*ISG* Provider Lens™

Salesforce Ecosystem Partners

Germany 2020

Quadrant Report

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

March 2020

Customized report courtesy of:

Mindtree
About this Report

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

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EXECUTIVE SUMMARY

The Salesforce Ecosystem and its Structure

Since its inception in 1999, Salesforce has shown impressive growth and is now one of the leading providers of cloud-based application systems in the form of a Software-as-a-Service (SaaS). The focus was always on implementation with agile methods and a high degree of standardisation, which gives the company the opportunity to roll out updates at comparatively short intervals. In addition, it enables the customer to first carry out a quick implementation with a possibly limited functional scope and then to expand the application quickly.

The Salesforce portfolio now includes a whole range of products, which are differentiated both from a functional point of view and are, in the meantime, partly based on specific industries. In the case of the functionally oriented products, the Sales Cloud and the Service Cloud, which were the first products and which, therefore, undoubtedly have reached the highest level of maturity, should be mentioned first. Other products include the Marketing Cloud and the Commerce Cloud. Examples of industry-oriented products are the Health Cloud and the Financial Services Cloud.

Many companies rely on external service providers for the implementation and operational support of Salesforce-based applications, since the detailed in-house knowledge required for this is only partially available or only to a limited extent. The following facts are of particular importance when choosing a suitable provider: The complexity of the underlying system landscape tends to increase significantly with the size of the company. Another factor that increases complexity is when a global roll out is required within an international group. For this type of company, providers are, in most cases, the first choice who have extensive know-how for system integration and who also operate on a global level i.e., the so-called system integrators. This often goes hand in hand with the need to consolidate several independently created Salesforce instances, which are mainly operated by the specialist departments themselves, without involving the respective IT departments of the company. And finally, detailed knowledge of and corresponding implementation skills for other common software packages are an additional requirement for providers in this area. These framework conditions mostly lead to an implementation method, which, in contrast to the purely agile approaches that were used in most early Salesforce projects, is characterized by the combination of agile elements for the implementation part on the one hand with phase-oriented elements for strategy, design and roll out on the other. The common term for this approach is “Hybrid Agile”.

The predominantly agile implementation approaches are still an option for small and medium-sized companies with a limited international market presence or for cases, in which an implementation for subsidiaries with a limited scope is required within an international group. For this market segment, integration and consolidation are not as relevant as for the above-mentioned global groups. Therefore, medium-sized service providers that focus exclusively on Salesforce and agile implementations have a significant market share. These providers are often referred to as “boutique providers”.

In this study, the two main categories of providers discussed above are largely associated with different quadrants (see the relevant description in the “Introduction” section below). Another important trend in the Salesforce ecosystem in recent years is ongoing consolidation. This is mainly reflected in many acquisitions from boutique providers by the major system integrators. An important reason for this trend is the obvious fact that
the system integrators can achieve a rapid growth of resources with Salesforce expertise and thus better meet the increasing demand for the respective services. In addition, this way, the company’s own methodological approaches can be expanded to include the agile procedures that are characteristic of most boutique providers. However, it seems to be a challenge to bring these two different corporate cultures together in one organization. This is shown by the fact that in many cases the acquired companies still operate under their own label and are not integrated into the organization of the respective parent company.

A strong network of partnerships with independent software providers (ISV) within the Salesforce ecosystem is of great importance for all providers, regardless of their position as a system integrator or boutique. The main reason is that industry-specific requirements or extended requirements with regard to certain functions such as Configure-Price-Quote (CPQ) often go beyond the highly standardised range of functions of Salesforce products. In order to avoid individual developments in these cases as far as possible, the products of the ISVs are used. These solutions are typically offered as independent products with separate licensing, which, of course, must be considered when evaluating the potential costs associated with a Salesforce-based application. Salesforce operates a special portal for these solutions called “AppExchange Store”, which provides comprehensive information about the ISVs and their products (usually referred to as “Apps”). Salesforce ensures that the individual apps meet the basic requirements for software quality, such as troubleshooting, maintenance cycles, compatibility with Salesforce products, etc.
**Introduction**

**Definition**

In the present study “Salesforce Ecosystem” different offers concerning the Salesforce platform are examined.

First, providers are analysed who act as implementation partners for Salesforce and who design, configure and implement solutions for customers of this platform. This group differentiates between the following different types of providers: On the one hand, there are providers who, in addition to their own products across all Salesforce products, can also integrate Salesforce-based solutions into complex system landscapes. On the other hand, providers are taken into account that largely specialise in the implementation of pure Salesforce applications. A distinction is made between the so-called core clouds (sales cloud, service cloud, commerce cloud) and the marketing cloud.

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementation &amp; Integration</td>
<td>Services for Core Clouds, Marketing Cloud, Managed Application Services</td>
</tr>
<tr>
<td>Services</td>
<td></td>
</tr>
</tbody>
</table>

In the following, the providers who act as implementation partners for Salesforce are presented in the ISG Provider Lens™ Quadrant Report 2020.

Source: ISG 2020
In addition, the study analyses providers who support their customers in the operation of the implemented Salesforce solutions with their services (Managed Application Services).

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

- Differentiated positioning of the service provider according to the segments
- Transparency in the strengths and weaknesses of providers / service providers
- Differentiated positioning of the service provider according to the segments

Our studies thus provide an essential basis for decisions regarding positioning and go-to-market considerations. ISG advisors and corporate customers also use information from these reports to evaluate their current and potential new provider relationships.

**Scope of the Study**

This study examines various offers concerning the Salesforce platform for the German-speaking market. It covers four different market segments, in which the most important service providers registered in the Salesforce AppExchange portal and the most important Salesforce partners are evaluated.

The "Implementation & Integration Services" quadrant analyses the providers of implementation services for Salesforce applications and their integration with other important standard software solutions that are normally part of the complex system landscapes of large, globally operating groups. These services include advice, configuration and implementation of the respective applications for the customer, integration into the customer's system landscape, data migration and go-live support.

The "Implementation Services for Core Clouds" quadrant examines providers who largely specialise in Salesforce Sales, Service and Commerce Cloud and also focus primarily on an agile approach to implementation. An important aspect is advice on the redesign of processes using Salesforce applications. These providers are usually best suited for projects without a large integration need, usually for medium-sized and small customers.
The “Implementation Services for Marketing Cloud” quadrant examines providers who have in-depth knowledge of the Salesforce Marketing Cloud and also focus primarily on an agile approach to implementation. In addition to general aspects, in-depth knowledge of marketing-specific aspects such as the use of media and multi-channel approaches for the collection of information, the customer experience and the optimisation of the digital customer journey are essential in this segment. In this special marketing context, the need for integration into complex system landscapes is mostly limited.

The “Managed Application Services” quadrant refers to the ability of providers to offer so-called managed services for maintenance and support functions, including monitoring, remote support, centralised management of Salesforce applications, ensuring data quality, management of data security and compliance-related aspects. The following evaluation criteria apply to all the quadrants mentioned:

- Use cases
- Unique selling points
- Economic stability
- Market position

The following additional criteria are applied in the three implementation quadrants:

- Pre-configured solutions, so-called accelerators, as well as basic solutions (templates)
- Partnerships

The following three criteria are also relevant when evaluating the quadrant Managed Application Services:

- Maturity level of the delivery model and the applied contract models
- Specific experience in supporting the Salesforce applications
- A sizeable customer base
Introduction

Provider Classifications

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

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**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.
Rising Star

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

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.
Salesforce Ecosystem Partners - Quadrant Provider Listing 1 of 3

<table>
<thead>
<tr>
<th>Provider</th>
<th>Implementation and Integration Services</th>
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### Salesforce Ecosystem Partners - Quadrant Provider Listing 3 of 3

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</table>
Salesforce Ecosystem Partners Quadrants
providers that have strong integration capabilities and are acting on a global scale by themselves. Most large enterprises have a mix of applications, including Salesforce, SAP, Oracle, Microsoft, homegrown applications and others. This mix means that enterprises need to investigate a service provider’s capabilities with other environments apart from Salesforce.

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

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

IT and technology leaders should read this report to understand the relative positioning and capabilities of partners that can help them effectively consume services from Salesforce clouds, integrations and analysis solutions and gauge their technical capabilities with those in other markets.

Security and data professionals should read this report to understand how providers meet the requirements of security and data protection rules in Germany for their Salesforce implementation and integration practices and how they compare to one another.
The "Implementation and Integration Services" quadrant analyses the providers of implementation services for Salesforce applications and their integration with other important standard software solutions that are normally part of the complex system landscapes of large, globally operating groups. These services include advice, configuration and implementation of the respective applications for the customer, integration into the customer's system landscape, data migration and go-live support.
Evaluation Criteria

The main criteria in the evaluation are as follows:

- Technological competence
- Delivery capacity
- Use cases
- Unique selling points
- Economic stability
- Market position
- Pre-configured solutions, so-called accelerators, as well as basic solutions (templates)
- Partnerships

Observations

As the coverage of integration and consolidation requirements is one of the key success factors in this segment, system integrators are expected to have a significant position in this market. On the whole, all leading providers in this segment have a broad knowledge of the entire Salesforce portfolio, including how to use the Salesforce development platform and analysis functions (Einstein). Most providers also maintain a broad network of partnerships with ISVs to meet requirements beyond Salesforce's standard capabilities with additional products from the Salesforce ecosystem. There are also significant differences in local market presence i.e., the local availability of German-speaking resources. Providers that have a significant share of near-shore capacity, usually from Eastern European countries, have an advantage here in their global delivery model.

The following providers have qualified as leaders in this segment: Accenture, Capgemini, Cognizant, Deloitte, Deutsche Telekom, Infosys, Pricewaterhouse Coopers (PwC) and Tata Consultancy Services (TCS).
Accenture has an outstanding position in the market, which is reflected in a remarkable resource base on a global level, a wide and long experience and numerous predefined solutions. These solutions cover both technical aspects as well as support for project implementation and industry-specific features.

Capgemini has extensive experience with CRM in general and Salesforce, in particular, and is also able to convincingly cover the integration with other important software packages. The functional know-how is supplemented by a deep knowledge of the industry-specific requirements. The company offers a highly scalable and flexible delivery model that is particularly suitable for the large customer segment.

Cognizant has distinctive functional know-how as well as deep knowledge in various industries with a special focus on healthcare. Cognizant has a long-standing partnership with Salesforce, which is reflected, among other things, in the joint development of talents.

Deutsche Telekom combines agile methods with phase-oriented elements to form a powerful process model. In addition, the company traditionally has a strong position in German-speaking countries and is also the only provider in Europe with a full service offering, including the reselling of Salesforce licenses.

Deloitte has an important Salesforce Practice, which also has a strong position in German-speaking countries. The portfolio offers numerous predefined solutions, both functional and for various industry-specific applications.
As part of its strong global position, Infosys also has an important branch in Germany. In addition to providing a comprehensive development environment for Salesforce implementations, the portfolio offers a range of powerful industry solutions, particularly for the automotive and healthcare sectors.

PwC has a strong Salesforce portfolio with a special focus on linking the design of business processes with the technology used for this purpose. The company offers various industry-specific solutions, with a focus on healthcare.

TCS has the necessary skills and knowledge as well as the capacities to implement Salesforce implementations especially for globally operating groups, which usually require integration into a complex and often hybrid system landscape. In addition to the strong offshore component, the delivery model has a clear focus on strengthening the near-shore and onshore presence in Europe.
ENTERPRISE CONTEXT

Salesforce Implementation Services for Core Clouds

This report is relevant to small and medium-size enterprises across all industries in the German-speaking markets evaluating service providers for Salesforce implementation services for core clouds.

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

The significant increase in Salesforce implementation services for core clouds drives the growth of most service providers in this segment. ISG research points to an ongoing consolidation of the medium-sized providers that are acquired by large system integrators which use the established brands of their acquisitions to strengthen their positions in the market. Some of the service providers increasingly use nearshore resources with German language skills to optimize costs in projects in addition to offshore capacities.

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

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

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

Security and data professionals should read this report to understand how the providers address the requirement of GDPR security and data protection rules for their Salesforce implementation and integration practices. The report also highlights the providers’ focus on data quality and how they compare to one another.
IMPLEMENTATION SERVICES FOR CORE CLOUDS

Definition

The “Implementation Services for Core Clouds” quadrant examines providers who largely specialise in Salesforce Sales, Service and Commerce Cloud and also focus primarily on an agile approach to implementation. An important aspect is advice on the redesign of processes using Salesforce applications. These providers are usually best suited for projects without a large integration need, usually for medium-sized and small customers.

Source: ISG Research 2020
Observations

The common use case in this segment is the implementation of multiple Salesforce clouds, with a focus on agile methods.

- The overwhelming impression is that many providers occupy a slightly stronger position in the sales cloud than in other product segments. In addition to the basic CRM functionality, the focus is on individual functions such as CPQ (Configure-Price-Quote) as well as customer and opportunity management.

- Another area with usually deep expertise on the part of the providers is the service cloud, in which the implementations cover two main functionalities. On the one hand, there are functions that relate to the associated customer service as part of the sales process. Examples of this are contact centre functions, customer portals etc. These functions are normally not to be viewed in isolation but are used in combination with sales functions such as CPQ (see above), opportunity management and others. Most of the Service Cloud implementations fall into this category. On the other hand, there are a number of use cases that primarily require functions to support...
Observations (cont.)

The following providers have qualified as leaders in this segment: Appirio (a Wipro company), Arlanis (a reply company), Bluewolf (an IBM company), Deutsche Telekom, Factory42, Mindtree, Persistent Systems. The company ec4u has also qualified for the status of a rising star in this segment.

- **Appirio** has deep Salesforce know-how and offers numerous preconfigured solutions that are managed and made available to customers in a solution library specially created for this purpose. In its market position, the company benefits significantly from the strong position of the parent company Wipro in the German market.

- **Arlanis** has extensive experience with multi-cloud implementations and has a special focus on all functions related to the end customer experience. The project methodology used also qualifies Arlanis as a competent implementation partner.

- **Bluewolf** can point to a long and successful market presence in German-speaking countries. The company offers a wide range of predefined solutions, standardised entry-level packages for the rapid implementation of Salesforce, and extensive industry expertise.

Furthermore, areas such as the development of independent solutions based on the Salesforce platform and the use of Salesforce Einstein for analytics applications should be mentioned.

Another noticeable trend is ongoing consolidation, in which medium-sized providers are usually acquired by the large system integrators. Some of the companies acquired through such transactions continue to operate as separate companies in the market for at least a few years. There is an impression that integration into the respective parent company is not the highest priority or, in some cases, may not even be intended. Instead, the system integrators want to use established brands to strengthen their position in the market.
Deutsche Telekom has a strong focus on the medium-sized customer segment and offers them a particularly comprehensive portfolio of design and implementation services, combined with a full service offering including the required Salesforce licenses via reselling.

Factory42 is a particularly suitable partner for medium-sized customers, who have specific know-how for the use of CRM for media companies as well as for medium-sized manufacturers and service companies active in project business. The company also offers a convincing range of training courses for project employees and users of the respective customer.

The Mindtree range combines high methodological competence with a comprehensive range of predefined solutions, especially for a number of industries. In its market position, the company benefits from the association with the parent company Mindtree.

Persistent Systems has a unique selling point with its primarily data-oriented approach. Another focus is the use of Salesforce as a central integration platform in the respective customer company. The company also has a wide range of predefined solutions. In recent times, it has strengthened significantly through the takeover of the established providers Parx and Youperience.

The ec4u portfolio has a clear focus on all aspects of customer relationship management. It also offers extensive industry knowledge and a high level of competence in analytics functionalities based on Salesforce.
Mindtree is a Salesforce provider of consulting and implementation services based in Minneapolis, USA. The company has broad expertise for all Salesforce products in various industries, is a Platinum Partner of Salesforce and has over 350 employees with Salesforce certifications. The company has been part of the Mindtree Group since 2016.

**Strengths**

**Range of preconfigured solutions:** The Mindtree portfolio includes a number of industry solutions, including for the consumer goods industry, manufacturing industry, financial industry and healthcare, where Patient Engage is a comprehensive solution for patient management. Special mention should be given to Connected Manufacturing, which, based on the Service Cloud, provides a powerful package for the manufacturing industry with linking of IoT elements. The corresponding Salesforce Starter Package from Mindtree is also relevant in the context of IoT.

**High methodological competence:** Mindtree brings a comprehensive and well-developed methodology for efficient processing to the respective projects. This includes tools for code analysis, optimisation of organisational structures, risk-based testing, etc. In the projects, special attention is paid to the initial phases, where suitable methods for strategy development and development of implementation plans are available with Fast Forward. The establishment of governance structures also receives special attention.

**Special focus on data quality:** In the Mindtree project methodology, taking measures to ensure data quality consumes a lot of space. The measurement of the data quality is used as an indicator of the process quality, which is a remarkable approach with regard to quality assurance in the project.

**Caution**

The project methodology with emphasis on agile elements should be supplemented with hybrid approaches, in order to better take into account the requirements of companies with less preparation for agile methods.
ENTERPRISE CONTEXT

Salesforce Implementation Services for Marketing Cloud

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

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

In Germany, the focus of Salesforce Implementation Services for Marketing Cloud is about enhancing customer experience. ISG research shows more custom solutions than the ones with reusable components. This preference means that service providers rely on development more than component libraries to help deliver Marketing Cloud implementations. Also, since marketing functions involve many enterprise customer and prospect transactions, a provider’s automation capabilities are important.

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

IT and technology leaders should read this report to understand the relative positioning and capabilities of partners that can help them effectively adopt Salesforce Marketing Cloud product services. It would also enable them to compare the technical capabilities, automation depth and development methodologies of the providers.
The "Implementation Services for Marketing Cloud" quadrant examines providers who have in-depth knowledge of the Salesforce Marketing Cloud and also focus primarily on an agile approach to implementation. In addition to general aspects, in-depth knowledge of marketing-specific aspects such as the use of media and multi-channel approaches for the collection of information, the customer experience and the optimisation of the digital customer journey are essential in this segment. In this special marketing context, the need for integration into complex system landscapes is mostly limited.
The main criteria in the evaluation are as follows:

- Technological competence
- Delivery capacity
- Use cases
- Unique selling points
- Economic stability
- Market position
- Pre-configured solutions, so-called accelerators, as well as basic solutions (templates)
- Partnerships

Departments responsible for corporate marketing focus particularly on the customer experience and often have strong media literacy. In addition, the respective business processes generally do not have many integration points with the rest of the system landscape within a company. Therefore, tailor-made solutions play a more important role in this segment instead of reusable ones. As a result, providers’ solution libraries are often less extensive, and the solutions available typically need to be more customised and cannot be used immediately.

Another key feature of this segment is the strong need for automation solutions, since the number of interactions with the respective end customer is usually very high. This is why most of the leading providers in this segment have powerful automation solutions.
Furthermore, there are several providers of Salesforce-based solutions in this segment that do not originate in the IT area. Instead, they come from the marketing department themselves and act as marketing agencies, so the Salesforce implementation complements their general portfolio.

The following providers have qualified as leaders in this segment: Appirio (a Wipro company), Bluewolf (an IBM company), Deutsche Telekom, Factory42, and Mindtree.

- **Appirio** has deep Salesforce know-how also for the Marketing Cloud. In its market position, the company benefits significantly from the strong position of the parent company Wipro in the German market.

- **Bluewolf** has particularly extensive expertise in implementing the Marketing Cloud, and the company has quite extensive certifications from Salesforce for this area.

- **Deutsche Telekom** focusses strongly on the medium-sized customer segment and offers them a particularly comprehensive portfolio of design and implementation services. As a company with a strong foothold in the field of multimedia solutions, Deutsche Telekom is particularly qualified in the area of the marketing cloud.

- **Factory42** can point to particularly extensive expertise in the use of CRM in media companies. The company also has numerous Salesforce-certified resources in this area.

- **Mindtree** has a particularly powerful pre-configured solution package for the design of the customer experience and can also benefit from the presence of the parent company Mindtree in the market position.
Mindtree is a Salesforce provider of consulting and implementation services based in Minneapolis, USA. The company has broad expertise for all Salesforce products in various industries, is a Platinum Partner of Salesforce and has over 350 employees with Salesforce certifications. The company has been part of the Mindtree Group since 2016.

**Range of preconfigured solutions:** The Mindtree portfolio includes a number of industry solutions, including for the consumer goods industry, manufacturing industry, financial industry and healthcare, where Patient Engage is a comprehensive solution for patient management. Special mention should be given to Connected Manufacturing, which, based on the Service Cloud, provides a powerful package for the manufacturing industry with linking of IoT elements. The corresponding Salesforce Starter Package from Mindtree is also relevant in the context of IoT.

**Methods:** Mindtree brings a comprehensive and well-developed methodology for efficient processing to the respective projects. This includes tools for code analysis, optimisation of organisational structures, risk-based testing, etc. In the projects, special attention is paid to the initial phases, where suitable methods for strategy development and development of implementation plans are available with Fast Forward. Also, the establishment of governance structures receives special attention.

**Digital platform for the customer experience:** With ConsumerConnect360, Mindtree offers a scalable and immediately usable platform that enables direct customer communication and extensive interaction with the customer. This platform combines functions of sales, service and marketing cloud into a seamlessly interlocking multi-cloud solution, including the management of individual customer cases, self-service for the customer and powerful search mechanisms for direct use by the customer.

**Special focus on data quality:** In the Mindtree project methodology, taking measures to ensure data quality consumes a lot of space. The measurement of the data quality is used as an indicator of the process quality, which is a remarkable approach with regard to quality assurance in the project.
ENTERPRISE CONTEXT

Salesforce Managed Application Services

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

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

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

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

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

Security and data professionals should read this report to understand how the providers comply with the data privacy requirements in the country such as the General Data Protection Regulation (GDPR) and security constraints in their Salesforce managed application services practices.

Procurement professionals should read this report to understand how the providers differ in their approach to Salesforce managed application services in Germany. The report also covers differences in provider experience in terms of support for Salesforce applications, nature of customer base and industry relations.
The “Managed Application Services” quadrant refers to the ability of providers to offer so-called managed services for maintenance and support functions, including monitoring, remote support, centralized management of Salesforce applications, ensuring data quality, management of data security and compliance-related aspects.
Managed application services have also become an important part of provider portfolios in the area of cloud-based applications, since companies concentrate their own resources and their in-depth knowledge of the company's processes primarily on the projects (the change business) instead of supporting the current ones (the running business). Therefore, they often rely on service providers to take over this part.

- Operational stability and incident management, which are, among other things, part of the Managed Application Services, usually do not only have to consider the respective application, but also the connection to other systems. This usually requires additional knowledge of the connected systems, which gives major system integrators a competitive advantage in this segment over providers, who focus primarily or even exclusively on Salesforce. Another important feature for managed application services is the high priority that customers attach...
To the cost level of managed services. For this reason, the current global delivery models of system integrators offer them another advantage. As a result, most of the leading providers in this segment belong to this category, although medium-sized providers with primarily onshore service provision also offer qualified managed services.

- However, proximity to the customer remains an important factor for a strong market position, since various aspects of managed services, such as user training or problem solving through workarounds, require interaction with the respective user. The leading companies usually have a significant local presence.

- Another critical success factor for the provision of managed services as cost-effectively as possible is the ability to automate repetitive functions such as monitoring, user support and performance optimisation.

The following providers have qualified as leaders in this segment: Accenture, Appirio (a Wipro company), Capgemini, Cognizant, Deutsche Telekom, HCL, Infosys, Mindtree, Persistent and Tata Consultancy Services (TCS).

- In this segment, Accenture benefits from its exceptionally large resource base combined with a powerful global delivery model. In addition, the broad functional and industry know-how gives the company convincing skills to provide managed services in the context of the complex system landscapes of globally operating companies.

- Appirio offers a variety of powerful tools to support application management. In combination with the differentiated and very flexible support model Thrive, the company qualifies as a highly competent provider of managed application services.

- With its powerful standard solution for application management called ADMNext, Capgemini has a convincing basis for the provision of managed application services in this segment. This is supplemented by various process-related services, which are offered in the form of Business Process-as-a-Service (BPaaS).
Cognizant can look back on many years of cooperation with Salesforce in the provision of managed services for the respective end customers. The portfolio also includes a variety of powerful application management tools, with which Cognizant can provide an extremely efficient operational support.

Deutsche Telekom is currently the only company in Europe to offer the reselling of Salesforce licenses with project implementation and subsequent operation as a combined full-service offering. The company also has its own Salesforce-related training academy.

HCL offers a comprehensive set of highly scalable and flexible services, especially in the Salesforce area, which are supported by an equally scalable agile methodology. Also noteworthy is the strong focus on data quality as a reliable basis for efficient system operation.

With a comprehensive suite of tools to support application management and a powerful global delivery model, Infosys offers a compelling portfolio of managed services for Salesforce that meets the needs of global customers very well.

Mindtree offers a balanced delivery model in combination with the strong emphasis on suitable governance structures and the importance of data quality. Both aspects contribute to the qualification of the provider.

In addition to a high-performance delivery model with significant near-shore and offshore presence, TCS attaches great importance to customer proximity and continuously increases its onshore presence for this purpose. The company has a broad portfolio of application management tools as well as numerous automation solutions that enable the extremely cost-effective provision of managed services.
MINDTREE

Overview

Mindtree is a Salesforce provider of consulting and implementation services based in Minneapolis, USA. The company has broad expertise for all Salesforce products in various industries, is a Platinum Partner of Salesforce and has over 350 employees with Salesforce certifications. The company has been part of the Mindtree Group since 2016.

Strengths

**Convincing methodology:** Mindtree has a number of efficiency-enhancing tools that can be used both in project execution and to support the operation of Salesforce applications. This includes, for example, code analysis, optimisation of organisational structures, tools for risk-based testing, etc.

**Consistent governance:** The organisational framework essential for the efficient and stable operation of applications in the form of a governance model for controlling further development and requirements management over the entire lifecycle of the application receives a lot of attention in the Mindtree methodology. One example is the consistent use of the quarterly reviews with the customer for analysing ongoing projects, checking the stability of operations and agreeing measures for continuous improvement.

**Focus on data quality:** Mindtree attaches great importance to data quality to ensure stable and efficient operation of applications, which is also reflected in the methodology, for example, by treating the determination of data-oriented indicators as part of measuring the quality of business processes.

Caution

The approach of Mindtree of continuous further development during operation, which is widely used in application management, should be supplemented by a more version-oriented approach for companies with corresponding requirements (e.g., healthcare).

The onshore presence especially in the DACH region should be expanded, in order to increase customer proximity accordingly.

2020 ISG Provider Lens™ Leader

Mindtree is a powerful provider of managed application services for Salesforce-based applications with a strong focus on mission-critical governance.
Methodology
METHODOLOGY

The research study “ISG Provider Lens™ 2019-20 – Salesforce Ecosystem Partners” analyzes the relevant software vendors/service providers in the Germany market, based on a multi-phased research and analysis process. It positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Salesforce Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG’s internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements
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Mr. Suletzki relies on a deep understanding of core business processes and in-depth know-how of IT management. He has more than 30 years of experience as Senior IT Manager, Senior Project Manager and – at the beginning of his career – as IT consultant. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution.

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