strong data-oriented approach and focus on using Salesforce as an enterprise platform, Persistent has the potential to achieve a leading position in this market.

**Overview**

**Strengths**

**Implementation approach:** Persistent is one of few providers that takes a strongly data oriented implementation approach that is targeting at using Salesforce as an enterprise platform for digital transformation. This strategy is based on a well-defined foundation by what Persistent calls an API and data integration layer and providing the tools and products that are necessary for consistent data-focused implementation.

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The following sections present three lists of apps on AppExchange that are recommended because the analysis taken in this study found they appear to be most promising for specific purposes.

- The first section covers applications that are suitable for a cross-industry use. The typical functionalities that are provided in this group of apps are CPQ (configure, price, quote), document management and some features that meet technical requirements, such as individual backup capabilities.

- The subsequent sections each list show 10 apps that are suitable for use in the healthcare and the manufacturing industries, respectively.
Recommended Salesforce Apps Published on the AppExchange Store

Definition and Observations (cont.)

- Typical functionalities that are provided for healthcare include compliance with specific regulations like ISO certifications or various good practices (GxP) or meet specialized functionality needs for a specific market segment, for example, medical device companies.

- Software for the manufacturing industry typically includes various levels of ERP functionalities beyond the sales processes that are covered in standard Salesforce. Some of these ERP functions extend across the entire supply chain, others focus on very specific activities like transportation management.

The lists come include a rating of the particular apps based on a set of five basic criteria, but do not represent a ranking because of the very different scope and functional areas being offered. Providers are listed in alphabetical order.
List of Recommended Apps for Cross-Industry Use

Introduction

The apps for cross-industry use consist mainly of three groups:

- There are apps that enhance core functionalities of the Salesforce Sales Cloud and Service Cloud. For example, several of these apps provide more sophisticated versions of the configure, price, quote (CPQ) functionality that basically supports the process from receiving a customer request to providing a quote.

- There are apps that add functionalities to Salesforce where the core functionality does not sufficiently support the respective business process. For example there are several apps for document generation and document management in general, or for specific documents like contracts.

- There are several utilities, such as to enable extended search or a user-defined backup.
### Top 20 Apps for Salesforce Customers in the Cross-Industry

#### App Exchange Store

**Fig 1**

<table>
<thead>
<tr>
<th>App</th>
<th>Functionality</th>
<th>Maintenance &amp; Updates</th>
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<th>Service &amp; Support</th>
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<tr>
<td>Apttus CPQ</td>
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<td>Apttus CPQ is a full configure, price, quote solution and is part of a complete suite on a common platform that is built native on Salesforce. It uses machine learning capabilities for getting data-driven insights, such as optimal price based on deal characteristics, history and margin analysis. Standard pricing is per user and month. The latest release was published in January 2010, according to the description on AppExchange.</td>
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<tr>
<td>Apttus Contract Management</td>
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<td>Apttus Contract Management is a solution serving the full contract lifecycle and primarily meets the needs of legal, procurement and IT organizations, but is also suitable for finance and sales. The main focus beside increasing efficiency is ensuring users follow mandatory and optional obligations through the process. It is part of a complete suite on a common platform that is built native on Salesforce. Standard pricing is per user and per month. The latest release was published in Nov 2012, according to the description on AppExchange.</td>
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<tr>
<td>Bullhorn for Salesforce</td>
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<td>Bullhorn Staffing &amp; Recruiting addresses staffing and recruiting processes, primarily for respective recruiting firms, but also suitable for enterprise HR departments. The functionalities include the core recruiting process, maintaining communities, conducting recruiting operations, accounting integration and specific analytics. Standard pricing is per user/per month. The latest release was published in December 2012, according to the description on AppExchange.</td>
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### Top 20 Apps for Salesforce Customers in the Cross-Industry 2 of 7

**Fig 1**

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<tbody>
<tr>
<td>Conga Composer Document Generation</td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td>Conga Composer is a solution for efficiently creating templates and documents using any standard or custom Salesforce object and with external data sources or systems where required. Conga Composer supports building processes and procedures into Salesforce for automated document generation. Standard pricing is per user/per month. The latest release was published in February 2019.</td>
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<tr>
<td>Coveo</td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 3 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td>Coveo provides an AI-powered search for the Service, Sales, Community and App Clouds. The out-of-the-box machine learning function analyzes and then optimizes the search experience based on successful outcomes so that future users find what they need faster. The embedded analytics helps to identify content gaps, understand user behavior and measure KPIs like case deflection. The latest release was published in February 2019.</td>
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<tr>
<td>Customertimes CT Mobile &amp; CT Presenter</td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 3 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td><img src="image" alt="Score 4 out of 4" /></td>
<td>The Customertimes solution consists of two main modules: Salesforce Offline and the Digital Sales Aid. It provides full offline capabilities for all Salesforce objects and a broad range of field service support functions, including interactive presentations, dashboards and more. It facilitates call planning, shelf audit, order taking, and other activity. The latest release was published in February 2019.</td>
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## Top 20 Apps for Salesforce Customers in the Cross-Industry

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<tbody>
<tr>
<td>d.velop Document Management</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>The app provides a powerful document management solution fully integrated into the Salesforce Lightning environment while offering the option to operate the storage of the data outside of Salesforce in the d.velop cloud in order to increase cost efficiency and to meet all regulatory requirements like DSGVO etc. The latest release was published in March 2019.</td>
</tr>
<tr>
<td>DocuSign eSignature</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>The DocuSign app is the leading eSignature solution for integrated use on the Salesforce platform. It meets the most relevant security industry certification standards and claims to use the strongest commercially available data encryption technologies. It can be used in with all Salesforce cloud solutions and is fully mobile enabled for any device. The standard pricing is per user and month. The latest release was published in October 2018.</td>
</tr>
<tr>
<td>Empolis Enterprise Service Express ESE</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>Empolis ESE is a comprehensive knowledge management solution to help service organizations process service cases. It is comprised of an intelligent search feature, a guided analysis of the service cases and machine learning capabilities for continuous improvement. It is fully integrated into the Salesforce Service Cloud and is very suitable for increasing service organization efficiency. The latest release was published in November 2018.</td>
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## Top 20 Apps for Salesforce Customers in the Cross-Industry 4 of 7

<table>
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<tr>
<th>App</th>
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<tbody>
<tr>
<td>Form Assembly</td>
<td>Score 4 out of 4</td>
<td>Score 3 out of 4</td>
<td>Score 2 out of 4</td>
<td>Score 2 out of 4</td>
<td>Score 2 out of 4</td>
<td>The solution provided by FormAssembly helps to generate any kind of forms, collect data by the forms and to relate these data to processes. The goal is to increase process efficiency by this functionality. The latest release was published in May 2018.</td>
</tr>
<tr>
<td>Gainsight Customer Insight</td>
<td>Score 4 out of 4</td>
<td>Score 3 out of 4</td>
<td>Score 2 out of 4</td>
<td>Score 2 out of 4</td>
<td>Score 2 out of 4</td>
<td>Gainsight provides a platform for gathering and managing numerous customer-related data like workflows, customer communications, satisfaction surveys and business related data. It supports an active management of the customer relation along the entire lifecycle. The latest release was published in February 2019.</td>
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<tr>
<td>Inspire Planner</td>
<td>Score 4 out of 4</td>
<td>Score 3 out of 4</td>
<td>Score 2 out of 4</td>
<td>Score 2 out of 4</td>
<td>Score 2 out of 4</td>
<td>Inspire Planner is a complete and native Salesforce project management solution. It can be used for projects of any size and is hence a good match for professional services organizations. Additional features include optimizing project management and collaboration by sharing projects with external team members. The latest release was published in May 2018.</td>
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### Top 20 Apps for Salesforce Customers in the Cross-Industry 5 of 7

<table>
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<tr>
<th>App</th>
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<tr>
<td>Kimble Professional Services Automation</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>The Kimble solution provides the most relevant functionalities for professional service management like revenue forecasting and recognition, resource planning, project management, budget and margin control, T&amp;E and billing. It includes built-in diagnostics and intelligence to guide users. It is easy to implement, does not require major configuration and provides relevant external integration. The latest release was published in October 2018.</td>
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<tr>
<td>Mapanything</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>Mapanything is a powerful mapping and territory management and optimization solution with full Salesforce integration. Route planning and optimization, analytics and field force management, including capacity planning, are substantial features. It is naturally fully mobile enabled and applicable globally. The latest release was published in November 2018.</td>
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<tr>
<td>New Voice Media Contact Center</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>NewVoiceMedia Contact Center is a powerful call center solution providing Salesforce telephony integration including CTI, IVR, ACD, click-to-dial, auto dialing, call recording and call routing. It automatically displays key customer data within Salesforce Sales and Service Cloud. It is used in more than 60 countries. The latest release was published in November 2018.</td>
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# Top 20 Apps for Salesforce Customers in the Cross-Industry

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<tr>
<td>Nice InContact</td>
<td>4</td>
<td>4</td>
<td>3</td>
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<td>3</td>
<td>Nice InContact Contact Center is an easy-to-install call center solution with focus on increasing agent efficiency while simultaneously improving customer experience. It automatically displays key customer data within the Salesforce Sales and Service Cloud synchronized with every customer interaction routed to the agent. It is applicable globally in more than 150 countries. The latest release was published in January 2019.</td>
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<tr>
<td>Nintex DocGen</td>
<td>4</td>
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<td>4</td>
<td>This Nintex app is a comprehensive solution for creating documents like contracts, invoices, RFPs and more on the basis of the usual business data. It is basically a drag-and-drop designer interface that makes it easy for people without coding experience to build automated solutions for existing manual document creation tasks. The latest release was published in February 2019.</td>
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<tr>
<td>Own Backup</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>OwnBackup provides automated and daily backups, mechanisms for comparing, and restoring, disaster recovery, sandbox seeding and replication, secure key management and more. It is very valuable for situations where user-inflicted data loss may occur and potentially result in significant damage. It helps to comply with enterprise security requirements, including GDPR aspects. The latest release was published in September 2018.</td>
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<tr>
<td>App</td>
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<tr>
<td>Service Max Field Service</td>
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<td>ServiceMax Field Service is a leading service management platform that is also available as native Salesforce app. It provides a complete set of field service business processes, including work order management, entitlements, pricing and invoicing. Additional features are Connected Field Service (with IoT support), Scheduling Optimization and Service Performance Metrics. The latest release was published in August 2013.</td>
</tr>
<tr>
<td>Trackwise Complaint Management</td>
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<td></td>
<td>This TrackWise app provides a comprehensive solution for quality and regulatory professionals to manage the entire complaint lifecycle—from complaint to investigation, root cause analysis and regulatory reporting. It satisfies internal and external compliance requirements including 21 CFR Part 11 and includes also electronic signature and audit trail. The latest release was published in November 2015.</td>
</tr>
</tbody>
</table>
List of Recommended Apps for Healthcare Organizations

Introduction

The recommended apps for Healthcare companies mostly focus on quality and compliance aspects that are essential for this industry and that are not supported sufficiently by Salesforce standard functionality. Others are supporting specific functions like clinic management, laboratory management or the sales and customer service processes specifically for pharma or medical device companies.
### Top 10 Apps for Salesforce Customers in the Healthcare Organizations 1 of 4

<table>
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<tbody>
<tr>
<td>Cognizant Med Vantage</td>
<td>💫</td>
<td>💫</td>
<td>💫</td>
<td>💫</td>
<td>n.a.</td>
<td>Cognizant provides with this app a comprehensive and integrated after-market complaint handling and field service solution for the medical device industry. The core functionalities include end-to-end service management and technician allocation plus work order, warranty and entitlement management. The solution is validated and GxP compliant. The latest release was published in November 2018.</td>
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<tr>
<td>Compliance Quest Quality Management</td>
<td>💫</td>
<td>💫</td>
<td>💫</td>
<td>💫</td>
<td></td>
<td>CQ Quality Management provides a full suite of quality management functionalities built on the Salesforce.com platform. It facilitates managing regulatory and compliance requirements on an enterprise level (EQMS) and incorporates numerous industry best practices. It is fully compliant with all relevant regulations like ISO certifications, GxP compliance and the regulatory compliance to 21CFR Part 11/Audit Trails and Electronic Signatures. While providing powerful functionality, it is still rather easy configure and administer. The latest release was published in March 2018.</td>
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<tr>
<td>Customertimes CT Pharma</td>
<td>💫</td>
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<td>💫</td>
<td>💫</td>
<td></td>
<td>CustomerTimes CT Pharma provides a full sales force automation solution specifically for the pharmaceutical industry built on the Salesforce platform. The app includes a 360-degree view on the customer, cycle planning, promo management, call &amp; visit planning and various reporting functions. It offers a full offline capability which is crucial for the use in the field service. The latest release was published in May 2018.</td>
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<tr>
<td>App</td>
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<tr>
<td>Dot Compliance Suite</td>
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<td>Dot Compliance Suite is a solution that simplifies and improves compliance management efficiency of quality for highly regulated industries. The solution is fully compliant with the FDA regulation 21 CFR Part 11 for validating electronic records. It is based upon numerous best practices and supports functionalities like life cycle management, electronic signatures, full audit trail history and record retention. The latest release was published in October 2018.</td>
</tr>
<tr>
<td>&quot;Optrascan CloudPath LIMS&quot;</td>
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<td>The app provides a cloud-based laboratory information management system (LIMS) on the basis of Salesforce technology. It facilitates easy-to-implement complete workflow optimization with focus on clinical sample management. The latest release was published in May 2017.</td>
</tr>
<tr>
<td>Osler Technology Clinical Performance Platform</td>
<td></td>
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<td></td>
<td>This app provides a standardised framework for clinical managers to assess, certify, validate and benchmark clinical procedures and workplace assessments, to better understand the competency of their teams, and extend their scope of practice. Hence, it is a tool for continuous improvement by applying a quality assurance cycle tailored to an individual practitioner's capability and experience. The latest release was published in January 2016.</td>
</tr>
<tr>
<td>App</td>
<td>Functionality</td>
<td>Maintenance &amp; Updates</td>
<td>Price Model</td>
<td>Service &amp; Support</td>
<td>User Reviews</td>
<td>Short Description</td>
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<tr>
<td>Riskonnect GRC</td>
<td>★★</td>
<td>★★</td>
<td>★★</td>
<td>★★</td>
<td>★★</td>
<td>Riskonnect provides an enterprise-wide GRC platform that supports risk, governance and compliance functions, internal audit, vendor management and policy management. The app helps to manage risks that could prevent an organization from achieving its objectives based on real-time, enterprise-wide, comprehensive risk information. It has the flexibility to adapt any framework such as ISO31000, COSO ERM, etc. The latest release was published in July 2012, according to the description on AppExchange.</td>
</tr>
<tr>
<td>Veeva</td>
<td>★★</td>
<td>★★</td>
<td>★★</td>
<td>✔</td>
<td>★★</td>
<td>Veeva provides a multichannel CRM for the life sciences industry that was built on the Salesforce platform and is suitable for globally operating companies. Functionalities include Orchestrated Multichannel Engagement and Team Based Selling and the solution is fully compliant with all relevant regulations, such as ISO and GxP certifications.</td>
</tr>
<tr>
<td>Vlocity Health</td>
<td>★★</td>
<td>★★</td>
<td>★★</td>
<td>★★</td>
<td>✔★</td>
<td>Vlocity Health is a health insurance solution that provides numerous digital front- and middle-office capabilities across business functions and lines of business. It is natively integrated into Salesforce. The functions include product configuration, quoting, underwriting, enrollment, onboarding, customer support and renewal processes connected to health plans. The latest release was published in December 2015.</td>
</tr>
</tbody>
</table>
### Top 10 Apps for Salesforce Customers in the Healthcare Organizations 4 of 4

<table>
<thead>
<tr>
<th>App</th>
<th>Functionality</th>
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<tr>
<td>Trackwise Quality Management</td>
<td>§  §</td>
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<td>§</td>
<td>n.a.</td>
<td>n.a.</td>
<td>TrackWise Digital is an end-to-end quality and compliance solution offering industry best practices in a simple, easy-to-use system that can be implemented quickly and accessed on any device. The app facilitates to manage internal, external and regulatory audits, and initiating planned or unplanned deviations. Automated validation help teams to proactively manage compliance. The latest release was published in August 2018.</td>
</tr>
</tbody>
</table>
List of Recommended Apps for Manufacturing Companies

Introduction

The recommended apps for manufacturing companies are mostly targeting on the enhancement of the mainly sales oriented functionality in Salesforce with basic or in some cases even enhanced ERP capabilities. Functionalities like order management, inventory management or shipping are supported by several apps. Very specific functions like supporting the compliance with global trade regulations or supply chain management can also be found among the apps.
# Top 10 Apps for Salesforce Customers in the Manufacturing Companies

### Figure 3

<table>
<thead>
<tr>
<th>App</th>
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<tbody>
<tr>
<td>Accounting Seed</td>
<td>4</td>
<td>4</td>
<td>2</td>
<td>4</td>
<td>4</td>
<td>This app provides a native Salesforce solution for general ledger, billing and cash receipts, accounts payable and cash disbursements, budgeting and project accounting. Payment processing is supported by a connection to more than 14,500 banks and credit card companies. It also supports some basic ERP functionalities like order management and inventory. The latest release was published in January 2019.</td>
</tr>
<tr>
<td>AscentERP</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>AscentERP is a native ERP solution built on the Salesforce platform. It supports warehouse management, inventory management, manufacturing, sales order, purchase order and shipping. Additional features that specifically help the physical movements of goods include support for RFID, wireless bar code scanning, bar code label printing and more. The latest release was published in November 2017.</td>
</tr>
<tr>
<td>CloudSense CPQ</td>
<td>4</td>
<td>3</td>
<td>n.a.</td>
<td>4</td>
<td>4</td>
<td>The Cloud Sense app is a comprehensive CPQ solution with a full quote-to-cash lifecycle from omnichannel CPQ through to billing. In contrast to several other CPG packages, the app also incorporates the order management functionality. Some e-commerce functionalities are supported, like intelligent shopping carts and mobile access for several functions mobile access. The latest release was published in January 2012.</td>
</tr>
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</table>
### Top 10 Apps for Salesforce Customers in the Manufacturing Companies 2 of 4

<table>
<thead>
<tr>
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<th>Short Description</th>
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<tbody>
<tr>
<td>Fujitsu GLOVIA</td>
<td>✨</td>
<td>🌟</td>
<td>🌟</td>
<td>🌟</td>
<td>✨</td>
<td>With the GLOVIA package, Fujitsu provides a powerful and fully customizable order management solution built on the Salesforce platform. Main functions are order management and fulfillment, invoicing, inventory management, MRP and work order management. The solution includes the interfaces to corresponding accounting solutions. The latest release was published in January 2019.</td>
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<tr>
<td>Legendary Supply Chain</td>
<td>🌟</td>
<td>🌟</td>
<td>🌟</td>
<td>🌟</td>
<td>n.a.</td>
<td>This app is primarily focused on the sourcing related aspects of the supply chain like tracking market prices for products and materials, tracking requests for purchases, including fulfillment time, and warehouse and inventory management. It fits best for service companies and the related parts management. The latest release was published in November 2016.</td>
</tr>
<tr>
<td>Neurored Cloud SCM &amp; TMS</td>
<td>🌟</td>
<td>🌟</td>
<td>🌟</td>
<td>🌟</td>
<td>n.a.</td>
<td>This app targets specifically traders and freight forwarders that are significantly involved in global trade. The main functionalities are supplier relationship management, import/export pricing, global trade management that considers custom duties, warehouse management and transportation management. Latest technologies like RFID, IoT and others can be utilized. The latest release was published in July 2014.</td>
</tr>
</tbody>
</table>
### Top 10 Apps for Salesforce Customers in the Manufacturing Companies 3 of 4

<table>
<thead>
<tr>
<th>App</th>
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<tbody>
<tr>
<td>Rootstock Cloud ERP</td>
<td>4</td>
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<td>3</td>
<td>4</td>
<td>4</td>
<td>The Rootstock ERP solution is a comprehensive package providing the entire stack of ERP functionalities on the Salesforce platform. Functionalities include material requirements planning (MRP), lot and serial control, shop floor control, inventory control and many more. Mobile functions facilitating automation for inventory, production, shipping, fulfillment and labor transactions are available on any mobile device. The latest release was published in June 2017.</td>
</tr>
<tr>
<td>Commercient ERP Sync</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>This app is a bidirectional sync solution for connecting Salesforce with many standard ERP systems. Objects that can be synced are customers, contacts, invoices, sales orders, payments, products, pricing, inventory, BOMs, serials, assets, warranties, AP and more. The data integration keeps changes made to the ERP and CRM system up-to-date simultaneously. The solution is suited for clients that keep their ERP system separate from Salesforce. The latest release was published in December 2018.</td>
</tr>
<tr>
<td>Streamline ERP</td>
<td>3</td>
<td>3</td>
<td>n.a.</td>
<td>4</td>
<td>4</td>
<td>The Streamline app provides a variety of features mainly for brokers, agents and global shippers. Functions like transport management, shipment management and vehicle track and trace are the specific focus. Other standard functions like order management and invoice management are also included. The latest release was published in June 2014.</td>
</tr>
</tbody>
</table>
### ZenKraft Multi Carrier Shipping

This app provides enhanced shipping functionality inside Salesforce for more than 30 shipping carriers such as FedEx, UPS, DHL, Canada Post, TNT and DPD. Core functionalities include document generation and package shipment, rate calculation and comparison, label generation and printing on leading thermal printers, automatic shipment tracking and more. The latest release was published in March 2019.
METHODOLOGY

The ISG Provider Lens™ 2019 – Salesforce Ecosystem research study analyses the relevant software vendors and service providers in the German market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Salesforce Ecosystem market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG’s internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements
Rainer Suletzki, Author
Senior IT Management Advisor, Germany

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

Rainer acts as independent consultant with a focus upon application management for SAP and specifically for SAP HANA. On behalf of ISG he conducts studies within the framework of ISG Provider Lens and takes on client projects with definition of IT strategy and the resulting sourcing decisions.

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

Rainer holds graduate degrees in Economics and Computer Sciences.
Heiko Henkes, Editor
Director Advisor

Mr. Henkes is a Director Advisor at ISG; in this role, he is responsible for strategic business management and acts as leader of ISG's team of research advisors. He is also in charge of bringing together IT trend topics within the digital transformation context and acts as keynote speaker on current and future IT trends.

Since 2013, Heiko has advised both ICT providers and users on current digital transformation topics such as Cloud Computing, Artificial Intelligence and the Mobile Enterprise.

In his work with IT Providers, he has a focus on go-to-market strategies and strategic portfolio development as well as on the strategic marketing and sales development. Heiko also analyzes and evaluates business processes, product-specific target markets and IT provider through classical competitive analyses. Within this context, Heiko supports companies to undergo continuous transformation, combining IT competencies with sustainable business strategies and change management.

His primarily focus lies on business development activities, further development and internationalization of the ISG Provider Lens™ (IPL) product-related processes beside his role as IPL Topic Leader to guide and sync all analyst team members.

Before joining ISG (Experton Group), Heiko worked as analyst manager for TechConsult GmbH.

Heiko holds a degree in economics with a major business informatics and marketing of the University of Kassel and is fluent in English.
ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 70 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry’s most comprehensive marketplace data.