ISG Provider Lens™

Salesforce Ecosystem Partners

Implementation Services for Industry Clouds

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

Customized report courtesy of:

HCLTech

QUADRANT REPORT | MARCH 2023 | U.S.

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

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

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

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

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

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

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

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

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

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

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

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

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

The results by quadrant can be summarized as follows:

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

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

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

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

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

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

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

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

- Leading providers focus on using Salesforce as a platform for continuous innovation, broad integration across different applications, and end-to-end application lifecycle management.
- These providers combine technological innovation with domain and process expertise.
- Leading providers are willing to fund innovation, enter into co-development agreements and engage in outcome-based pricing models.

Continuous growth drives the demand for additional implementation capacities.

Provider Positioning

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

Provider Positioning

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

Provider Positioning

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

Provider Positioning

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

Provider Positioning

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

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

Simplified Illustration Source: ISG 2023

- Multicloud Implementation and Integration Services for Large Enterprises
- Implementation Services for Core Clouds Midmarket
- Implementation Services for Marketing Automation Midmarket
- Managed Application Services for Large Enterprises
- Managed Application Services for Midmarket
- Implementation Services for Industry Clouds

Definition

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

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

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

Scope of the Report

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

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

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

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

Provider Classifications

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

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

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

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

Provider Classifications: Quadrant Key

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

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

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.

Implementation Services for Industry Clouds

Who Should Read This Section

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

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

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

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

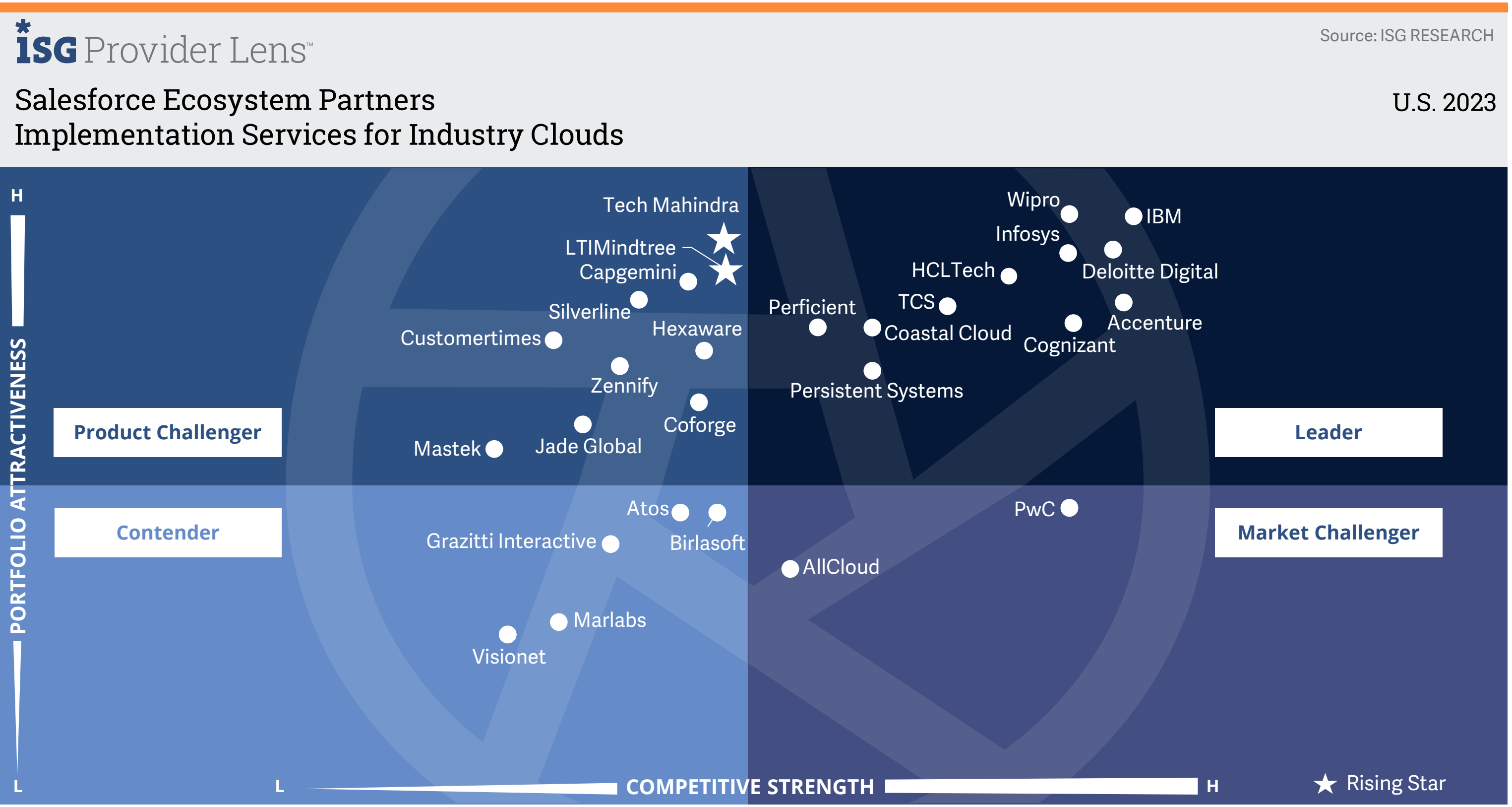
In the U.S., banking, financial services, insurance, travel, hospitality and healthcare have been marked as emerging industries.

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

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

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

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



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

Rainer Suletzki

Definition

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

Eligibility Criteria

1. Well-proven **domain expertise** for the respective industries
2. Strong **implementation capabilities** (consulting, configuration, data migration, go-live) for the Salesforce industry cloud products and the products provided by Vlocity (recently taken over by Salesforce)
3. Deep knowledge of the **Salesforce data architecture**
4. Unique **differentiators**, e. g. proven industry-specific accelerators
5. **Economic stability** and significant **delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**

Observations

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

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

accenture

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

Coastal Cloud

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

cognizant

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

Deloitte Digital

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

HCLTech

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

IBM

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

Infosys

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

Perficient

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

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

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

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

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

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

Leader

"HCLTech's Salesforce portfolio includes many powerful industry solutions."

Rainer Suletzki

HCLTech

Overview

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

Strengths

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

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

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

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

Caution

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

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

Appendix

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

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

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

The study was divided into the following steps:

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

Lead Author

Rainer Suletzki
Lead Analyst

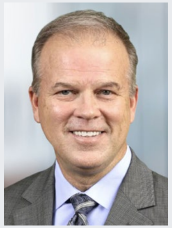
Rainer Suletzki brings more than 30 years of experience in various IT management functions within a global German life science corporation. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution. Currently he acts 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 and various projects supporting companies in defining IT strategies and the corresponding sourcing decisions.

Lead Author

Puranjeet Kumar
Senior Research Analyst

Puranjeet Kumar is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Next-Gen ADM Solutions & Services and Salesforce Ecosystem. He supports the lead analysts in the research process and authors the global summary report. Puranjeet also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Prior to this role, he worked across several syndicated market research firms and has more than eight years of experience in research and consulting, with major areas of focus in collecting, analyzing and presenting quantitative and qualitative data. His area of expertise lies across various technologies like application development, analytics, and salesforce.

IPL Product Owner



Jan Erik Aase

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, 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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