Salesforce Ecosystem Partners

U.S. 2021

Quadrant Report

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

March 2021

Customized report courtesy of:

Mindtree
ISG Provider Lens™ Quadrant Report | March 2021

About this Report

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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 2021 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 of this report is Rainer Suletzki and the editors are Ambrosia Sabrina, Ipshita Sengupta and Sajina B. The Research Analyst is Rahul Basu and Data Analyst is Rajesh Chilappagari and Quality & Consistency Advisor are Aasheesh Mittal, Jenn Stein and Yadu Singh.

© 2021 Information Services Group, Inc. All Rights Reserved.
1 Executive Summary
3 Introduction
14 Implementation and Integration Services for Large Enterprises
19 Implementation Services for Core Clouds Midmarket
23 Implementation Services for Marketing Cloud Midmarket
27 Managed Application Services for Large Enterprises
32 Managed Application Services for Midmarket
34 Methodology

© 2021 Information Services Group, Inc. All Rights Reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG’s judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.
EXECUTIVE SUMMARY

Strong Growth Of The Market For Salesforce-Related Services With Ongoing Consolidation Of The Provider Landscape

Since the company was founded in 1999, Salesforce has been experiencing significant growth and is currently the world's leading provider of cloud-based, software-as-a-service (SaaS) customer relationship management (CRM). From the outset, the company has been focusing on agile methodologies and a high level of standardization, which, in turn, compels it to issue frequent application updates. This helps clients conduct rapid implementations, starting with limited functional scope and then enhancing these implementations. Simultaneously, Salesforce is continuously expanding its product portfolio and has recently focused on industry-specific products such as Financial Services Cloud and Health Cloud. Most recently, Salesforce intensified its efforts on this path toward industry solutions by acquiring Vlocity, which used to be an independent software vendor (ISV) that developed industry-specific software products based on the Salesforce platform. The common opinion in the market is that Vlocity will be the future nucleus for the development of industry clouds within Salesforce.

In December 2020, Salesforce announced the acquisition of Acumen Solutions, a company that has been successful as a service provider for the implementation of Salesforce solutions, primarily in the U.S. It remains to be seen if this move means Salesforce is growing its footprint in the market for services around Salesforce implementations on behalf of clients, or if there are other reasons for this acquisition. As this was announced only late last year, the intention is not clear yet.

The need for support by external providers is continuously growing at a high rate due to the implementation of various products for Salesforce clients. Salesforce has shown a significant increase in license revenue over the recent twelve months, since the last Provider Lens study for this topic was published, and this indicates a similarly growing demand for implementation resources that clients still do not have in house. This has been putting additional momentum to the ongoing consolidation of providers in this market, as the supply of implementation capacities lags the strong demand, and global system integrators with the appropriate financial capabilities continue to take over midsize providers to grow the resource base in terms of size and scope being covered. This holds true especially for the U.S., where numerous boutique providers were subject to acquisitions by system integrators.

Considering the implementation methodologies being applied, the hybrid Agile model is now the most common approach for large enterprise clients that need to integrate Salesforce into a sophisticated landscape with global operation. This model is a combination of Agile elements for implementation and phase-oriented elements for strategy, design and rollout. Most providers offer this type of methodology within their portfolio. For isolated implementation, the pure Agile methodology is still suitable and is applied primarily for midsize clients without the need for a global rollout and with only limited integration requirements. Meanwhile, the dominant technology for the integration
aspects of Salesforce is definitely the Mulesoft platform, which has been a part of the Salesforce portfolio for a few years. Service providers clearly have to offer considerable Mulesoft capabilities, and the large system integrators often operate a dedicated Mulesoft practice of significant size for all integration activities around Salesforce.

A strong network of partnerships with ISVs in the Salesforce ecosystem remains very important for all providers including both system integrators and boutique providers. Their solutions are usually offered as independent products with separate licensing models that need to be considered when assessing the potential costs of a Salesforce-based application. Salesforce runs a specific web-based store for these solutions, namely AppExchange Store, which provides comprehensive information about ISVs and their products (usually called apps). Salesforce ensures that the apps meet basic software quality measures, maintenance cycles and compatibility with Salesforce products, among other requirements.

The structure of this year’s study has slightly changed from last year’s to better distinguish between the requirements of large enterprise clients with a global operation and midsize clients that often operate only in one region and do not have major integration needs. We now have two segments for large enterprise clients and three segments for the midmarket. In both groups, a clear distinction is made between the Change Business (implementation services) and the Run Business (managed application services). Therefore, the providers are classified in a distinct way, allocated either to the large enterprise market or to the midmarket. For a few providers, this distinction could not be made unambiguously, so they appear in both groups.
Introduction

The Salesforce Ecosystem study examines various offerings around the Salesforce platform, where a basic distinction is made between implementation services (the Change Business) and managed application services focusing on operational support for productive applications (the Run Business). In both of these basic segments, a further distinction is made between large enterprise clients and the midmarket due to the significantly higher need for Salesforce integration into the complex application landscapes of large enterprise clients. Furthermore, these clients primarily have globally operating businesses that require corresponding delivery capabilities from the service providers.

Definition

Implementation and Integration Services for Large Enterprises

Implementation Services for Core Clouds Midmarket

Implementation Services for Marketing Cloud Midmarket

Managed Application Services for Large Enterprises

Managed Application Services for Midmarket

Source: ISG 2021
Definition (cont.)

Scope of the Report

As part of the ISG Provider Lens™ Quadrant Study, we are introducing the following five segments on the Salesforce Ecosystem.

Scope of the Study – Quadrant and Geography Coverage

<table>
<thead>
<tr>
<th>Segment</th>
<th>U.S.</th>
<th>Germany</th>
<th>Brazil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementation &amp; Integration Services for Large Enterprises</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Implementation Services for Core Clouds Midmarket</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Implementation Services for Marketing Cloud Midmarket</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Managed Application Services for Large Enterprises</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Managed Application Services for Midmarket</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Provider Classifications

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

- **Midmarket**: Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts**: Multinational companies with more than 5,000 employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.
Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and 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 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 fall 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 therefore have some potential to optimize their portfolio and increase their attractiveness.

**Contender**
Contenders still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.
Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star
Companies that receive the Rising Star award have a promising portfolio or the market experience to become a leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

Not In
The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.
<table>
<thead>
<tr>
<th>Implementation &amp; Integration Services for Large Enterprises</th>
<th>Implementation Services for Core Clouds Midmarket</th>
<th>Implementation Services for Marketing Cloud Midmarket</th>
<th>Managed Application Services for Large Enterprises</th>
<th>Managed Application Services for Midmarket</th>
</tr>
</thead>
<tbody>
<tr>
<td>7Summits</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Accenture</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Acumen</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>AllCloud</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Market Challenger</td>
</tr>
<tr>
<td>Atos</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
</tr>
<tr>
<td>Birlasoft</td>
<td>Not In</td>
<td>Rising Star</td>
<td>Not In</td>
<td>Leader</td>
</tr>
<tr>
<td>Brillio</td>
<td>Not In</td>
<td>Rising Star</td>
<td>Product Challenger</td>
<td>Not In</td>
</tr>
<tr>
<td>Capgemini</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
</tr>
<tr>
<td>CGI</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Coastal Cloud</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Cognizant</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
</tr>
<tr>
<td>Customertimes</td>
<td>Rising Star</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
</tr>
<tr>
<td>Deloitte</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>EPAM</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
<td>Contender</td>
</tr>
</tbody>
</table>
### Salesforce Ecosystem Partners - Quadrant Provider Listing 2 of 3

<table>
<thead>
<tr>
<th>Provider</th>
<th>Implementation &amp; Integration Services for Large Enterprises</th>
<th>Implementation Services for Core Clouds Midmarket</th>
<th>Implementation Services for Marketing Cloud Midmarket</th>
<th>Managed Application Services for Large Enterprises</th>
<th>Managed Application Services for Midmarket</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fujitsu</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
<td>Market Challenger</td>
<td>Not In</td>
</tr>
<tr>
<td>HCL</td>
<td>Rising Star</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
</tr>
<tr>
<td>Hexaware</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
</tr>
<tr>
<td>Huron</td>
<td>Not In</td>
<td>Market Challenger</td>
<td>Market Challenger</td>
<td>Not In</td>
<td>Market Challenger</td>
</tr>
<tr>
<td>IBM</td>
<td>Market Challenger</td>
<td>Not In</td>
<td>Not In</td>
<td>Market Challenger</td>
<td>Not In</td>
</tr>
<tr>
<td>Infosys</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
</tr>
<tr>
<td>Isobar</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>LTI</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
</tr>
<tr>
<td>Mindtree</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
</tr>
<tr>
<td>Marlabs</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Contender</td>
<td>Not In</td>
<td>Product Challenger</td>
</tr>
<tr>
<td>Mphasis</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
<td>Contender</td>
</tr>
<tr>
<td>NTT DATA</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
</tr>
<tr>
<td>Perficient</td>
<td>Not In</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
</tr>
<tr>
<td>Persistent</td>
<td>Product Challenger</td>
<td>Leader</td>
<td>Leader</td>
<td>Not In</td>
<td>Leader</td>
</tr>
</tbody>
</table>

© 2021 Information Services Group, Inc. All Rights Reserved.
### Salesforce Ecosystem Partners - Quadrant Provider Listing 3 of 3

<table>
<thead>
<tr>
<th>Implementation &amp; Integration Services for Large Enterprises</th>
<th>Implementation Services for Core Clouds Midmarket</th>
<th>Implementation Services for Marketing Cloud Midmarket</th>
<th>Managed Application Services for Large Enterprises</th>
<th>Managed Application Services for Midmarket</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polsource</td>
<td><img src="chart" alt="Leader" /></td>
<td><img src="chart" alt="Leader" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Product Challenger" /></td>
</tr>
<tr>
<td>PwC</td>
<td><img src="chart" alt="Leader" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Not In" /></td>
</tr>
<tr>
<td>Silverline</td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Product Challenger" /></td>
<td><img src="chart" alt="Product Challenger" /></td>
<td><img src="chart" alt="Not In" /></td>
</tr>
<tr>
<td>Slalom</td>
<td><img src="chart" alt="Product Challenger" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Leader" /></td>
<td><img src="chart" alt="Product Challenger" /></td>
</tr>
<tr>
<td>SLK Group</td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Contender" /></td>
<td><img src="chart" alt="Contender" /></td>
<td><img src="chart" alt="Product Challenger" /></td>
</tr>
<tr>
<td>Tavant</td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Product Challenger" /></td>
<td><img src="chart" alt="Contender" /></td>
<td><img src="chart" alt="Product Challenger" /></td>
</tr>
<tr>
<td>TCS</td>
<td><img src="chart" alt="Leader" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Leader" /></td>
</tr>
<tr>
<td>Traction on Demand</td>
<td><img src="chart" alt="Product Challenger" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Rising Star" /></td>
</tr>
<tr>
<td>Tech Mahindra</td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Rising Star" /></td>
<td><img src="chart" alt="Not In" /></td>
</tr>
<tr>
<td>Visionet</td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Leader" /></td>
<td><img src="chart" alt="Leader" /></td>
<td><img src="chart" alt="Market Challenger" /></td>
</tr>
<tr>
<td>Wipro</td>
<td><img src="chart" alt="Leader" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Leader" /></td>
</tr>
<tr>
<td>Zensar</td>
<td><img src="chart" alt="Not In" /></td>
<td><img src="chart" alt="Market Challenger" /></td>
<td><img src="chart" alt="Market Challenger" /></td>
<td><img src="chart" alt="Product Challenger" /></td>
</tr>
</tbody>
</table>
Salesforce Ecosystem Partners Quadrants
There has been a growing demand among enterprise clients in the U.S. for implementation resources and corresponding support. This has triggered consolidation among service providers, because implementation capabilities lag behind the strong demand.

In the U.S., which is a mature Salesforce market compared with other countries/regions, the complexity of an enterprise’s underlying application landscape is proportional to its size. The hybrid Agile model is now the most common approach for global deployments, whereas the pure Agile methodology is suitable for a single implementation of Salesforce. As a result, in most cases, large enterprises prefer providers that have strong integration capabilities and are operating on a global scale on their own without having to rely on partners.

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them effectively implement Salesforce Marketing and Sales clouds and Heroku, among others, with the necessary integrations to related systems and analysis solutions.
Field services managers should read this report to understand how service providers implement and expand the uses of the Salesforce Service Cloud to better manage field service operations.

IT and technology leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively adopt services from Salesforce clouds, integrations and analysis solutions. The report also shows them how the technical capabilities of the service providers in the market can be compared.

Security and data professionals should read this report to understand how providers comply with the security and data protection laws in the U.S. for their Salesforce implementation and integration practices and how they can be compared with one another.
IMPLEMENTATION AND INTEGRATION SERVICES FOR LARGE ENTERPRISES

Definition

This quadrant includes providers of implementation services for Salesforce applications and the integration of these applications with other major standard software solutions that are usually part of the complex system landscape of large and globally operating enterprise clients. These clients in most cases use various cloud products of the entire Salesforce portfolio, and the providers, therefore, need to offer strong capabilities across the portfolio. The respective services include consulting, configuring and implementing applications for a client, integration within a customer’s system landscape, data migration and go-live support.

Source: ISG Research 2021
Observations

The following providers achieve a leader position in this quadrant:

- **Accenture** clearly has one of the largest Salesforce practices globally and can refer to a powerful solutions library and a strong market position in the U.S., considering the workforce as well as the scope of the portfolio.

- **Capgemini** relies upon longstanding experience in CRM solutions in general and Salesforce in particular. Broad expertise in various industries and powerful tool support contribute to a strong market position regarding Salesforce.

- **Cognizant**, with a large portfolio of predefined solutions and a global delivery model, has achieved a rather strong position in the market for Salesforce in the U.S. and continues to grow organically as well as by acquisitions.

Eligibility Criteria

The following evaluation criteria apply to this quadrant:

- Technology competency
- Delivery capabilities
- Use cases
- Unique differentiators
- Economic stability
- Market position
- Predefined solutions, accelerators and templates
- Partnerships
Deloitte, in its digital practice, focuses to a large extent on cloud-based solutions and their implementations and has invested significantly in Salesforce-related capabilities. In addition, it has deep business process expertise, resulting in a leader position in this segment.

Infosys has a strong portfolio with numerous predefined solutions and compelling productivity tools. It has substantiated its leading position in early 2020 by the acquisition of the midsize Salesforce provider Simplus, which adds significantly to Infosys’ capabilities in the U.S.

Mindtree, based on a focus on multi-cloud implementations and a strong methodology serving the needs of various types of clients, has continuously developed its portfolio of predefined solutions and is a leading partner for Salesforce implementations.

PwC benefits from its deep business process expertise and combines this in a compelling manner with a rich set of industry-specific solutions based on the Salesforce platform.

TCS offers a very strong Salesforce implementation portfolio mainly for large enterprise customers, based upon a strong project methodology and a compelling global delivery model.

Wipro has a strong combination of functional and industry-oriented expertise on a global scale and has improved its position in recent years with several acquisitions, such as Appirio in the U.S., which are currently maintained as separate brands under the Wipro parent organization.

The following providers qualify as Rising Stars in this quadrant and exhibit the potential to achieve a leader position in future:

Customertimes combines deep verticals expertise with comprehensive integration capabilities and is, therefore, a good choice for large enterprises as a Salesforce implementation partner.

HCL has a strong record in CRM implementation in general and particularly for Salesforce. Continuous investments in strong methodology and the workforce helped HCL significantly improve its position as an implementation partner for Salesforce.
Overview

As Mindtree’s Salesforce practice, Mindtree brings 14 years of Salesforce expertise into the Mindtree portfolio. Mindtree has recently been taken over by the Larsen & Toubro Group. Mindtree focuses only on Salesforce and exhibits strong expertise across all the respective products and various industries. The company is headquartered in Minneapolis and has other U.S. locations in New York, Chicago and Los Angeles. The company has approximately 500 Salesforce-related resources primarily based in the U.S., and most of them carry Salesforce certifications.

Strengths

**Strong methodology:** The methodology that Mindtree 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-based testing and others. Mindtree strongly focuses 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.

**Focus on multi-cloud implementations:** Salesforce implementations for large enterprise customers in most cases require the use of several products beyond sales and service cloud. Consequently, Mindtree pays close attention to this type of implementation project and offers predefined solutions in this context. A good example is the ConsumerConnect 360 solution, where Mindtree offers a scalable and out-of-the-box digital experience platform that can be used to directly engage with end consumers. It combines the capabilities of sales, service and Marketing Cloud into a multi-cloud solution accelerator. Among its various features are customer case management, customer self-service and a strong community search for specified solutions.

**Back-end integration capabilities:** The comprehensive integration capabilities with more than 200 Mulesoft developers are complemented by the deep expertise for common endpoint solutions that Salesforce usually needs to be connected with (for example, SAP).

Caution

Mindtree should complement its industry-specific expertise by including some key industries; for example, life sciences.

Nearshore delivery, combining customer proximity with opportunities for cost reduction, should be considered to further strengthen the delivery model.
Salesforce implementation capabilities lags behind the strong demand from enterprise clients. This triggers consolidations in the market, with large system integrators acquiring midsize providers to leverage the latter’s established brand presence and strengthen their positions in the market.

**Marketing and sales leaders** should read this report to understand the relative positioning and capabilities of service partners that can help them effectively implement Salesforce Sales and Commerce Cloud products, including highlighting how service providers deliver industry-specific 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 adopt Salesforce Sales, Service and Commerce Cloud products and how the providers in the market can be compared in terms of their technical capabilities and development methodologies.

**Security and data professionals** should read this report to understand how the providers meet the data protection and security requirements in the U.S. for their Salesforce implementation and integration practices. The report also highlights the providers’ focus on data quality and how they can be compared with one another.
IMPLEMENTATION SERVICES FOR CORE CLOUDS MIDMARKET

Definition

This quadrant addresses providers that specialize in Salesforce Sales, Service and Commerce Cloud. These products are broadly considered as core clouds of Salesforce. These providers mainly take an Agile approach to implementation and focus on cases where less integration is required, which is typical for midsize and small clients. An important aspect of the services they offer is consulting on the redesign of processes while using Salesforce applications.

Source: ISG Research 2021
Eligibility Criteria

The following evaluation criteria apply to this quadrant:

- Technology competency
- Delivery capabilities
- Use cases
- Unique differentiators
- Economic stability
- Market position
- Predefined solutions, accelerators and templates
- Partnerships

Observations

The following providers achieve a leader position in this quadrant:

- **7Summits** has based its portfolio on a unique approach using Community Cloud as the primary system of engagement. The company can further refer to powerful solution accelerators and deep expertise in various verticals.

- **Acumen Solutions’** portfolio focuses on functionalities related to any type of customer interaction and combines this with strong automation capabilities and verticals expertise. Acumen was most recently taken over by Salesforce.

- **Coastal Cloud** applies a well-defined Agile methodology for multi-cloud implementations of Salesforce. In combination with strong industry expertise and focus on data quality, Coastal Cloud is an excellent Salesforce solution provider for customers in the U.S.
Hexaware’s portfolio highly emphasizes industry-specific cloud products of Salesforce with powerful predefined solutions and can also refer to its integration capabilities using the Mulesoft platform.

Persistent Systems follows a strongly modular approach where all solutions are designed and developed so they can easily be connected. The deep development expertise relies on a data-oriented approach based on a well-defined foundation layer of API and data integration.

PolSource offers a delivery approach that is based on a strong center of excellence (CoE) and can refer to a deep expertise for various industries where the provider uses a rich set of industry-specific accelerators.

Traction on Demand is an excellent partner for digital transformation based on Salesforce, with compelling strategy and design capabilities, and mainly emphasizes client enablement during the entire project.

The following providers are positioned as Rising Stars in this quadrant and exhibit the potential to achieve a leader position in the future:

- Birlasoft has evolved as a competent partner for Salesforce implementations due to its several powerful predefined solutions and enhanced integration capabilities for back-end systems.
- Brillio is a good choice as a Salesforce implementation partner owing to its sophisticated methodology, which combines design-thinking techniques, powerful tool support for assessing the quality of a Salesforce application and a focus on mobile enablement.
In the U.S., the focus of Salesforce implementation services for Marketing Cloud is on enhancing CX. ISG research shows a preference for custom solutions rather than ones with reusable components. This means that service providers rely on development more than component libraries to help deliver Marketing Cloud implementations. Also, since marketing functions involve many customer and prospect transactions, a provider’s automation capabilities are important.

The clients are looking to create two-way engagements to deliver the best solution for individual dynamics, personalize interaction by leveraging Salesforce Einstein AI capabilities and analyze end-to-end marketing effectiveness across all digital channels and devices. The expectation is to enable organizations to act on those insights and deliver data-driven personalized experiences across every stage of a customer relationship.

Marketing leaders should read this report to understand the relative positioning and capabilities of service partners that can help them implement Salesforce Marketing Cloud products effectively. The report 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 will also enable them to compare the technical capabilities, automation depth and development methodologies of the providers.
IMPLEMENTATION SERVICES FOR MARKETING CLOUD MIDMARKET

Definition

This quadrant addresses providers that specialize in Salesforce Marketing Cloud for cases where the need for real-time integration into a complex system landscape is limited, which is more typical for midsize and small clients. In addition, providers included in this quadrant need expertise in general aspects, deep knowledge of marketing-specific aspects such as the use of media, and multi-channel approaches to information gathering, customer experience, and digital customer journey optimization.
Eligibility Criteria

The following evaluation criteria apply to this quadrant:

- Technology competency
- Delivery capabilities
- Use cases
- Unique differentiators
- Economic stability
- Market position
- Predefined solutions, accelerators and templates
- Partnerships

Observations

The following providers achieve leader position in this quadrant:

- **Acumen Solutions** exhibits a strong focus on the Salesforce Marketing Cloud, combined with powerful automation mechanisms, and is a highly capable partner for the marketing function of its clients. Acumen Solutions was most recently taken over by Salesforce.

- **Coastal Cloud**, with a large Marketing Cloud practice and strong automation capabilities, is an excellent implementation partner for the Marketing Cloud and has a high level of specialization and certification in this context.

- **Isobar** offers a full-service package for the Marketing Cloud, comprising strategy and consulting, configuration and custom development. Hence, Isobar is a highly capable provider of implementation services around the Salesforce Marketing Cloud with deep domain expertise.

- **Persistent Systems**' large Marketing Cloud practice combines broad domain expertise with deep technology knowledge. With the additional strong focus on marketing-related customer analytics, the company is an excellent partner in this segment.
Observations (cont.)

- **PolSource** applies an implementation approach that strongly considers marketing specifics such as customer experience and is a highly reliable partner for the implementation of the Salesforce Marketing Cloud.

- **Slalom** has broad marketing-specific expertise in areas such as customer experience strategy and omnichannel commerce. With its Build-as-a-Service approach, Slalom offers an innovative way of crafting custom-built technology products.

- **Traction on Demand** offers various powerful predefined solutions in the context of marketing and increasingly focuses on achieving a high level of automation. Its specific focus is on enabling the client organization.
ENTERPRISE CONTEXT

Managed Application Services for Large Enterprises

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

In this quadrant report, ISG defines the current market positions of providers of Salesforce managed application services for large enterprises in the U.S. Traditional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring. This study covers providers offering additional services, including administrative assistance, accelerators for development and utilization, development services, proactive monitoring and advisory services. In order to ably manage their Salesforce environments, enterprise clients look for service providers that can keep IT costs under control and maintain the platform efficiently. Enterprises need service providers to manage the application, licenses and upgrades and to provide user support and develop business applications integrated with the Salesforce environment.

ISG notes that proximity to the enterprise workforce is an important factor in the market positioning of providers, since several aspects of managed application services, such as user training and resolution of issues by workaround, require direct and immediate interaction with the user. Service providers are helping enterprise clients by providing cost management for the application, planning upgrades, conducting regular trainings and expanding the use of Salesforce within an organization. Large enterprises headquartered in the U.S. that have global operations can leverage global providers to support deployments in the U.S. and in other parts of the world. All service providers must aim for high levels of user satisfaction to sustain or encourage the use of Salesforce applications and justify the investments in Salesforce managed services.

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

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

Security and data professionals should read this report to understand how the providers comply with data privacy and security requirements in the U.S. in their Salesforce managed application service practices.

Procurement professionals should read this report to understand how the providers differ in their approach to Salesforce managed application services in the U.S. The report covers differences in experience in terms of Salesforce applications, nature of customer base and industry relations.
MANAGED APPLICATION SERVICES FOR LARGE ENTERPRISES

Definition

This quadrant includes providers with the capability to offer managed services for maintenance and support functions that include monitoring, remote support, centralized management of Salesforce applications, data quality management, data security and compliance-related aspects. In the case of large enterprise clients, this usually includes the capability to provide these services in the context of global reach and complex application landscapes, comprising a variety of solutions from different software providers.
Eligibility Criteria

The following evaluation criteria apply to this quadrant:

- Technology competency
- Delivery capabilities
- Use cases
- Unique differentiators
- Economic stability
- Market position
- Maturity of delivery and contract models
- Experience with support for Salesforce-based applications
- Broad customer base

Observations

The following providers achieve leader position in this quadrant:

- **Accenture** is an excellent partner for the management of Salesforce-based solutions, with deep functional knowledge, comprehensive technological expertise and a global delivery model that includes offshore, onshore and nearshore resources.

- **Capgemini's** portfolio includes powerful solutions enabling proactive application management with a high level of automation, which makes the provider a highly capable partner for managing Salesforce applications.

- **Cognizant** offers a compelling portfolio of managed application services for large enterprise customers using powerful tooling and a global delivery model. Furthermore, it supports the client's business functions.

- **HCL** has become a leading provider of managed application services for Salesforce due to its scalable Agile methodology, sophisticated test support and mature delivery model.
Infosys offers a variety of tools supporting efficient application management and pays close attention to the use of automation to achieve good business process stability and cost-effectiveness.

L&T Infotech benefits in managing Salesforce applications from the company's experience in conducting implementations for sophisticated system landscapes. The provider operates a dedicated tool for master data management (MDM) to achieve a single source of truth in a Salesforce environment.

Mindtree applies a strong application management methodology, with a focus on optimization, that uses a variety of productivity-enhancing solutions. The provider strongly focuses on appropriate governance and high data quality.

TCS can refer to broad application management expertise combined with strong Salesforce technology capabilities and exhibits a remarkable focus on efficiency and automation.

Wipro uses various tools for increasing efficiency in application management as well as a unique solution to measure and ensure the business value being generated by a Salesforce application.

The following provider is a Rising Star in this quadrant and exhibits the potential to achieve Leader status in the future:

Tech Mahindra is a good choice as partner for the management of Salesforce applications, owing to its highly standardized and cost-effective managed application model and strong methodology.
As Mindtree's Salesforce practice, Mindtree brings 14 years of Salesforce expertise into the Mindtree portfolio. Mindtree focuses only on Salesforce and exhibits strong expertise across all the respective products and various industries. The company is headquartered in Minneapolis and has other U.S. locations in New York, Chicago, and Los Angeles. The company has approximately 500 Salesforce-related resources primarily based in the U.S., and most of them carry Salesforce certifications.

**Strong application management methodology with focus on optimization:** Mindtree uses a variety of productivity-enhancing solutions to support specific activities in the management of Salesforce applications. They include the following: the Mindtree CAPE™ platform for intelligent data management, data operations with setup of instrumentation, execution of 24x7 operations, and setup of programmable bots across various data layers. A specific focus is on the test activities, where Mindtree offers a Risk-Based Testing (RBT) framework for critical user requirements and an automation framework for increased test coverage and traceability. Furthermore, it offers a powerful tool for continuous monitoring of the quality of business processes in the form of metrics-driven test management.

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

**Attention to data quality:** Data management gets high attention in Mindtree's project methodology, which includes measuring data quality as part of the business performance assessment. This approach ensures quality results for an implementation project.

Mindtree is a highly capable provider of application management for Salesforce applications with a strong focus on process optimization.
ENTERPRISE CONTEXT

Managed Application Services for Midmarket

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

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

In order to ably manage their Salesforce environment, clients look for service providers that can keep IT costs under control and maintain the platform efficiently. Enterprises need service providers to manage the application, licenses and upgrades and to provide user support and develop business applications integrated with the Salesforce environment.

ISG notes that service providers are helping their clients by providing cost management for the application, planning upgrades, conducting regular trainings and expanding the use of Salesforce within an organization.

The midmarket in the U.S. can leverage the midsize providers, as they are easier to negotiate with and are gaining a considerable number of midmarket clients because of their prices and proximity to a client's site of operation. Clients that seek onshore managed services have the option of soliciting the services of any qualified midsize service provider.

All service providers must aim for high user satisfaction to sustain or encourage the use of Salesforce applications and justify the investments in Salesforce managed services.

Marketing, sales and field services leaders should read this report to understand the relative positioning and capabilities of service partners that can help to implement Salesforce managed application services effectively. The report also highlights the advanced managed 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 of managed services. The report also compares the technical capabilities of these providers in areas such as remote and onsite monitoring, technology accelerators, incident response, automation and development methodologies.

Security and data professionals should read this report to understand how the providers comply with data privacy and security requirements in the U.S. in their Salesforce managed application service practices.

Procurement professionals should read this report to understand how the providers differ in their approach to Salesforce managed application services in the U.S. The report covers differences in experience in terms of Salesforce applications, nature of customer base and industry relations.
MANAGED APPLICATION SERVICES FOR MIDMARKET

Definition

The scope of this quadrant is similar to the one for large enterprise clients, where it includes providers with the capability to offer managed services for maintenance and support functions that include monitoring, remote support, centralized management of Salesforce applications, data quality management, data security and compliance-related aspects. The basic difference arises from the usually lower integration needs, and, in many cases, from a more regional focus of midmarket clients.
Eligibility Criteria

The following evaluation criteria apply to this quadrant:

- Technology competency
- Delivery capabilities
- Use cases
- Unique differentiators
- Economic stability
- Market position
- Maturity of delivery and contract models
- Experience with support for Salesforce-based applications
- Broad customer base

Observations

The following providers achieve leader position in this quadrant:

- **Birlasoft** offers a comprehensive and compelling portfolio for management of Salesforce applications with the support of its own powerful tools, and increasingly it focuses on an appropriate governance model that supports, in cooperation with the client, effective system operation and maintenance of the application.

- **Brillio**'s comprehensive application management portfolio is structured along a sophisticated managed services engagement roadmap and, in combination with powerful tool support, makes Brillio an excellent choice for the management of Salesforce applications.

- **Hexaware** provides complete and outcome-based managed application services for Salesforce with a focus on automation and offers a compelling dashboard solution for service quality monitoring.

- **Persistent Systems** offers an impressive portfolio of managed application services around the Salesforce platform and can provide end-to-end services across the client's system landscape, including back-end systems.
METHODOLOGY
The research study “ISG Provider Lens™ 2021 – Salesforce Ecosystem Partners” analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Salesforce Ecosystem Partners
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
Authors and Editors

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.

Rahul Basu, Enterprise Context & Global Overview Analyst
Senior Analyst

Rahul Basu is a senior analyst in ISG and is responsible for supporting ISG Provider Lens™ studies on Social Business Collaboration and Digital Workplace Services. His area of expertise is social media management and digital marketing. During his tenure, he has developed content for ISG Provider Lens™ in the areas of social business collaboration services. He is responsible for supporting research authors and authoring blogs about niche technologies, market trends and insights.
Jan Erik Aase, Editor
Partner and Global Head - ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, Partner and Global Head - ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.
ISG (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 75 of world’s top 100 enterprises, 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. For more information, visit www.isg-one.com.