ISG Provider Lens™

Salesforce Ecosystem Partners

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

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HCL

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Since its founding in 1999, Salesforce has shown impressive growth and is now one of the leading providers of cloud-based application systems in the form of Software as a Service (SaaS). The focus was always on implementation using agile methods and a high degree of standardization, giving the company the opportunity to roll out updates at comparatively short intervals.

Salesforce has continued steady growth in recent years, and the restrictions imposed by the COVID-19 pandemic have only had a limited impact on the pace of growth. Although a few project budgets were partially frozen, or the corresponding projects were temporarily put on hold, in general the market growth was not significantly affected. In some areas, the increasing relocation of processes or sub-processes in the direction of online processing has led to additional demand for IT solutions. As Salesforce is functionally largely geared toward customer-related processes, there have been additional growth impulses for the company in these areas during the pandemic.

The high growth also leads to a growing demand for implementation services. Meanwhile, the availability of qualified resources with Salesforce expertise can be seen as a limiting factor for the number of implementations. Specifically, in the U.S., this has resulted in significant consolidation pressure in the market for corresponding services, with large system integrators in particular trying to expand their resource base by taking over other providers. As a result, the number of midsize providers that offer complete scope coverage in the U.S. has shrunken

Strong growth in demand for **Salesforce services and the resulting** challenges for the vendors.

significantly. It will be interesting to see if the few remaining providers will stay independent over the upcoming years, or if new players of this will emerge. In addition to these takeover activities, which ultimately do not generate any additional capacities in the market, many providers are focusing on increased recruiting. On the one hand, young talents are hired and trained to become Salesforce consultants through suitable qualification measures. On the other hand, within some companies, experienced consultants from other areas are requalified to become Salesforce experts. The large system integrators follow this path due to the lack of opportunities for additional growth by acquisitions. In its partnerships, Salesforce itself promotes companies that contribute significantly to additional implementation capacities.

It is worth noting here that Salesforce is also currently building up its own offering of implementation services. Following the acquisition of the midsized provider Acumen, the company is further expanding its own capacities and is also partnering with other providers to implement Salesforce for several customers. This opens additional opportunities for these providers, but also inherits the risk of growing dependence on Salesforce. Furthermore, it is not yet possible to conclusively assess how sustainable the expansion of Salesforce's own development capacities will be, because as a software business, it requires significant investments and usually has lower margins.

Another key trend is the alignment of the Salesforce offering to different industries. This started a few years ago with the launch of industry-specific products like the Financial Services Cloud and the Health Cloud. In 2020, this focus was intensified with the acquisition of Vlocity, an independent software vendor (ISV) that to date has developed various industry-specific products based on the Salesforce platform. It appears that this is a sustained trend and that Salesforce's portfolio is continually evolving toward an increased focus on industries. It remains to be seen whether this will lead to restrictions in the functional further development of such classic products as Sales and Service Cloud over the next 12 to 24 months.

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

When it comes to integrating Salesforce with other applications, the MuleSoft platform continues to be the dominant tool. Comprehensive competence with regard to this platform is now an essential requirement to be able to survive in the market for providers of Salesforce implementations. The large system integrators usually operate a dedicated MuleSoft practice of considerable size, in which the corresponding capacities are bundled.

For all vendors, whether they are systems integrators or boutique vendors, a strong network of ISV partnerships within the Salesforce ecosystem remains of great importance. There is still a significant need to cover requirements that go beyond the standardized range of functions of the Salesforce products with additional products. This applies not only to the implementation, but also to the subsequent continuous support of ongoing operations. To be able to avoid individual developments as far as possible in these cases, the products of the ISVs are used. These solutions are typically offered as independent products, licensed separately and made available through a Salesforce-powered portal called the AppExchange Store. Salesforce ensures that the individual apps meet the basic software quality requirements, including troubleshooting, maintenance cycles, compatibility with Salesforce products, etc.

In this year's study, the quadrant for implementation and integration for large customers was renamed "Multi-Cloud Implementation and Integration for Large Enterprises" to make the difference to the quadrants for the midmarket even clearer in terms of content. The definition of this quadrant remains unchanged. Furthermore, the support of global rollouts and the coverage of the complex integration requirements are key success factors for providers in this quadrant. The companies Accenture, Capgemini, Cognizant, Customertimes, Deloitte Digital, HCL, Infosys, Mindtree, TCS and Wipro qualified as Leaders this year.

The Implementation Services for Core Clouds Midmarket segment also remains unchanged in terms of content. As already explained, the trend toward consolidation has led to several players disappearing from the market in 2021. It can be stated that, in addition to pronounced development skills, the early phases of development, including strategy development, design and planning of a roadmap, have become increasingly important skills for the success of providers in this area. Birlasoft, Coastal Cloud, Hexaware, Persistent Systems, Silverline and Traction on Demand qualified as Leaders this year. As a Rising Star, Brillio has the prospect of qualifying as a leading provider in the future if its positive development continues.

In the Implementation Services for Marketing Cloud Midmarket segment, which also remains unchanged in terms of content, the following providers have qualified for a leading position this year: Coastal Cloud, Dentsu, Persistent Systems, Silverline, Slalom and Traction on Demand.

The market for Managed Application Services for Large Enterprises, like the corresponding market for implementations, is largely dominated by the large and internationally operating system integrators. Other players occupy significant sub-areas, but usually remain a bit behind the position of a Leader. Accenture, Capgemini, Cognizant, HCL, Infosys, L&T Infotech, Mindtree, TCS, Tech Mahindra and Wipro were able to qualify for this status.

Although they have favorable cost structures due to their global supplier models, the large system integrators do not play a significant role in the quadrant for Managed Application Services for Midmarket. On the one hand, this is due to the usually lower complexity of requirements in this market, and on the other hand, the companies mentioned do not seem to give this market a high priority. The following companies were able to qualify as Leaders: Birlasoft, Brillio, Hexaware, Persistent Systems, Silverline and Traction on Demand.

Compared to the last year, the structure of this year's study was expanded to include a quadrant dealing with the Implementation Services for Analytics Solutions on Salesforce. For the providers in this still comparatively young segment, there is incomplete information or only little information provided by the companies. As a result, only a few companies could be assessed this year, with the following achieving Leader status: HCL, Infosys, Persistent Systems, Tech Mahindra and Wipro.

In the next few years, the availability of qualified resources and the progressive focus on industry-specific offers will probably have a significant impact on the market for Salesforce-related services. It will also be interesting to follow Salesforce's further positioning steps.

Provider Positioning

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	Multi-Cloud Implementation & 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	Implementation Services for Analytics Solutions on Salesforce
Accenture	Leader	Not In	Not In	Leader	Not In	Not In
AllCloud	Not In	Product Challenger	Product Challenger	Not In	Market Challenger	Not In
Atos	Product Challenger	Not In	Not In	Product Challenger	Not In	Contender
Birlasoft	Not In	Leader	Not In	Not In	Leader	Not In
Brillio	Not In	Rising Star ★	Product Challenger	Not In	Leader	Not In
Capgemini	Leader	Not In	Not In	Leader	Not In	Not In
CGI	Contender	Not In	Not In	Contender	Not In	Not In
Coastal Cloud	Not In	Leader	Leader	Not In	Not In	Product Challenger
Coforge	Not In	Product Challenger	Contender	Not In	Contender	Not In

Provider Positioning

	Multi-Cloud Implementation & 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	Implementation Services for Analytics Solutions on Salesforce
Cognizant	Leader	Not In	Not In	Leader	Not In	Not In
Customertimes	Leader	Not In	Not In	Product Challenger	Not In	Product Challenger
Deloitte Digital	Leader	Not In	Not In	Market Challenger	Not In	Not In
Dentsu	Not In	Not In	Leader	Not In	Not In	Not In
EPAM	Contender	Not In	Not In	Contender	Not In	Not In
Fujitsu	Contender	Not In	Not In	Contender	Not In	Not In
Grazitti Interactive	Not In	Product Challenger	Not In	Not In	Product Challenger	Product Challenger
HCL	Leader	Not In	Not In	Leader	Not In	Leader
Hexaware	Not In	Leader	Product Challenger	Not In	Leader	Not In

Provider Positioning

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	Multi-Cloud Implementation & 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	Implementation Services for Analytics Solutions on Salesforce
Huron	Not In	Market Challenger	Market Challenger	Not In	Market Challenger	Not In
IBM	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In
Infosys	Leader	Not In	Not In	Leader	Not In	Leader
Jade Global	Not In	Product Challenger	Product Challenger	Not In	Not In	Not In
LTI	Product Challenger	Not In	Not In	Leader	Not In	Not In
Marlabs	Not In	Product Challenger	Contender	Not In	Product Challenger	Not In
Mindtree	Leader	Not In	Not In	Leader	Not In	Not In
Mphasis	Not In	Not In	Not In	Product Challenger	Not In	Not In
NTT DATA	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In

Provider Positioning

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	Multi-Cloud Implementation & 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	Implementation Services for Analytics Solutions on Salesforce
Perficient	Not In	Contender	Contender	Not In	Not In	Not In
Persistent Systems	Product Challenger	Leader	Leader	Product Challenger	Leader	Leader
PwC	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In
Reply	Not In	Product Challenger	Product Challenger	Not In	Not In	Not In
Silverline	Not In	Leader	Leader	Not In	Leader	Product Challenger
Slalom	Product Challenger	Not In	Leader	Product Challenger	Not In	Not In
SLK Group	Not In	Contender	Not In	Not In	Not In	Not In
Tavant	Not In	Product Challenger	Contender	Not In	Product Challenger	Not In
TCS	Leader	Not In	Not In	Leader	Not In	Not In

Provider Positioning

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	Multi-Cloud Implementation & 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	Implementation Services for Analytics Solutions on Salesforce
Tech Mahindra	Product Challenger	Not In	Not In	Leader	Not In	Leader
Traction on Demand	Not In	Leader	Leader	Not In	Leader	Product Challenger
Visionet	Not In	Contender	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Not In	Not In	Leader	Not In	Leader
Zennify	Not In	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Zensar Technologies	Not In	Market Challenger	Market Challenger	Not In	Product Challenger	Market Challenger

This study focuses on what ISG perceives as most critical in 2022 for the Salesforce Ecosystem.

- Multi-Cloud Implementation & 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
- Implementation Services for Analytics Solutions on Salesforce

Simplified Illustration Source: ISG 2022

Definition

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

The ISG Provider Lens™ study offers IT decision-makers the following:

- Transparency of the strengths and weaknesses of relevant providers
- Differentiated positioning of providers by segments
- A perspective on different markets, especially the U.S., Germany and Brazil

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

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following 6 quadrants: Multi-Cloud Implementation & 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, and Implementation Services for Analytics Solutions on Salesforce.

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

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

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

Provider Classifications

The provider position reflects the suitability of 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 of enterprise customers differ from those of other customers, 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.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger, and Contender), and the providers are positioned accordingly.

Each ISG Provider Lens quadrant may include a service provider(s) that ISG believes has strong potential to move into the Leader quadrant. This type of provider is classified as a Rising Star.

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

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Multi-Cloud Implementation & Integration Services for Large Enterprises

Who Should Read This

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

In this quadrant report, ISG defines the current market positioning of Salesforce multicloud implementation and integration service providers in the U.S. and how they address the key challenges faced by enterprises in the country. Over the years, Salesforce has enhanced its product approach and gone beyond customer relationship management (CRM) and its related applications, development, integration and reporting.

Enterprises in the U.S. are still impacted by the COVID-19 pandemic. With remote work still being a preferred mode of operation, Salesforce offers them with a platform to keep their businesses running.

New consumers surfaced as e-commerce surged due to the pandemic and customer experience (CX) became a priority among enterprise clients in the U.S.

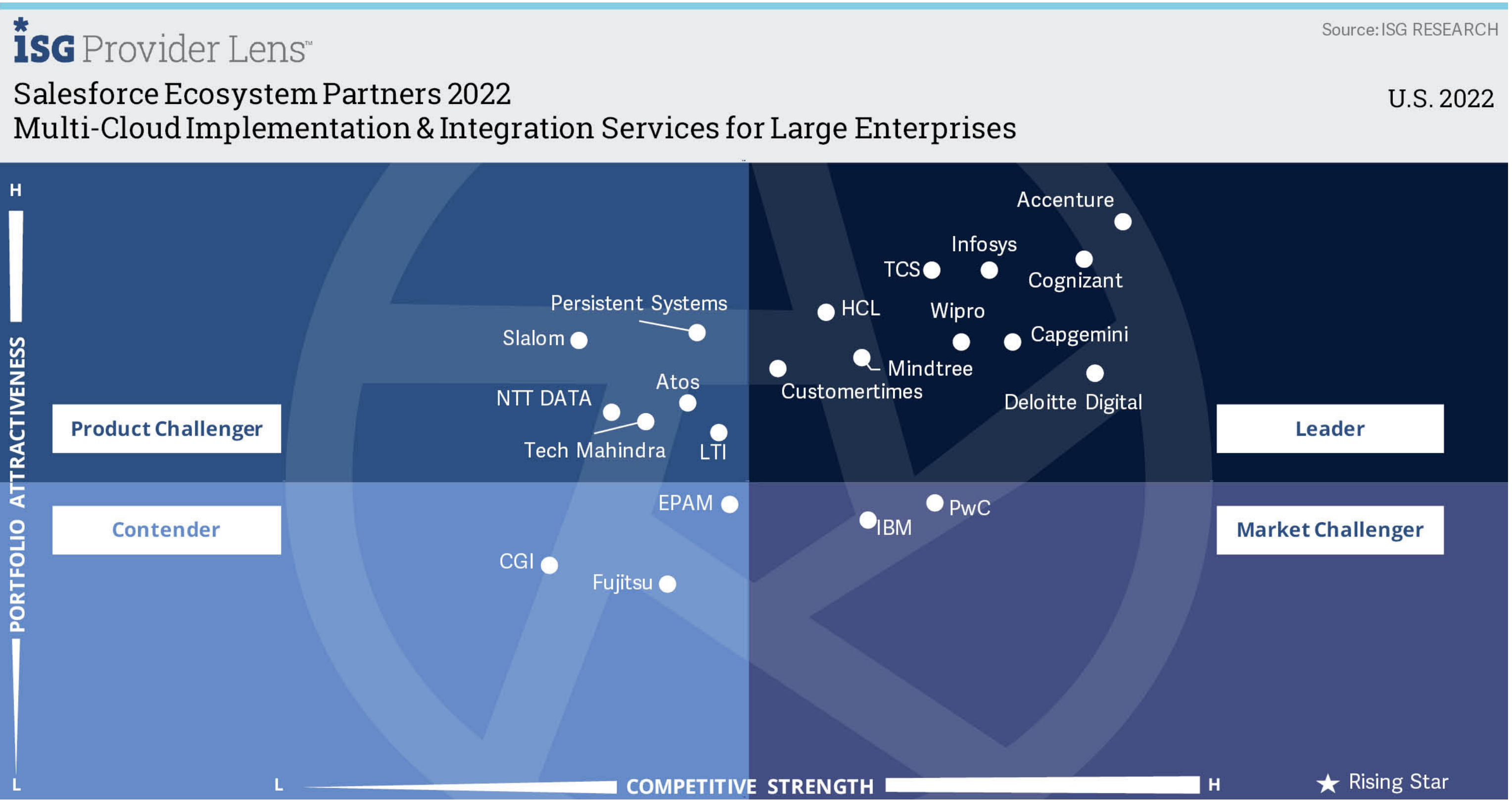
In the U.S., which is a mature Salesforce market compared with other countries/ regions, the complexity of an enterprise's underlying application landscape is proportional to its size. The hybrid Agile model is now the most common approach for global deployments, while the pure Agile methodology is suitable 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 providers 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 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.



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

Rainer Suletzki

Definition

This quadrant includes providers of implementation services for Salesforce applications as well as the integration of these applications with other major standard software solutions that are usually part of the complex system landscape of large and globally operating enterprise clients. The scope takes into consideration that these clients in most cases use various cloud products of the Salesforce portfolio.

Eligibility Criteria

1. Strong implementation capabilities (consulting, configuration, data migration and go-live) across all Salesforce products
2. Deep knowledge about the major standard software packages other than Salesforce in combination with the ability to implement end-to-end processes
3. Broad competencies in architecture and realization of complex application landscapes
4. Availability of predefined solutions and accelerators, preferably both functionally oriented and industry specific
5. Delivery capabilities at scale to serve large enterprise clients
6. Compelling list of use cases and references

Observations

There has been a continuously strong growth in the market for Salesforce implementation and integration services over ther recent years. Meanwhile, the availability of qualified resources with Salesforce expertise has turned out to be a limiting factor for the number of implementations. This has resulted in significant consolidation pressure in the market for corresponding services, with the large system integrators in particular trying to expand their resource base by taking over other providers, primarily midsize providers with a strong portfolio and notable resource base. Although this does, by itself, not generate additional capacities, this process is likely to continue.

From over 90 companies assessed for this study, 21 have qualified for this quadrant with 11 being Leaders:

accenture

Accenture exhibits impressive scale and offers a comprehensive library of industry-specific solutions. Integration requirements are covered by comprehensive MuleSoft capabilities.

Capgemini

Capgemini relies upon its long-standing experience in CRM modernization. This is a strong asset for transformations based on Salesforce. Powerful, predefined solutions prove the deep domain expertise in various industries.

Cognizant

Cognizant has one of the fastest growing Salesforce practices and relies on a mature commercial model and a strong partnership with Salesforce.

Customertimes

A strong focus on achieving business value is a main characteristic in the implementations conducted by **Customertimes**. The provider shows deep domain expertise in six key industries.

Deloitte Digital

Deloitte Digital offers the integration and alignment of business processes with technology and helps clients achieve agile implementations with high reliability.

HCL

HCL has significantly invested in its Salesforce-related workforce and offers a comprehensive suite of accelerators and productivity tools.

Infosys

Infosys covers a wide range of functionalities with its large solution repository and operates a large MuleSoft practice that offers powerful, compelling integration capabilities.

Mindtree

Mindtree has focused its attention on multicloud implementation projects. Its portfolio includes a specific client enabling offering with a Center of Excellence (CoE) Enablement model.

TCS

TCS offers a powerful modular solutions library and drives the development of innovations based on Salesforce, in cooperation with the clients. A particular characteristic is the growth strategy that focuses on organic growth.

wipro

Wipro has shown significant growth in scope and scale over the recent years, with a specific focus on strengthening the capabilities for onshore delivery. The portfolio is centered around solutions for verticals.

HCL

Leader

"HCL is a highly capable Salesforce implementation partner that is strongly focused on integration and data management aspects."

Rainer Suletzki

Overview

HCL Technologies Limited offers software, IT infrastructure and business process outsourcing (BPO) services worldwide. The company was founded in 1976 and has its headquarters in Noida, India. HCL's Salesforce practice was established in 2010 and has grown to include more than 2,800 consultants. The consultants hold more than 2,600 Salesforce certifications. The company's portfolio covers consulting, implementation, support and integration services, including migration of applications to the Salesforce platform.

Strengths

Comprehensive portfolio of accelerators: The portfolio includes various accelerators that are mostly designed to increase efficiency during project execution. For example, it offers a solution to support the setup of the Commerce Cloud for B2B. Furthermore, productivity tools such as a test class generator are part of its offerings.

Predefined solutions for migration and consolidation: HCL offers comprehensive migration solutions for various client situations, for instance, the migration from legacy CRM systems to Salesforce. Furthermore, a dedicated instance consolidation service is available for companies, where several Salesforce instances have been established independently of one another, leading to a scattered system structure.

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

Large investments in workforce: Most recently, HCL has significantly invested in a number of Salesforce experienced consultants and the respective certifications by Salesforce. Its short-term goal is to achieve expert level status in all core clouds and three industry clouds.

Caution

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

The industry-specific expertise should be strengthened by offering predefined solutions for additional industries such as automotive or process industries.

Implementation Services for Core Clouds Midmarket

Who Should Read This

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

In this quadrant report, ISG defines the current market positioning of providers of Salesforce implementation services for core clouds in the U.S. and how they address the key challenges faced by enterprises in the country. The report assesses providers that specialize in Salesforce Sales, Service and Commerce Cloud offerings. These providers adopt an Agile approach for implementation, helping clients redesign processes and enabling the same with Salesforce applications. Due to the COVID-19 pandemic, many enterprise clients had to operate remotely, but Salesforce provided them with a platform to keep their businesses running.

Cloud-based solutions that have seamless integration capabilities with third-party applications have been the top priority for enterprises seeking Salesforce core cloud implementation services. Unlike large enterprises, small and midsize companies seek Salesforce implementation services for core clouds to help them with projects that do not have significant integration needs. These companies are less complex when it comes to digital transformation. Hence, deployment is faster, with easy-to-use services and cost-saving advantages.

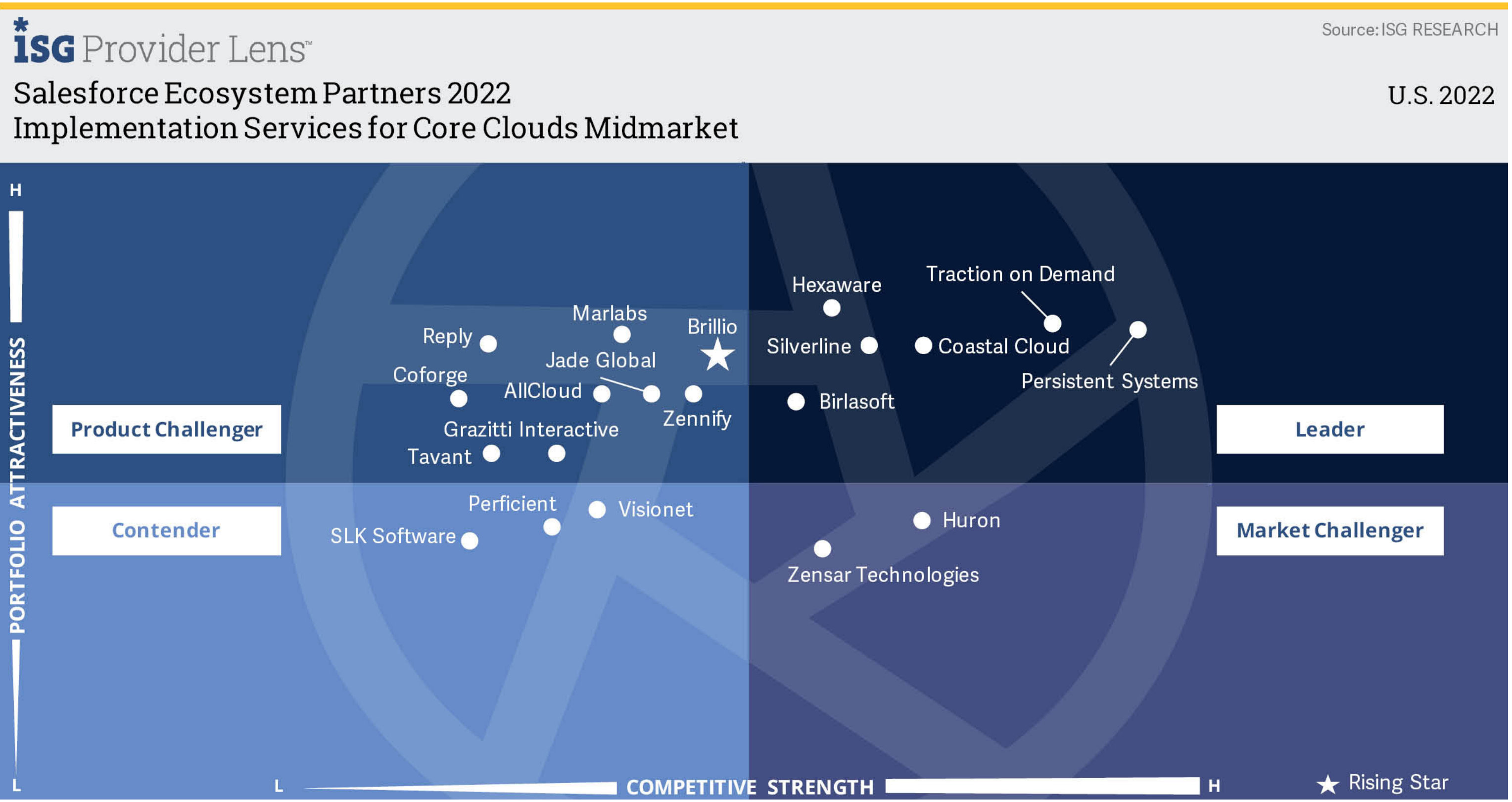
In the U.S., which is a mature Salesforce market compared with other countries/regions, the increase in demand for Salesforce implementation services for core clouds drives the growth for most service providers in this segment. ISG research shows that the supply of Salesforce implementation capabilities 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 providers 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.



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

Rainer Suletzki

Definition

This quadrant addresses providers that specialize in Salesforce Sales, Service and Commerce Cloud. These products are broadly considered as the core clouds of Salesforce. These providers mostly take an agile approach for implementation and focus on cases where less integration is required, typically for medium and small-sized clients. An important aspect of the services they offer revolves around consulting on the redesign of processes while using Salesforce applications.

Eligibility Criteria

1. Strong implementation capabilities (consulting, configuration, data migration and go-live) for the Salesforce Core Clouds (at least for Sales, Service and Commerce Cloud)
2. Provision of training and enabling client personnel to use the application
3. Availability of predefined solutions and accelerators, preferably both functionally oriented and industry specific
4. Unique differentiators
5. Economic stability and significant delivery capabilities to serve numerous clients
6. Compelling list of use cases and references

Observations

The continuous consolidation process in the market for Salesforce implementations induced by the remarkable growth has led to many changes in the provider landscape over time. Several midsize providers have been acquired by the large system integrators, which on the other hand opened additional opportunities for other providers to fill the respective gaps. Most recently, Salesforce itself accelerated this process by starting to build up significant implementation capacities through acquisitions of midsize players. In late February 2002, after completions of the survey for this report, Salesforce announced to take over the midmarket provider Traction on Demand, which is a leader in several quadrants of this report.

From over 90 companies assessed for this study, 21 have qualified for this quadrant with six being Leaders and one being Rising Star:

Birlasoft

Birlasoft follows a comprehensive implementation methodology that creates predefined packages for all relevant project phases and a sophisticated governance model.

Coastal Cloud

Coastal Cloud combines a well-defined agile methodology for multi-cloud implementations with strong industry expertise and a focus on data quality. It has expertise in numerous Salesforce products.

Hexaware

Hexaware shows strong industry expertise and has developed several sophisticated industry solutions, for instance, for life sciences. The integration capabilities using the MuleSoft platform are quite compelling.

Persistent Systems

Persistent Systems follows a strongly modular approach where all solutions are designed and developed in a way that they can easily be connected. The company has shown significant growth over the recent years.

Silverline

Silverline has deep expertise in various industries and maintains a strong partnership with Salesforce that includes cooperation in implementations for selected customers.

Traction on Demand

Traction on Demand offers a broad service portfolio with compelling strategy and design capabilities, with a main emphasis on client enablement during the entire project.

The following provider has been determined to be a rising star in this quadrant and exhibits the potential to achieve leadership position in the future:

Brillio

Brillio (Rising Star) provides powerful tool support for implementing and optimizing Salesforce instances and has deep expertise in several key industries. Mobile enablement is also a key capability in Brillio's portfolio.

Implementation Services for Marketing Cloud Midmarket

Who Should Read This

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

In this quadrant report, ISG defines the current market positioning of providers of Salesforce implementation services for Marketing Cloud in the U.S., and how they address key challenges faced by enterprises in the country. These providers focus on helping clients deliver direct, personalized customer engagement and increase revenue through one-on-one communication, at scale and across multiple channels. Marketing Cloud is often the starting point for Salesforce, and ISG observes that companies seeking Salesforce implementation services typically do not have complex, real-time integration needs.

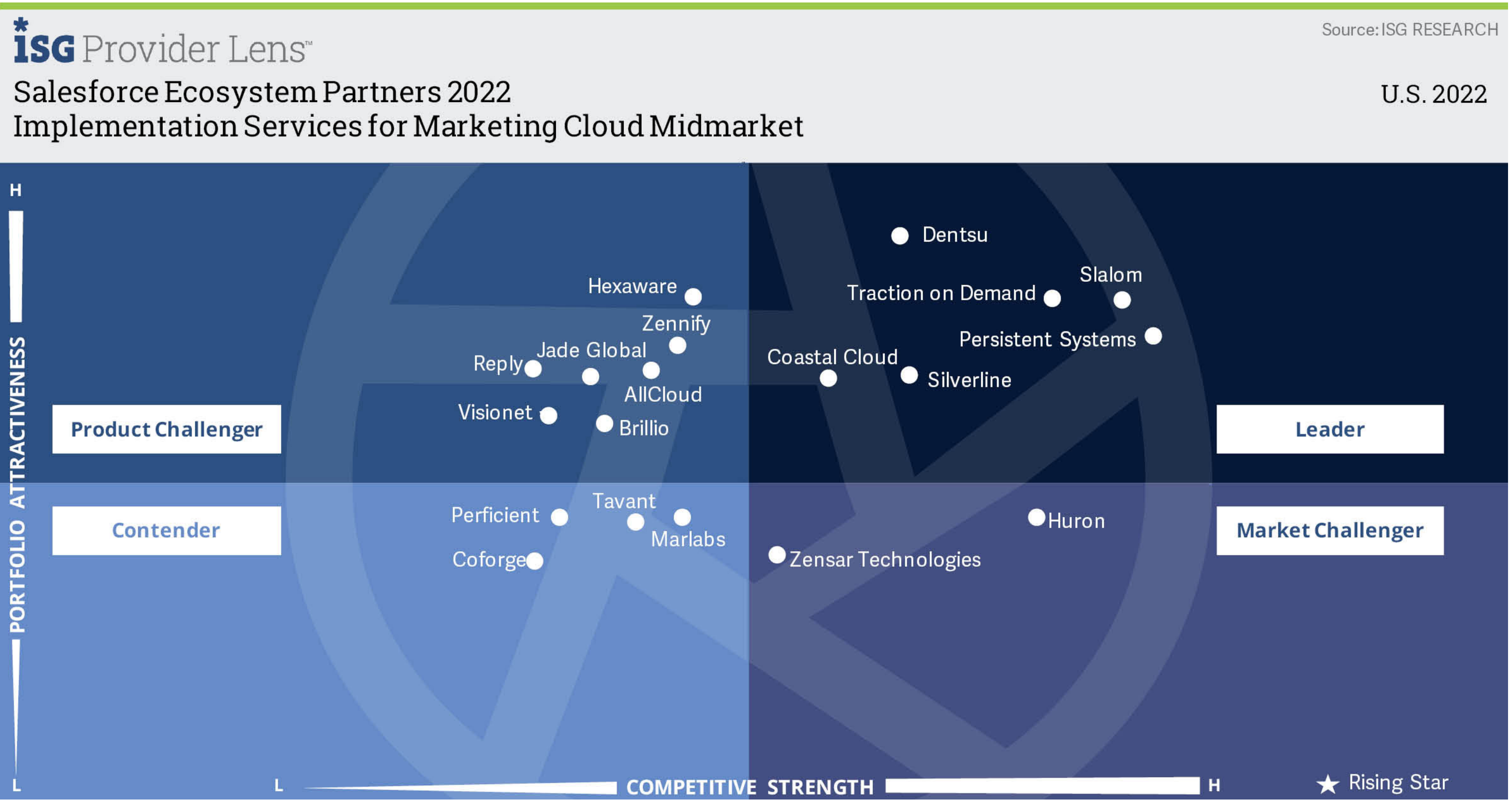
Remote working is the new norm for many enterprise clients, and Salesforce provides them with platforms to keep their businesses running. More consumers surfaced as demand for customer experience (CX) became a priority among enterprise clients in the U.S. The companies will need to embrace flexibility in their return-to-work strategies while continuing to deliver the digital-first experiences that customers and employees expect. Access to data and AI tools will help enterprises create a human touch to deliver new levels of CX.

In the U.S., the focus of Salesforce implementation services for Marketing Cloud is on enriching CX. ISG research shows a preference for business solutions rather than ones with reusable modules. This means that service providers rely on development more than component libraries to help deliver Marketing Cloud implementations. Also, as marketing functions require 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 these 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.



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

Rainer Suletzki

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. This is most typical for medium and small-sized clients. In addition, provider expertise in marketing-specific aspects such as the use of media and multichannel approaches is essential.

Eligibility Criteria

1. Strong implementation capabilities (consulting, configuration, data migration and go-live) for the Salesforce Marketing Cloud and Pardot and for marketing specific aspects such as information gathering, customer experience, digital customer journey optimization and automation of customer interactions
2. Provision of training and enabling client personnel to use the application
3. Availability of predefined solutions and accelerators, preferably both functionally oriented and industry specific
4. Unique differentiators
5. Economic stability and significant delivery capabilities to serve numerous clients
6. Compelling list of use cases and references

Observations

The implementation services for the Salesforce Marketing Cloud have to take into consideration that most marketing activities include direct interactions with end consumers of products and services. This results in large data volumes and the increasing demand for fully mobile-enabled solutions. Hence, this is an essential capability leading providers need to exhibit in this quadrant. Furthermore, with their strong domain expertise some of the large marketing agencies are also important competitors for the technology-oriented providers in this market.

The following providers have been determined to be leaders in this quadrant:

From over 90 companies assessed for this study, 19 have qualified for this quadrant with 6 being Leaders:

Coastal Cloud

Coastal Cloud exhibits a strong focus on the Salesforce Marketing Cloud, combined with powerful automation mechanisms, and is a highly capable partner for its clients' marketing functions.

Dentsu

Dentsu offers a full range of services for the Marketing Cloud, comprising strategy, consulting, configuration and custom development, based on a deep understanding of the marketing function.

Persistent Systems

The large Marketing Cloud practice of **Persistent Systems** applies a well-suited project management approach. The company shows strong focus on automation and marketing-related customer analytics.

Silverline

Silverline offers predefined packages to key industries for the staggered implementation of Salesforce. The use of powerful automation mechanisms is a key element in Silverline's portfolio.

Slalom

Slalom has deep expertise, especially in the areas of concept-to-commercialization, customer experience, and omnichannel commerce. With its Build-as-a-Service approach, Slalom offers an innovative way of crafting custom-built technology products.

Traction on Demand

Traction on Demand offers various predefined solutions, which are also partially available in the Salesforce AppExchange store. The company focuses on achieving a high level of automation to increase efficiency.

Managed Application Services for Large Enterprises

Who Should Read This

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

In this quadrant report, ISG defines the current market positioning of providers of Salesforce managed application services for large enterprises in the U.S. This study covers providers offering additional services, including administrative assistance, accelerators for development and utilization, development services, proactive monitoring, and advisory services. Conventional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring. To skillfully 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 provide user support and develop business applications integrated with the Salesforce environment.

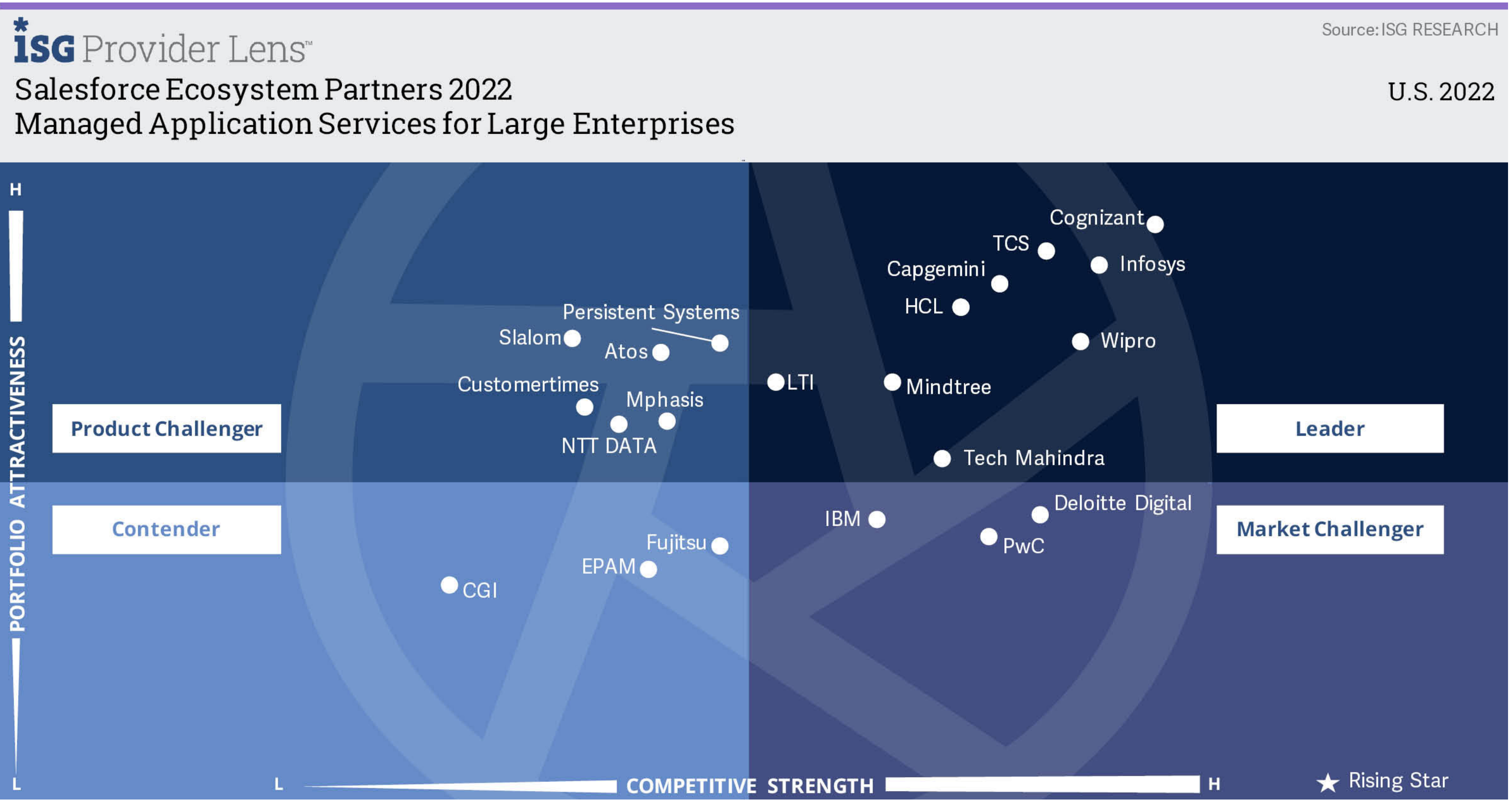
ISG notes that proximity to the enterprise workforce is an important factor in the market positioning of service providers. Service providers are facilitating enterprise clients by offering cost management for the application, planning upgrades, conducting regular training programs and expanding the 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 providers that can help 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 toward 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.



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

Rainer Suletzki

Definition

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

Eligibility Criteria

1. Well-proven experience in operational support for end-to-end processes across complex application landscapes, with specific focus on Salesforce products
2. Availability of strong methodology and comprehensive tool support, with a high degree of automation
3. Delivery capabilities at scale to serve large enterprise clients
4. Provision of mature pricing and contract models with a focus on outcome-based approaches and continuous improvement
5. Compelling list of use cases and references

Observations

Similar to the implementation services for large enterprises the coverage of the integration requirements within sophisticated application landscapes are an important factor for the strength of a respective service provider. As a consequence, the large system integrators dominate in this market since they usually can provide the support for end-to-end processes acros various software packages.

From over 90 companies assessed for this study, 22 have qualified for this quadrant with 10 being Leaders:

accenture

Accenture exhibits a strong delivery model for large enterprise clients, combined with deep functional knowledge and comprehensive technological expertise.

Capgemini

Capgemini provides a powerful model for support, maintenance and development of applications. The model is primarily outcome-focused and enables clients to drive value from their application portfolio.

Cognizant

Cognizant applies a comprehensive application management methodology and gives high priority to the quality of the application operation, for instance, with services for data cleansing and data standardization.

HCL

HCL has a strong record of reliable, scalable and flexible execution of CRM application services based on a proprietary framework for application operations and sophisticated test support.

Infosys

With several delivery centers in the U.S., **Infosys** offers a variety of tools that support efficient application management and has a clear focus on operational stability by applying its strong automation capabilities.

L&T Infotech

L&T Infotech ensures reliable operation by applying its proprietary Quality Control Suite and increasingly focuses on the continuous improvement of the managed application services.

Mindtree

Mindtree uses a variety of productivity enhancing solutions to support the management of Salesforce applications. Furthermore, the measurement of data quality is a key element in its business performance assessment.

TCS

TCS is focused on continuously optimizing its managed application services and increasing efficiency. The company offers powerful automation solutions that support application operations such as on-platform workflows or API-driven integration.

Tech Mahindra

Tech Mahindra offers support and maintenance at flexible pricing models based on business outcomes. The specific support model for Salesforce is, to a large extent, driven by automation.

wipro

Wipro uses various tools for increasing application management efficiency and can rely on a delivery model that combines offshore resources with a significant share of onshore and nearshore capabilities.

HCL

Leader

"HCL is a highly capable provider of managed application services for Salesforce-based solutions."

Rainer Suletzki

Overview

HCL Technologies Limited offers software, IT infrastructure and BPO services worldwide. The company was founded in 1976 and is headquartered in Noida, India. HCL's Salesforce practice was established in 2010 and has grown to include more than 2,800 consultants that hold more than 2,600 Salesforce certifications. The company's portfolio covers consulting, implementation, support and integration services, including migration of applications to the Salesforce platform.

Strengths

Powerful application management platform: HCL has a strong record of reliable, scalable and flexible execution of CRM application services, in general, and Salesforce, in particular. Application management is supported by HCL's proprietary ASM 2.0 framework, which offers smart application support and maintenance operations and enables the delivery of cost-effective, efficient services that focus on business value and user experience.

Comprehensive tool support: With the Text Class Generator, HCL offers a compelling productivity tool for Salesforce developers that automatically generates test classes and creates real test data. Furthermore, HCL's cloud-based master data management solution supports integration within diverse system landscapes, in addition to continuous management of data quality.

Mature delivery model: HCL runs a global delivery model with a high share of offshore resources and can offer a cost-efficient application service. Most recently, the company has significantly increased its onshore presence in the U.S., improving customer proximity.

Caution

In most cases, HCL applies a continuous support and build model where post-deployment support and project work are executed in an interrelated way. The company should offer an alternative model for clients where a stricter separation between build and support is required, for instance, in life sciences.

The Salesforce specific aspects of the application management offerings should be extended in the portfolio description.

Managed Application Services for Midmarket

Who Should Read This

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

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

To skillfully manage their Salesforce environment, 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 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 training programs and expanding the use of Salesforce within an organization.

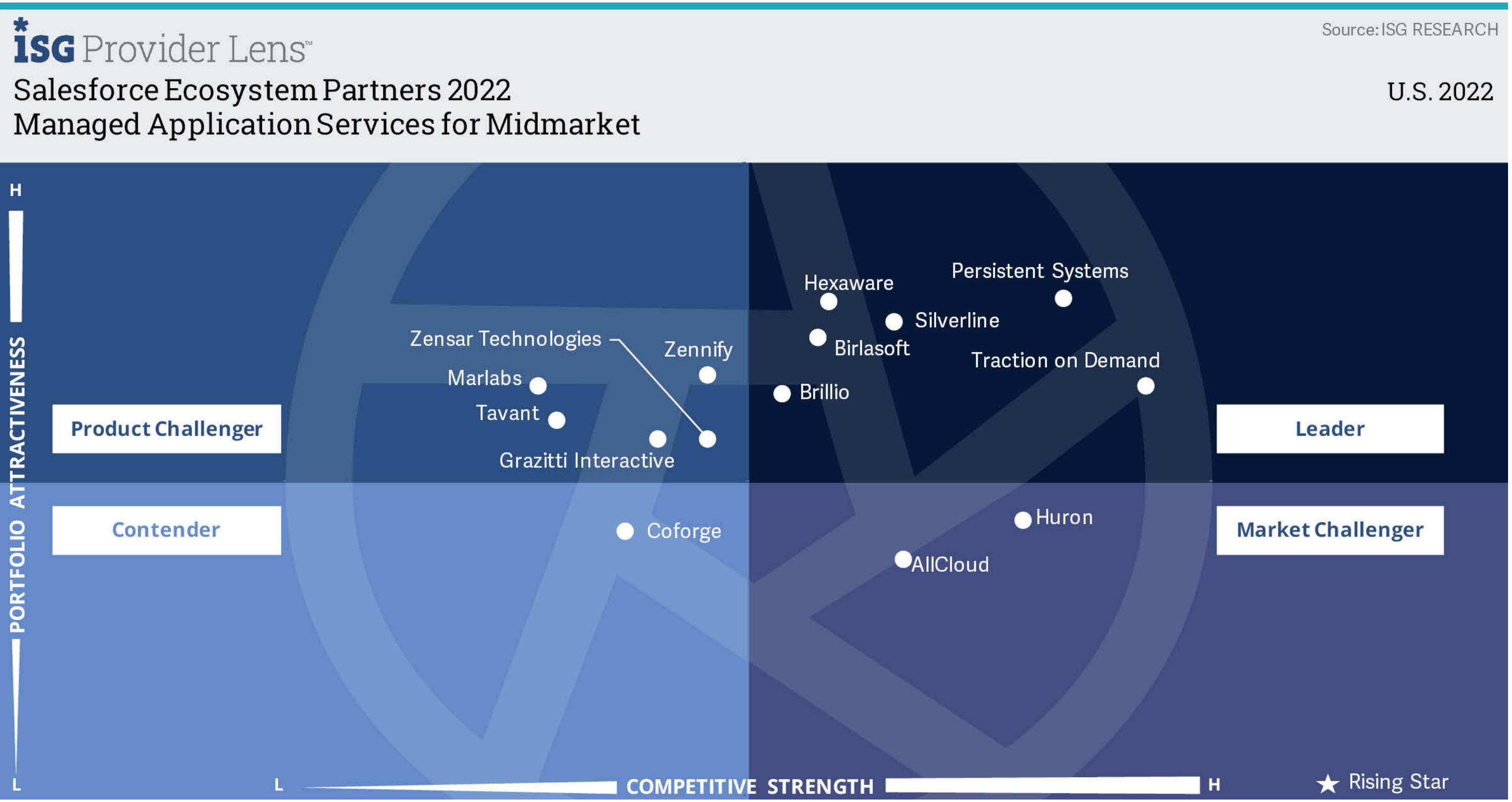
The midmarket in the U.S. can leverage the midsize providers, as they are easier to negotiate with and are gaining a considerable number of midmarket clients because of their prices and proximity to a client's site of operation. Clients that seek onshore managed services have the option of soliciting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

Marketing, sales and field services leaders should read this report to understand the relative positioning and capabilities of service providers that can help 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 toward 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.



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

Rainer Suletzki

Definition

This quadrant focuses on the capability of providers to offer managed services for maintenance and support functions that include monitoring, remote support, centralized management of Salesforce applications, data quality management, data security, and compliance-related aspects. The midmarket clients usually require lower integration aspects, and, in many cases, have a more regional focus.

Eligibility Criteria

1. Well-proven experience in operational support for application landscapes with specific focus on Salesforce products
2. Availability of strong methodology and comprehensive tool support with high degree of automation
3. Economic stability and significant delivery capabilities to serve numerous clients
4. Provision of mature pricing and contract models with focus on outcome-based approaches and continuous improvement
5. Compelling list of use cases and references.

Observations

The managed application services focused on SaaS products like Salesforce are from a functional perspective less complex than for traditional on-premise products, since a large part of the application management is conducted by the software vendor Salesforce itself. Specifically, all the platform-related aspects such as database management or performance management are covered by Salesforce. The main components that are conducted by service providers are upgrade support, data volume and license management, user training and, where needed, the managememnt of various interfaces. Due to this limited scope some of the midmarket providers focus on offering implementation services and do not put high emphasis on the managed application services business.

From over 90 companies assessed for this study, 14 have qualified for this quadrant with 6 being Leaders:

Birlasoft

Birlasoft offers the entire spectrum of application support activities for Salesforce. Service efficiency is driven by applying powerful tool support for the management of Salesforce applications.

Brillio

Brillio offers a comprehensive solution for the continuous optimization of Salesforce instances. A key element in the application management offering is the continuous SLA and service performance monitoring.

Hexaware

Hexaware provides complete and outcome-based managed application services for Salesforce, with a focus on automation and service quality. Results can be visualized on a compelling dashboard solution.

Persistent Systems

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 backend systems.

Silverline

Main characteristic of **Silverline**'s application service portfolio is a well-defined service structure with clear SLA definitions. With the Silverline Navigator, the company provides a compelling governance framework for managed services.

Traction on Demand

Traction on Demand places high emphasis on client enablement by supporting the enhancement of the client's own capabilities. Ensuring data quality as a driver of service quality is another essential part of the approach taken by the company.

Implementation Services for Analytics Solutions on Salesforce

Who Should Read This

This report is relevant to enterprises across industries in the U.S. for evaluating providers of implementation services for analytics solutions on Salesforce.

In this quadrant report, ISG highlights the current market positioning of providers of implementation services for analytics solutions on Salesforce in the U.S., delivering exceptional customer experiences and how they address key challenges faced by enterprises in the region.

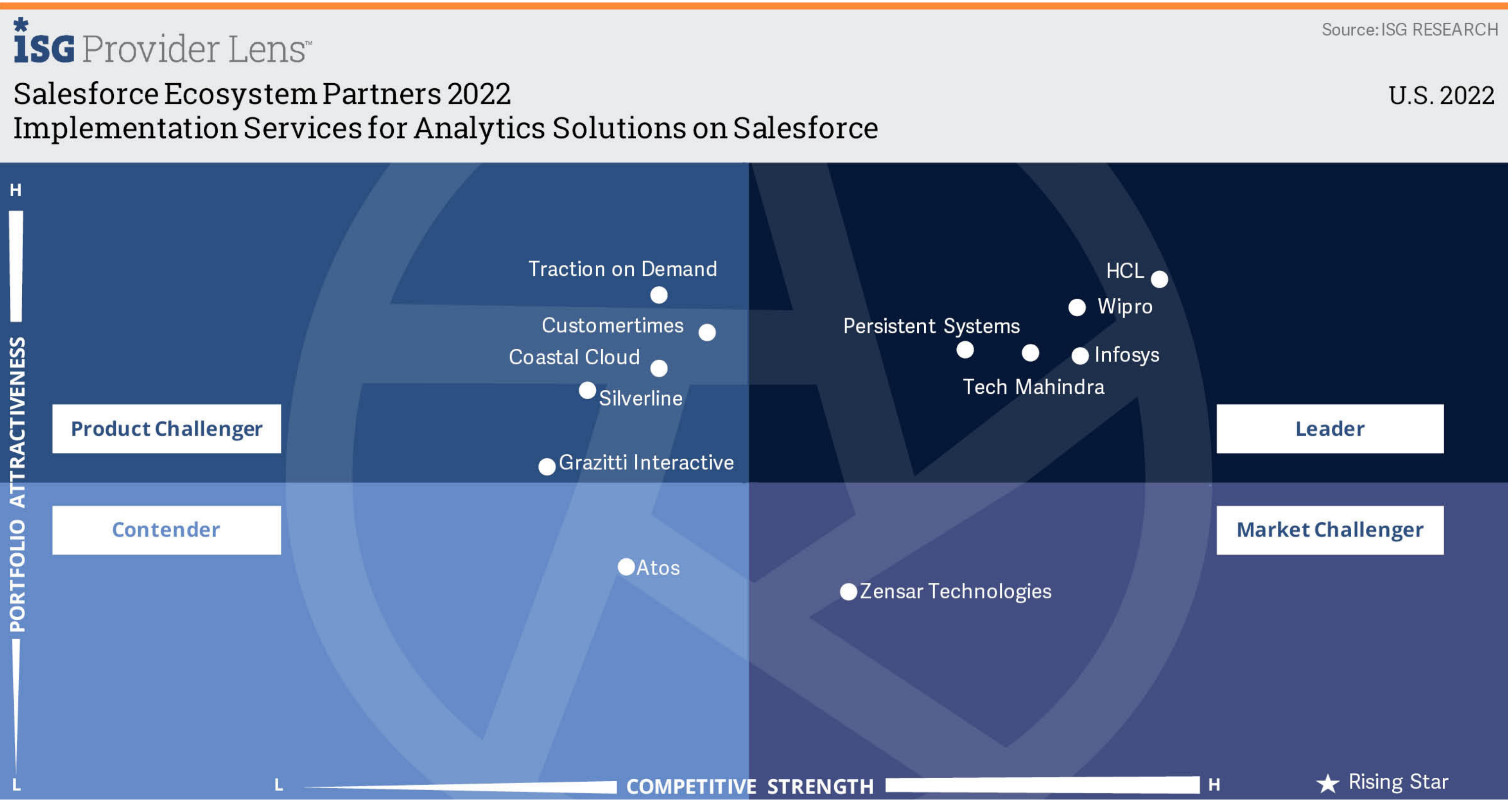
With the ongoing COVID-19 pandemic, enterprises are looking at implementing fully operational omnichannel solutions for their customers. They are engaging with providers that offer Salesforce Tableau and AI-based Salesforce Einstein to handle increasing interactions across multiple channels. This will help them reduce average handling times and enable agents to manage complex queries. In addition to the AI capabilities, enterprises are seeking deep analytics to uncover customer sentiment.

ISG sees that service providers are investing heavily in customer analytics, smart automation and conversational AI capabilities. They are not only delivering analytics-based customer insights but also real-time understandings to develop go-to-market strategies, personalized CX programs for customers and a holistic customer engagement program. In the U.S., the focus of implementation services for analytics solutions on Salesforce is on enriching CX and centralizing the master data management.

IT and technology leaders should read this report to better understand the strength and improvement areas of these providers regarding their AI and analytics offerings. The report also helps them analyze multiple offerings given by providers and select the right kind of solutions that align well with their business needs.

Digital transformation professionals should read this report to understand the broad range of AI and analytics solutions offered by providers and how they are implementing these solutions at scale to realize the desired outcome.

Vertical leaders should read this report to understand the industry-specific solutions offered by these providers backed by AI and analytics technologies.



This quadrant addresses providers of **implementation services for analytics solutions** in the context of Salesforce. These solutions may also use **third-party data** such as market research data or geographical data.

Rainer Suletzki

Definition

This quadrant addresses providers of implementation services for CRM analytics solutions in the context of Salesforce. In addition to the data that are available in Salesforce instances, these solutions may also use third-party data such as market research data or geographical data. The respective services include consulting, development of data definitions, configuring the data management and implementing reports and the respective visualizations. Mobile access is often an important part of the requirements.

Eligibility Criteria

1. Strong implementation capabilities (consulting, configuration, report development and go-live) for analytics solutions based on Salesforce data, mostly using the Tableau platform
2. Deep knowledge of the Salesforce data architecture
3. Availability of strong methodology and comprehensive tool support with high degree of automation
4. Availability of predefined solutions and accelerators for advanced analytics functionalities, preferably with industry-specific offerings
5. Compelling list of use cases and references

Observations

In this market those providers have competitive advantages which have a strong focus on data-oriented strategies and methodologies. It appears that this market is still in a rather early stage of the lifecycle, and so the number of providers offering specific analytics implementations on Salesforce has some room to grow.

From over 90 companies assessed for this study, 12 have qualified for this quadrant with 5 being Leaders:

HCL

With its Analytics Pathways approach and strong analytics implementation capabilities, **HCL** provides compelling services that supports clients in achieving a most suitable analytics solutions landscape that includes Salesforce.

Infosys

Infosys provides numerous pre-built apps and dashboards and follows a mobile-first strategy so that the applications being developed are usually fully enabled for use on smartphones and tablets.

Persistent Systems

Persistent Systems uses a strong data-oriented implementation approach that targets the use of Salesforce as an enterprise platform. The provider offers various productivity solutions that support customer analytics functions.

Tech Mahindra

Tech Mahindra exhibits compelling competencies in data-oriented application architecture and offers various productivity solutions that include master data management as a strong foundation for powerful analytics applications.

Wipro

Wipro supports clients with a transformation approach that comprises data engineering and data lifecycle management methodologies. The company has a strong focus on the mobile enablement of analytics applications.

HCL

Leader

"HCL shows compelling competencies for developing analytics solutions in the context of Salesforce applications."

Rainer Suletzki

Overview

HCL Technologies Limited offers software, IT infrastructure, and business process outsourcing (BPO) services worldwide. The company was founded in 1976 and has its headquarters in Noida, India. HCL's Salesforce practice was established in 2010 and has grown to include more than 2,800 consultants, holding more than 2,600 Salesforce certifications company wide. The company's portfolio covers consulting, implementation, support and integration services, including application migration to the Salesforce platform.

Strengths

Compelling analytics consultancy: With its Analytics Pathways approach, HCL provides a consultancy service that supports clients in laying the foundation for an analytics solutions landscape that includes Salesforce. With a respective engagement, the clients receive a roadmap that aligns initiatives with a mapping to their business value, assessments about time, implementation costs and training guides.

Strong analytics implementation capabilities: HCL has more than 700 consultants that are trained in applying the Tableau package, and a growing number of them already hold a respective Salesforce certification. Furthermore, HCL has a strong focus on the development of mobile-enabled BI solutions and operates a dedicated Mobile BI practice.

Data quality management as a foundation for reliable analytics: With its cloud-based master data management solution and the automation utility Smart Data Studio for data validation, HCL supports the continuous management of data quality in a compelling way and helps ensure reliable and powerful analytics applications in the context of Salesforce.

Caution

Beyond the general BI capabilities, HCL should further strengthen the Salesforce-specific aspects in analytics, for example, by offering standardized predefined reporting solutions that address common client situations.

HCL should expand the number of consultants with Tableau certifications.

Appendix

The ISG Provider Lens 2022 – Salesforce Ecosystem Partners research study analyzes the relevant software vendors/ service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of January 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Salesforce Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Author

Rainer Suletzki
Analyst

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

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Sidhanth is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Digital workplace, retail software and services and healthcare and life sciences digital transformation services. His area of expertise lies in ecommerce, future of workplace and virtual care. During his tenure, he has developed content from an enterprise perspective and authors the global summary report.

IPL Product Owner

Jan Erik Aase
Partner and Principal Analyst

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes;. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

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

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ISG

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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.

ISG Provider Lens™

MARCH, 2022

REPORT: SALESFORCE ECOSYSTEM PARTNERS