

Salesforce Ecosystem Partners

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



Executive Summary	03
Provider Positioning	07
Introduction	
Definition	12
Scope of Report	13
Provider Classifications	14
Appendix	
Methodology & Team	55
Author & Editor Biographies	56
About Our Company & Research	58
Star of Excellence	52
Customer Experience (CX) Insights	53

Multicloud Implementation and Integration Services for Large Enterprises	15 – 21
Who Should Read This Section	16
Quadrant	17
Definition & Eligibility Criteria	18
Observations	19
Provider Profile	21

Implementation Services for Core Clouds — Midmarket	22 – 26
Who Should Read This Section	23
Quadrant	24
Definition & Eligibility Criteria	25
Observations	26

Implementation Services for Marketing Automation	27 – 33
Who Should Read This Section	28
Quadrant	29
Definition & Eligibility Criteria	30
Observations	31
Provider Profile	33

Managed Application Services for Large Enterprises	34 – 39
Who Should Read This Section	35
Quadrant	36
Definition & Eligibility Criteria	37
Observations	38
Provider Profile	39

Managed Application Services for Midmarket	40 – 44
Who Should Read This Section	41
Quadrant	42
Definition & Eligibility Criteria	43
Observations	44

Implementation Services for Industry Clouds	45 – 51
Who Should Read This Section	46
Quadrant	47
Definition & Eligibility Criteria	48
Observations	49
Provider Profile	51

Report Author: Rainer Suletzki

Optimization of existing applications and the use of GenAI are current topics for Salesforce

Long-term growth and resulting resource situation

Since its inception in 1999, Salesforce has demonstrated impressive growth over many years and is now one of the leading providers of cloud-based application systems in the form of software as a service (SaaS). While growth rates were between 24 percent and 29 percent from 2018 to 2022, growth has flattened to 10–15 percent in 2023. It is not yet possible to infer whether this is a temporary phenomenon or the flattened growth should be seen as a normalization because of the company's now considerable size. However, all signs indicate that Salesforce is likely to continue to grow significantly in the coming years.

This high growth has also led to a growing demand for Salesforce-related services over the aforementioned period, primarily for

implementation support and, to an increasing extent, for support in running applications. The availability of qualified resources with Salesforce expertise has become a limiting factor for the number of implementations in the long term, even if the situation has recently eased somewhat because of market developments. This has resulted in significant consolidation pressure in the market for related services, and the large systems integrators, in particular, are constantly looking for opportunities to expand their resource base by acquiring other providers. However, this trend is still less pronounced in Germany than in the U.S. In addition to acquisition activities, which ultimately do not generate additional market capacity, many providers are focusing on increased recruiting. On the one hand, young talents are being recruited and trained as Salesforce consultants through suitable qualification measures, while on the other hand, some companies are requalifying experienced consultants from different areas for Salesforce certification. Salesforce promotes companies that contribute significantly to additional implementation capacities in its partnerships.

Currently, the growth is **flattened**, but there are high expectations regarding **GenAI innovations**.



Customer structure

The customer structure in Germany is characterized by globally active large corporations and many midsize companies, which often have a more regional focus. Another special feature of the German market is the much-cited *hidden champions*, which tend to be midsize companies but usually operate globally and have correspondingly more complex requirements.

- For global companies, large systems integrators are often the primary candidates for Salesforce implementation and operation support because of their global presence. However, some midsize providers in Germany are also suitable for such client companies because of their distinct industry expertise. The systems integrators usually have a global delivery model that combines local and regional resources with large offshore capabilities, enabling cost savings.
- Midsize companies often rely on smaller providers with a more regional focus, usually characterized by close customer proximity and an agile and fast approach.

Most of the services provided by these providers are based in Germany; however, German-speaking nearshore resources in Eastern Europe or Southern Europe (particularly Spain and Portugal) are also increasingly being used.

Provider structures and technology

In the past twelve months since the publication of the last ISG Provider Lens™ study on Salesforce Ecosystem, the German market for Salesforce implementation services has not changed significantly in structural terms beyond the general trends mentioned previously. There have been some acquisitions of midsize providers by global systems integrators; however, compared with the U.S., it is significantly fewer. It remains to be seen whether this type of consolidation will increase in Germany.

The hybrid agile model remains the preferred implementation method for global customers that need to integrate Salesforce into complex system landscapes. In most cases, this model combines agile approaches for implementation phases with phase-oriented approaches for

strategy, design and rollout. Most providers now offer this method. The purely agile method is still suitable for a single implementation of Salesforce. This is more likely to be the case for midsize customers with limited integration requirements and that do not require a global rollout.

The MuleSoft platform continues to be the dominant tool for integrating Salesforce with other applications. This means that comprehensive expertise in this platform is now a basic requirement for providers' survival in the Salesforce implementation market. The large systems integrators usually operate a dedicated unit or a department of considerable size in which the corresponding capacities are bundled.

Salesforce's verticalization strategy and its impact

A few years ago, Salesforce began to develop and launch more industry-specific products such as Financial Cloud and the Health Cloud, in addition to the more functionally oriented products, including the Sales Cloud and the Service Cloud. In the meantime, many other

products have been added, which still have varying degrees of maturity because of the different introduction times. The verticalization of the product range is now an explicit strategy of Salesforce, which was significantly accelerated by the acquisition of Vlocity in 2020. As an ISV, Vlocity was traditionally focused on developing industry-specific applications on the Salesforce platform. Following the acquisition, its capabilities helped strengthen Salesforce's industry-specific products. Today, its products are the core of Salesforce's verticalization strategy.

This approach of Salesforce presents service providers with several opportunities for additional sales while also creating some challenges. For example, the new products are an opportunity to gain additional customers for providers with technological expertise and content expertise for specific industries. On the other hand, this new approach requires customers to focus on the new possibilities and make a decision on possible use. However, ISG has observed that the potential additional license costs are increasingly being viewed critically. This is all the more true as the



licenses for Salesforce have now become a considerable cost factor for many companies. It is also often not yet sufficiently clear which transition models Salesforce will offer for those customers that have already invested heavily in the functional clouds and are, therefore, initially reluctant to transition to industry-specific clouds. At this point, service providers are generally required to develop suitable consulting services for efficient license management. Salesforce must adapt its pricing models to these new challenges.

In general, it can be observed that many customers find it challenging to keep up with the pace of innovation of software providers, including Salesforce, and to take advantage of new opportunities. Strategic developments such as the verticalization strategy described previously are often perceived as disruptive and sometimes lead to customers initially closing themselves off to new developments. Here, service providers are also expected to provide their respective customers with appropriate consulting services to competently support them in evaluating changes and making the necessary selection decisions.

Partnerships

There is still a great need to cover requirements beyond the standardized functional scope of Salesforce products with additional products from ISVs. These are generally offered with separate licensing and provided via a portal operated by Salesforce called the *AppExchange* store. Salesforce ensures that the individual apps meet the basic requirements for software quality such as bug fixing, maintenance cycles and compatibility with Salesforce products. A strong network of partnerships with ISVs within the Salesforce ecosystem remains vital for all vendors, regardless of whether they are systems integrators or smaller, specialized Salesforce vendors (so-called boutique vendors). This applies not only to implementation but also to the subsequent continuous support of ongoing operations.

Many providers also benefit from close partnerships with Salesforce itself. Some of these are development partnerships, which may result in a joint product launch. In individual cases of implementation, Salesforce has partnerships with service providers. This step offers the

relevant providers additional opportunities, potentially leading to a growing dependency on Salesforce.

Current technological developments

Regarding innovation, the central topic in IT is the use of generative AI (GenAI). Especially since the truly extraordinary success of ChatGPT from OpenAI, the use of such developments has been the focus of technological development for all software providers such as Salesforce. In mid-2023, the company announced the integration of OpenAI's products into its proprietary offering to develop Einstein GPT. In this context, the Salesforce Data Cloud will also be significantly expanded as a central platform for data management, as Einstein GPT relies heavily on its use. Service providers are also key partners of their customers in evaluating these new possibilities and their productive use. In addition, many service providers also have expertise in integrating with OpenAI or other products currently being introduced, such as Microsoft or Google. There are already some promising approaches and successful initial implementations. However, most of these

projects are still in the early and experimental phases. At present, owing to the limited experience with these technologies, it is not yet possible to make sufficiently reliable predictions about further developments. In particular, it is currently impossible to predict which products will establish themselves in the market in the long term. However, it is clear that these technologies and their use will significantly impact developments in the coming years.

Concluding remarks on leading service providers in this study:

- Leading providers have technological expertise, together with strong process knowledge, to ensure effective Salesforce implementations.
- Leading providers maintain close partnerships with Salesforce and other technology providers and ISVs.
- Leading providers can support customers in using Salesforce as a platform for continuous innovation. GenAI will be a key topic in the coming years.



Executive Summary

- Leading providers not only support customers in efficiently designing their operations but also help them make optimum use of their licenses and the associated cost management.

Despite the recent flattening growth rates in the market, all indicators point toward continued expansion of Salesforce in the coming years. The market for Salesforce implementations is largely driven by its verticalization strategy and innovation through GenAI. The latter indicates a more decisive shift toward data-oriented approaches.





Provider Positioning

Page 1 of 5

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Accenture	Leader	Not In	Leader	Leader	Not In	Leader
adesso SE	Not In	Leader	Leader	Not In	Leader	Leader
Aquilliance	Not In	Product Challenger	Not In	Not In	Contender	Not In
Assist Digital	Not In	Product Challenger	Contender	Not In	Not In	Not In
BearingPoint	Not In	Market Challenger	Not In	Not In	Product Challenger	Not In
Brighter Cloud	Not In	Contender	Not In	Not In	Not In	Not In
Capgemini	Leader	Not In	Leader	Leader	Not In	Leader
CGI	Contender	Not In	Not In	Contender	Not In	Not In
Cloud Consulting Group	Not In	Leader	Product Challenger	Not In	Rising Star ★	Contender





Provider Positioning

Page 2 of 5

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Cloud Monsters	Not In	Rising Star ★	Product Challenger	Not In	Product Challenger	Contender
Cloudity	Not In	Product Challenger	Not In	Not In	Contender	Not In
Cognizant	Leader	Not In	Leader	Leader	Not In	Leader
Customertimes	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Deloitte	Leader	Not In	Leader	Market Challenger	Not In	Leader
Deutsche Telekom	Not In	Leader	Leader	Not In	Leader	Leader
DIA	Not In	Leader	Product Challenger	Not In	Rising Star ★	Product Challenger
DIGITALL	Not In	Leader	Leader	Not In	Leader	Market Challenger
dotSource	Not In	Product Challenger	Not In	Not In	Product Challenger	Product Challenger





	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Eigenherd	Not In	Contender	Not In	Not In	Contender	Not In
Empaua	Not In	Product Challenger	Contender	Not In	Product Challenger	Not In
EPAM	Contender	Not In	Not In	Contender	Not In	Not In
Eviden	Product Challenger	Not In	Contender	Product Challenger	Not In	Contender
Factory42	Not In	Leader	Rising Star ★	Not In	Leader	Product Challenger
Fujitsu	Contender	Not In	Not In	Contender	Not In	Not In
HCLTech	Leader	Not In	Product Challenger	Leader	Not In	Leader
IBM	Leader	Not In	Market Challenger	Leader	Not In	Leader
Ilum:e Informatik	Not In	Contender	Not In	Not In	Contender	Not In





Provider Positioning

Page 4 of 5

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Infosys	Leader	Not In	Leader	Leader	Not In	Leader
KPMG	Market Challenger	Not In	Not In	Not In	Not In	Not In
LTIMindtree	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Product Challenger
mindsquare	Not In	Contender	Not In	Not In	Contender	Not In
NTT DATA	Product Challenger	Not In	Not In	Product Challenger	Not In	Product Challenger
OSF Digital	Product Challenger	Not In	Not In	Not In	Not In	Not In
Persistent Systems	Product Challenger	Leader	Product Challenger	Product Challenger	Leader	Product Challenger
PwC	Leader	Not In	Market Challenger	Market Challenger	Not In	Market Challenger
Reply	Leader	Not In	Leader	Product Challenger	Not In	Rising Star ★





Provider Positioning

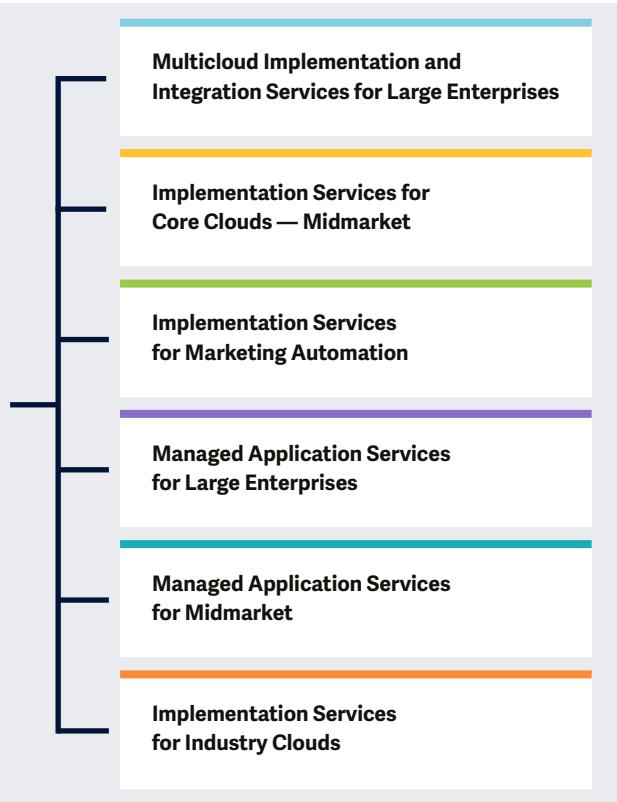
Page 5 of 5

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Salesfive	Not In	Leader	Leader	Not In	Leader	Product Challenger
Sopra Steria	Contender	Not In	Not In	Contender	Not In	Not In
TCS	Rising Star ★	Not In	Product Challenger	Leader	Not In	Product Challenger
Tech Mahindra	Rising Star ★	Not In	Product Challenger	Leader	Not In	Product Challenger
UST	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Wipro	Leader	Not In	Product Challenger	Leader	Not In	Leader



Current focus areas for service providers in the Salesforce ecosystem

Simplified Illustration; Source: ISG 2024



Definition

The “Salesforce Ecosystem” study examines various offerings relating to the Salesforce platform; a distinction is made between implementation services (change business) and managed application services, which are primarily concerned with the operational support of productive applications (run business). These segments are divided into large companies and SMEs according to the customers served. This categorization is particularly important due to the high demand for Salesforce integrations in the complex application landscapes of large companies. In addition, these major customers primarily operate globally, which requires the service providers to have the corresponding delivery capabilities.

In addition to the segmentation mentioned above, the study will also include quadrants in which focused offerings are examined that represent the “sweet spot” for many of the participating providers within the ecosystem and are in demand by customers.

This annual study is being conducted for the sixth year in a row and is constantly updated to analyze Salesforce’s innovations compared to the previous year. As a result, existing quadrants may be adjusted accordingly or a quadrant may be replaced by a new, more relevant topic. Last year, for example, the “Implementation Services for Industry Clouds” quadrant was included in the study. Such updates also make it possible to adapt the study of the existing quadrants and take into account the innovations that Salesforce introduces to improve its cloud offerings. This year, Salesforce has renewed its focus on data, generative AI (GenAI) and trustworthiness across its portfolio, which is included in this analysis.



Scope of the Report

This ISG Provider Lens™ Quadrant Report covers the following six quadrants for services: Multicloud Implementation and Integration Services for Large Enterprises, Implementation Services for Core Clouds — Midmarket, Implementation Services for Marketing Automation, Managed Application Services for Large Enterprises, Managed Application Services for Midmarket, and Implementation Services for Industry Clouds.

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 (quadrants)
- Focus on the German regional market

Our study serves as the basis for important decision-making by covering providers' 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 from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$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 \$1 billion, with activities worldwide and globally distributed decision-making structures.
- **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).

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 service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.





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.





Multicloud Implementation and Integration Services for Large Enterprises

Multicloud Implementation and Integration Services for Large Enterprises

Who Should Read This Section

This quadrant is relevant to large enterprises of all industries in Germany evaluating Salesforce multicloud implementation and integration service providers. In this quadrant, ISG defines the current market positioning of these service providers and how they address the critical challenges faced by large enterprises in the country that have adopted various cloud products from the Salesforce portfolio already in use.

Over the years, Salesforce has expanded its product strategy beyond CRM applications and ensured its presence in related development, integration and reporting. ISG sees an increased demand for Salesforce implementation and integration services from enterprises. Such services can enable the adoption and use of Salesforce cloud solutions and associated tools.

In Germany, enterprises are targeting service providers specialized in the entire Salesforce cloud suite, including sales, service, CPQ (configure, price, quote), Pardot, MuleSoft and Einstein GPT, to get quick and comprehensive solutions for their business needs. ISG has recently observed a slight shift in enterprises' focus toward providers' maturity. In response, service providers focus on developing agility, flexibility, data-based insights, intelligent operations and customized solutions to deliver customer-oriented solutions.

Large enterprises with a global presence often prefer providers that have strong integration capabilities and can implement Salesforce solutions globally on their own without having to rely on partners.



Marketing and sales leaders should read this report to analyze service partners' capabilities in effectively implementing Salesforce Marketing Cloud, Sales Cloud, Heroku and related solutions.



IT leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce cloud services and integration and analysis solutions.



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

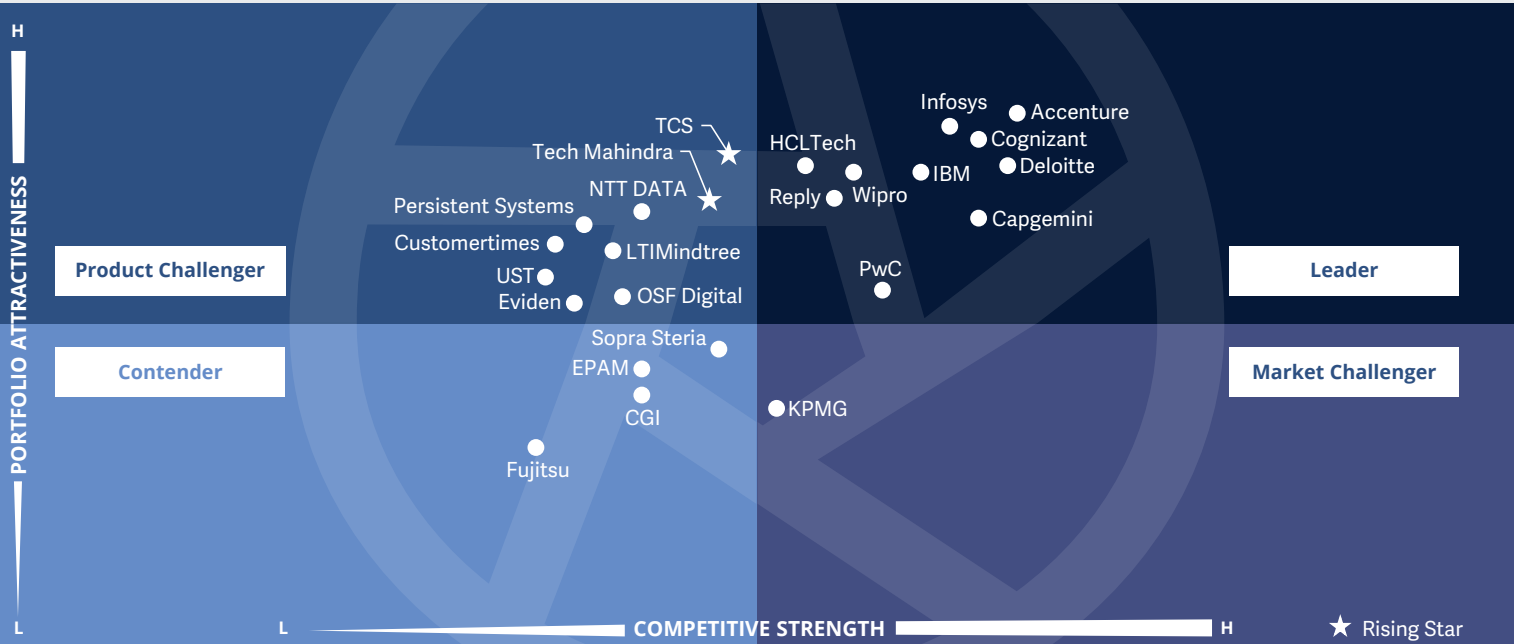


Security and data professionals should read this report to compare providers' practices and understand how they adhere to German security laws for Salesforce integration.



Salesforce Ecosystem Partners
Multicloud Implementation and Integration Services for Large Enterprises

Germany 2024



This quadrant comprises providers of **implementation services for Salesforce applications** and the **integration of these applications** with other leading enterprise platforms, most of which are used by large and globally operating companies.

Rainer Suletzki



Multicloud Implementation and Integration Services for Large Enterprises

Definition

This quadrant evaluates providers of implementation services for Salesforce applications and their seamless integration with other key enterprise software solutions. Such integrations are often a critical part of the multi-layered systems used by large, global organizations.

This comprehensive study will take into account the integral complexity of these customers' IT environments, as well as the fact that they rely heavily on multiple Salesforce clouds from the extensive Salesforce portfolio. This complex landscape requires a comprehensive approach to implementing long-term programs that may span multiple rollouts across different divisions of companies operating in multiple regions and markets.

From a functional perspective, these implementation services include process consulting to streamline operations, design to develop customized solutions, configuration to maintain optimal system performance, data cleansing to ensure data quality and accuracy, migration of legacy systems to new platforms and commissioning support for a smooth transition.

The services examined in this quadrant play a key role in enabling large, global companies to realize the full potential of Salesforce applications and optimally align their systems to achieve operational excellence and remain competitive in their respective markets.

Eligibility Criteria

1. Strong implementation skills (**consulting, configuration, data migration and go-live**) for all Salesforce products
2. **Sound knowledge** of the most important standard software packages in addition to Salesforce and the **implementation of end-to-end processes**
3. Broad **expertise in architecture** and realization of complex application landscapes
4. Availability of **predefined solutions** and accelerators, preferably both function-oriented and industry-specific
5. Scalable **delivery capacities** for supporting large corporate customers
6. Convincing list of use cases and **references**



Multicloud Implementation and Integration Services for Large Enterprises

Observations

In recent years, the market for Salesforce-related services has seen continuous growth. Even though the market is experiencing a steady growth, there is still a persistent shortage of qualified resources with Salesforce expertise, which continues to limit the number of implementations carried out. The recent decline in growth rate has eased the situation somewhat. In the large enterprise segment, there have been only a few consolidations through acquisitions in Germany, recently. The majority are multicloud implementations, and in several cases, the Salesforce platform is being used as a cornerstone for companywide innovations.

The large account segment continues to be dominated by large systems integrators that are continuously expanding their onshore capacities to improve proximity to their customers. One focus is on the upcoming integration of GenAI with Salesforce. Service providers must continue to make significant investments to keep up with the rapid pace of innovation.

From the 90 companies assessed for this study, 24 qualified for this quadrant, with 10 being Leaders and two Rising Stars.



Accenture has a strong position in the market and impresses with a complete portfolio and competent support for innovations. One of the 15 Innovation Centers is located in Germany (Essen).



Capgemini offers a standardized and proven methodology for modernizing CRM systems, especially for Salesforce. The portfolio also includes a range of functionally powerful predefined solutions.



Cognizant has enjoyed considerable growth in recent years and has a strong focus on integration. The company offers comprehensive services for harmonizing, consolidating and migrating data.

Deloitte.

Deloitte Digital offers a remarkable combination of content and technological expertise with numerous preconfigured solutions. With its strong presence in the German market, it is characterized by customer proximity and resource availability.

HCLTech

HCLTech offers a comprehensive range of innovative solutions based on the Salesforce product range. The company also emphasizes data quality as a key factor for successful implementation projects.

IBM.

Based on design thinking, **IBM** offers clients a strong methodology and tools for developing solutions that align with business requirements. The increasing use of GenAI components underlines the focus on innovation.

Infosys®

Infosys' portfolio offers a variety of tools that help customers migrate legacy applications to the Salesforce platform. The proprietary Infosys AI Framework is available for leveraging the power of AI.



PwC excels particularly in the conceptual phases of digital transformation using Salesforce. The company also offers many preconfigured solutions based on considerable industry expertise.

REPLY

Reply has a clear focus on implementing Salesforce using Agile methods and has an extensive experience in multicloud projects. The company focuses primarily on customized solutions.



Multicloud Implementation and Integration Services for Large Enterprises



Wipro offers a range of methods and tools that can be used for efficient Salesforce implementations. The company is also investing significantly in AI, for example, in CoEs that operate jointly with customers.



TCS (Rising Star) portfolio includes a comprehensive solution library geared toward industry requirements or defined business processes. It has recently developed a high level of expertise in innovations jointly driven with customers.



Tech Mahindra (Rising Star) offers a strong project methodology, numerous templates and productivity tools for the implementation phase, and a universal solution for largely rule-driven data migrations.





“Cognizant is a competent partner for implementing Salesforce applications and offers convincing industry-specific solutions.”

Rainer Suletzki

Cognizant

Overview

Cognizant is a global provider of IT services and has increasingly focused on the digital transformation of core business processes in recent years. It has been supporting the implementation of Salesforce for more than 10 years, covering the entire chain from design to implementation and operational support. It is headquartered in New Jersey, U.S., and employs more than 346,600 people in 147 offices in 50 countries. In FY22 the company generated \$19.4 billion in revenue.

Strengths

Strong growth in the Salesforce area:

Cognizant has considerably grown in the market for Salesforce implementation services compared to its competitors. The growth is driven by the continuous expansion of its resources and, to a significant extent, by acquisitions. Particular attention is given to increasing the services provided in the country.

Powerful services for data migration:

Cognizant offers comprehensive services for harmonizing, consolidating and migrating data as part of Salesforce implementations. The aim is to achieve the highest possible data quality, including using GenAI solutions.

Focus on integration:

The integration of Salesforce with other applications is supported comprehensively by defining key integration points at the start of a project and deploying it into the application landscape along these integration points as the project progresses. The MuleSoft platform, for which Cognizant has considerable capacities, is usually used for this purpose.

Caution

The strengthening of the onshore presence in Germany, which has already begun, should be steadily pursued to further increase the scalability of the proportion of its services provided regionally. The proportion of services provided from nearshore locations also has potential for expansion.





Implementation Services for Core Clouds – Midmarket

Implementation Services for Core Clouds – Midmarket

Who Should Read This Section

This quadrant is relevant to small and midsize enterprises across all industries in Germany that are evaluating providers of implementation services for Salesforce Sales Cloud, Salesforce Service Cloud and Salesforce Commerce Cloud.

In this quadrant, ISG defines the current market positioning of Salesforce core cloud implementation service providers in Germany, with many expanding their services throughout the DACH region. These providers adopt an agile approach for implementation, helping clients redesign processes and enabling the implementation of Salesforce applications.

German providers focus on upgrading expertise, human-centered design and GenAI to provide best-in-class and customized solutions to enterprises according to their specific requirements. German enterprises are seeking Salesforce implementation with excellent

scalability. Service providers have consolidated the diverse existing solutions to address such requests, focusing on industry-relevant preconfigured multicloud solutions.

ISG has observed that enterprises in Germany prefer local service providers or boutique firms with a core focus on automation and AI, aiming for service improvement. These providers are sought after for their ability to deploy Salesforce solutions such as Sales Cloud, Service Cloud, Experience Cloud, MuleSoft and Tableau Analytics within a short period without disrupting the ongoing business.



IT leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce cloud services and integration and analysis solutions.



Marketing and sales leaders should read this report to understand service providers' relative positions and capabilities in implementing Salesforce Sales and Commerce Cloud, emphasizing industry-specific solutions.



Security and data professionals should read this report to compare providers' practices and understand how they adhere to German security laws for Salesforce integration.

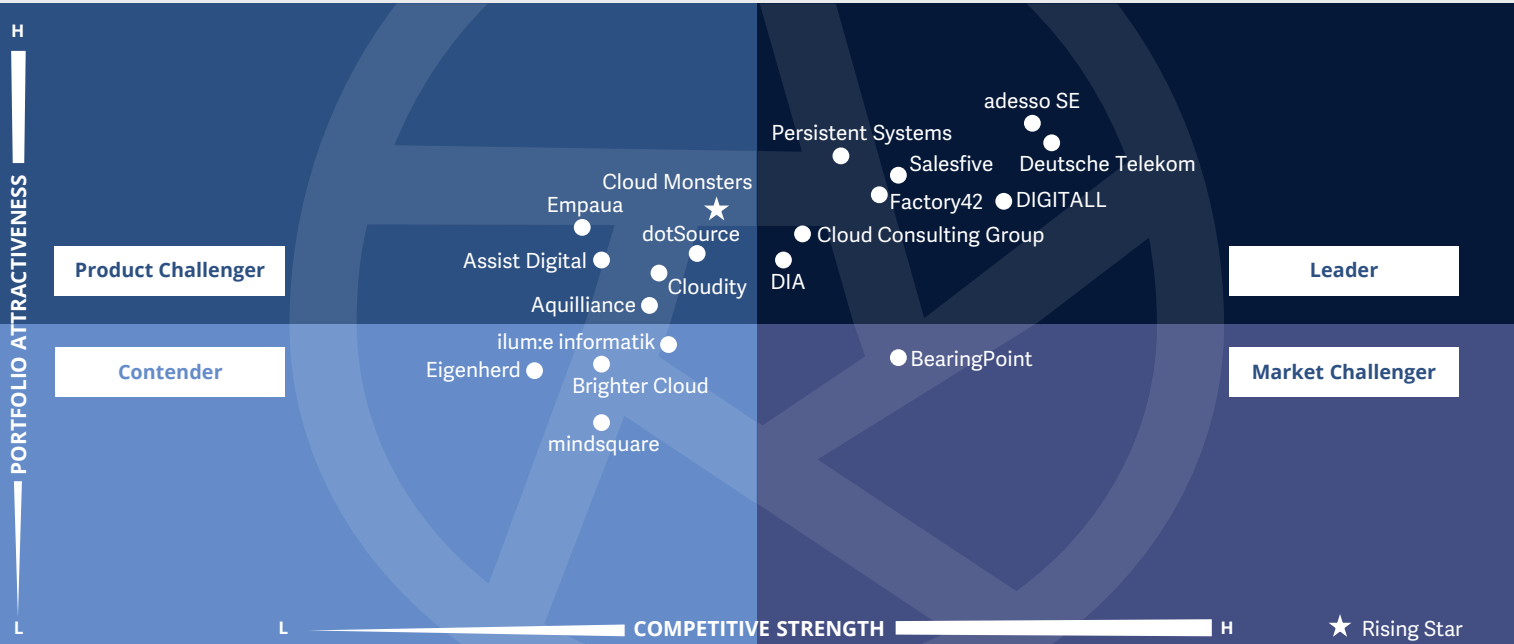


Field service managers should read this report to understand how service providers implement and enhance Salesforce services for improved field service operations.



Salesforce Ecosystem Partners
Implementation Services for Core Clouds – Midmarket

Germany 2024



This quadrant comprises providers that offer **implementation services for the Salesforce Core Clouds**. They mostly pursue an agile approach to implementation and focus on **midsize and small customers**.

Rainer Suletzki



Implementation Services for Core Clouds – Midmarket

Definition

This quadrant evaluates providers that specialize in Salesforce's core offerings - Sales Cloud, Service Cloud, Commerce Cloud and Community Cloud. These products are often seen as the foundation for Salesforce's cloud-based services. The providers in this category follow an agile implementation approach; their target group is usually medium-sized and smaller companies. Their use cases require minimal integration effort; corresponding projects can often be completed within a few months.

The services offered essentially revolve around process re-engineering using Salesforce applications. Implementation services include process consulting to optimize workflows, design to customize Salesforce solutions, configuration to maintain seamless system performance, data cleansing to improve data quality, data migration for a smooth transition and go-live support for a successful implementation.

This agile approach, combined with the focus on Salesforce's core clouds, is suitable for mid-sized and small companies with less complex requirements. It adapts seamlessly to their needs and ensures rapid utilization of Salesforce features and improved operations. By optimizing processes and leveraging these core cloud products, companies can efficiently adapt to changing market demands and achieve better results in a relatively short period of time.

Eligibility Criteria

1. Strong implementation skills (**consulting, configuration, data migration and go-live**) for the Salesforce Core Clouds (e.g. for Sales, Service and Commerce Cloud)
2. Conducting **training courses and enabling customer personnel** to use the application
3. Availability of **predefined solutions and accelerators**, preferably both function-oriented and industry-specific
4. Presence of **unique selling points**
5. Economic stability and extensive **delivery capacities** to support numerous customers
6. Convincing list of **use cases and references**



Implementation Services for Core Clouds – Midmarket

Observations

The significant growth of the market for Salesforce implementations in Germany has led to a diverse provider landscape for implementation services. Although there have also been some acquisitions of midsize providers by large, globally active systems integrators, the pressure to consolidate does not appear quite as pronounced as in the U.S. Implementations in the SME sector are mostly based on Agile methods and include various cloud products, whereby the integration requirements are generally less complex than those of large enterprises.

Many large systems integrators that usually focus on large enterprises are also active in this segment. However, the evaluation focuses on midsize providers, which midsize customers often prefer over global systems integrators.

From the 90 companies assessed for this study, 20 qualified for this quadrant, with eight being Leaders and one a Rising Star.



adesso operates with a globally oriented delivery model, which includes a high onshore presence and considerable nearshore capacities. It offers a range of starter packages to make it easier to get started.

Cloud Consulting Group

Cloud Consulting Group has acquired extensive expertise in six key industries through numerous implementation projects in recent years. The company was recently acquired by the Mindcurv Group, which is also based in Germany.



Deutsche Telekom focuses on preconfigured multicloud solutions with an industry focus. The company recently set up an AI competence center and can showcase practical applications.

DIA

DIA uses its project methodology, which is geared toward high efficiency in project implementation. The company has extensive experience in several key industries and collaborates closely with Salesforce.

DIGITALL

DIGITALL's portfolio has a well-defined structure and is based on concrete, standardized use cases. The company has considerable expertise in integration with back-end systems, especially SAP.



factory42 offers a range of Salesforce-based preconfigured solutions that can also be expanded to include self-developed applications. In addition to implementing Salesforce itself, the company provides the realization of interfaces to ERP systems.



Persistent Systems has extensive specialist and industry knowledge for the implementation of Salesforce. Owing to its considerable growth, the company can now meet the requirements of major global customers.

Salesfive

Salesfive has remarkable consulting expertise due to its considerable capacity and extensive range of certifications. It also offers seamless integration with third-party systems, especially back-end systems like SAP.

Cloud Monsters

Cloud Monsters (Rising Star) focuses on the Core Cloud and can offer comprehensive expertise. Its implementation services cover the entire spectrum of project-related activities.





Implementation Services for Marketing Automation

Implementation Services for Marketing Automation

Who Should Read This Section

This quadrant is relevant to enterprises across all industries in Germany evaluating the implementation services providers for Salesforce marketing automation.

In this quadrant, ISG defines the current market positioning of Salesforce marketing automation implementation service providers in Germany and how they address the key challenges enterprises face in the country. These providers focus on delivering direct, personalized customer engagement and increasing revenue through tailored communication at scale and across multiple channels. Salesforce automation is often the entry point for Salesforce journeys, and ISG has observed that companies seeking implementation services for automation do not have complex real-time integration needs.

In Germany, enterprises seek service providers with capabilities around greenfield projects and complex implementations, where service providers offer services such as taking over, analyzing and restructuring with enhanced architecture and certified staff.

ISG has observed that enterprises in Germany are seeking a wide range of cloud accelerator packages and industry best practice solutions with one provider. Most regional service providers focus on consulting services, technology services and managed service packages for marketing automation. For Salesforce marketing automation solutions, enterprises prefer service providers with expertise in all marketing cloud products and components, such as marketing cloud customer data platforms, account engagement, cloud intelligence and personalization. Knowledge about direct customer interaction through mobile devices is also important.



Marketing and sales leaders should read this report to understand the implementation of Salesforce Marketing Cloud, marketing expertise, digital experience and accelerators.



Field service managers should read this report to understand the relative positioning in adopting Salesforce Marketing Cloud, comparing technical capabilities, automation depth and development methodologies.



IT leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce cloud services and integration and analysis solutions.

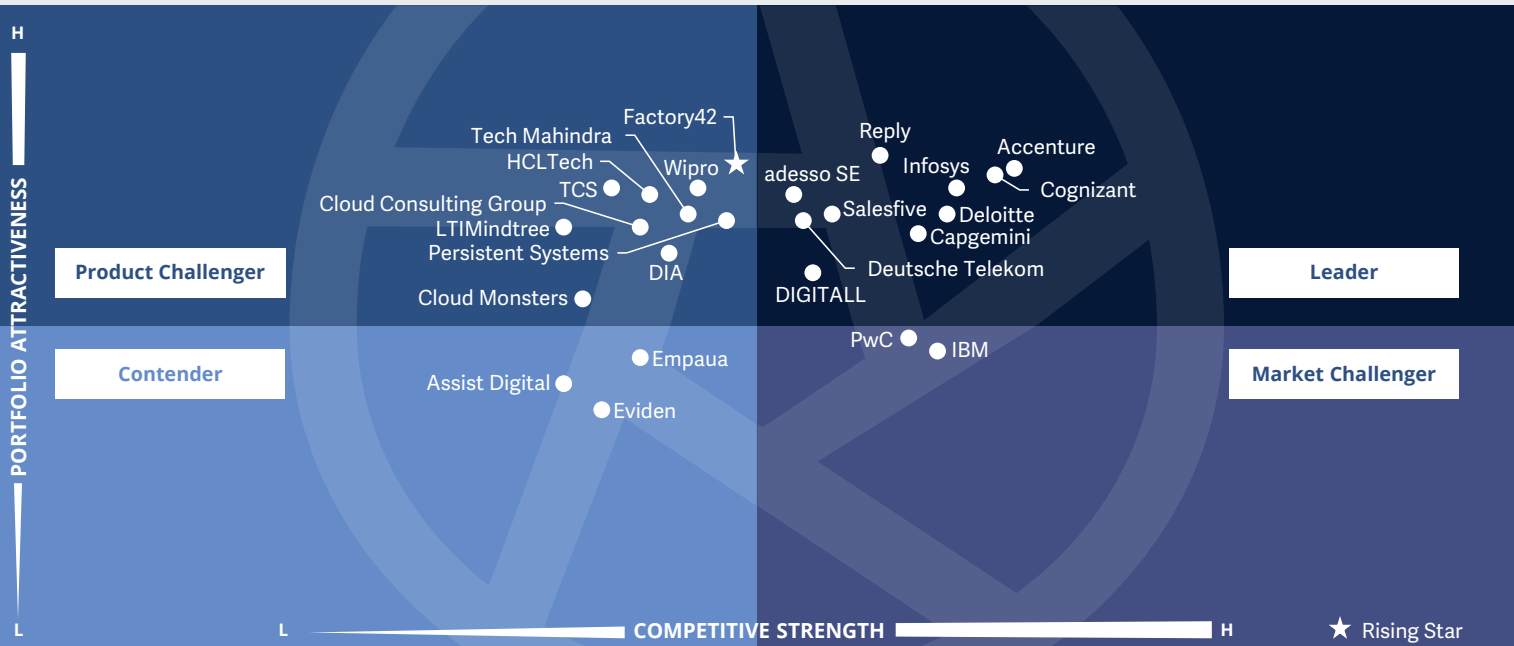


Security and data professionals should read this report to compare providers' practices and understand how they adhere to German security laws for Salesforce integration.



**Salesforce Ecosystem Partners
Implementation Services for Marketing Automation**

Germany 2024



This quadrant addresses providers that offer **implementation services for Salesforce Marketing Automation** and provide **expertise in marketing-related aspects** such as the use of media and the execution of multichannel campaigns.

Rainer Suletzki



Implementation Services for Marketing Automation

Definition

This quadrant examines providers that specialize in the Salesforce Marketing Cloud and cover a wide range of implementation scenarios, from minimal real-time integration into a complex system landscape to more complex projects with the Salesforce Marketing Cloud as the basis for sophisticated e-commerce and omnichannel marketing initiatives. Such scenarios require deep integration into the customer's IT landscape.

Expertise in marketing-specific aspects such as media use and multichannel strategies is of the utmost importance in this quadrant. Integration with end customers often goes hand in hand with a high transaction volume, making process automation a critical success factor.

The implementation services offered include process consulting to optimize marketing strategies, design to customize Salesforce solutions, configuration for seamless performance, data cleansing to improve data quality and data migration for a smooth transition. These services also include go-live support to ensure a successful implementation.

The vendors in this quadrant play a critical role in helping companies realize the potential of the Salesforce Marketing Cloud in both simple implementations and complex, data-intensive omnichannel marketing initiatives. They ensure that the marketing capabilities can achieve the best possible results through efficient fine-tuning in a highly competitive environment.

Eligibility Criteria

1. Strong implementation skills (**consulting, configuration, data migration and go-live**) for Salesforce Marketing Cloud, Pardot and for marketing-specific aspects such as information capture, customer experience, digital customer journey optimization and automation of customer interactions
2. Conducting **training courses and enabling customer personnel** to use the application
3. Availability of **predefined solutions and accelerators**, preferably both function-oriented and industry-specific
4. Presence of **unique selling points**
5. Economic **stability and extensive delivery capacities** to support numerous customers
6. Convincing list of **use cases and references**



Implementation Services for Marketing Automation

Observations

Implementation services for the automation of marketing processes using Salesforce have to consider that most marketing activities involve direct interactions with end users of products and services. This leads to large amounts of data and an increased need for efficient and mobile solutions. Therefore, relevant skills in this area are essential for leading providers in this quadrant. The provider's knowledge of Marketing Cloud Account Engagement (formerly Pardot) is also a critical success factor for this type of implementation.

With their strong industry expertise and experience with Salesforce, some of the large marketing agencies can also be seen as key competitors to the technology-oriented providers in this market. While all global systems integrators offer extensive capabilities in terms of marketing functions, some of the midsize service providers active in the Salesforce implementation market also have considerable expertise in this area. In general, however, the certifications for the corresponding Salesforce products still have the potential for further improvement.

From the 90 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture offers high scalability in its marketing-related implementation projects and, in collaboration with Salesforce, is investing heavily in GenAI to analyze customer-related data.

adesso

adesso uses a development methodology that is specific to marketing functions. In contrast to some competitors, the company relies on project support through predefined solutions in the Marketing Cloud.

Capgemini

Capgemini has extensive experience in implementing solutions for marketing with Salesforce and offers a range of methodologies, assets and capabilities to help organizations engage with their end customers.

cognizant

Cognizant offers predefined solutions for marketing and managed services, such as implementing marketing campaigns. The company strongly focuses on data-oriented services like data modeling and cleansing.

Deloitte.

Deloitte Digital has a strong track record in consulting and implementing solutions for marketing functions in large companies. Its portfolio includes expert services for data-driven marketing strategies.

Deutsche Telekom's service portfolio covers the design and implementation of solutions utilizing Salesforce's marketing components. Additionally, AI methodologies are employed in marketing initiatives.

DIGITALL

DIGITALL robustly supports marketing functions within a company through numerous standardized use cases and corresponding Salesforce implementations. It also has in-depth expertise in customer analytics.

Infosys®

Infosys uses numerous templates with reference architectures specific to marketing functions in its implementations. The company also offers a range of industry-specific solutions for marketing automation.

REPLY

Reply has extensive expertise in using other innovative technologies and implementing the Marketing Cloud. It also offers the implementation of data-driven analyses in marketing.



Implementation Services for Marketing Automation

Salesfive

Salesfive's portfolio includes functionally oriented preconfigured solutions to increase productivity in marketing. It relies heavily on automation solutions in view of the large volumes of data usually involved in marketing.



factory42 (Rising Star) has extensive expertise in designing personalized customer communication. Its portfolio also offers a range of standardized starter packages for getting started with the Marketing Cloud.





“Cognizant has a comprehensive portfolio of Salesforce-related solutions for marketing functions, including numerous predefined solutions.”

Rainer Suletzki

Cognizant

Overview

Cognizant is a global provider of IT services and has increasingly focused on the digital transformation of core business processes in recent years. The implementation of Salesforce has been supported for more than 10 years, covering the entire chain from design to implementation and operational support. It is headquartered in New Jersey, U.S., and employs more than 346,600 people in 147 offices in 50 countries. In FY22 the company generated \$19.4 billion in revenue.

Strengths

Comprehensive portfolio including managed services: Cognizant’s portfolio includes strategic consulting and implementation services for all Salesforce products related to marketing and the corresponding analytics functions using Datorama, Tableau and Google Analytics. In addition, it offers managed services for marketing campaigns and CX development.

Robust predefined solutions: Cognizant offers a range of predefined solutions for marketing, such as Dynamic Reusable Content, a solution for personalized campaigns where content can be dynamically adapted to user behavior and preferences. Other solutions include Campaign Studio and email archiving.

Compelling services for data management:

Marketing functions depend heavily on a consistent and well-managed database. In this context, Cognizant offers robust support for data modeling, data harmonization and cleansing, as well as suitable governance models to optimize the use of the Marketing Cloud in conjunction with the Data Cloud.

Caution

Based on its expertise in data management, Cognizant needs to offer managed services to ensure the permanent assurance of data quality and availability. The preconfigured solutions should be bundled in suitable starter packages.





Managed Application Services for Large Enterprises

Managed Application Services for Large Enterprises

Who Should Read This Section

This quadrant is relevant to large enterprises across all industries in Germany evaluating providers of Salesforce managed application services.

In this quadrant, ISG defines the current market positioning of providers of Salesforce managed application services for large enterprises in Germany. 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 platforms, enterprise clients look for service providers that can keep IT costs under control and maintain the platforms efficiently. They also require service providers to manage their applications, licenses and upgrades, offer user support and develop business applications integrated with the platforms.

Germany-based service providers prioritize boosting AI capabilities for streamlined code interpretation and standardization, expediting teams' full productivity. Managed services evolve from break-fix to continuous enhancements, yielding substantial platform savings and accelerated speed-to-market for large enterprise customers.

Large enterprises in Germany prefer service providers offering implementation, migration, integration, process reengineering, platform services, QA and testing, and support and maintenance services under managed application services.

ISG has observed that service providers support their customers in optimizing Salesforce license costs with consulting services, negotiating, third-party portals and modular licensing.



Marketing and sales leaders should read this report to effectively analyze service partners' capabilities in administration assistance, accelerators, services, proactive monitoring and advisory services.



IT leaders should read this report to better understand the capabilities of managed services providers and compare their technical capabilities in remote and onsite monitoring.



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

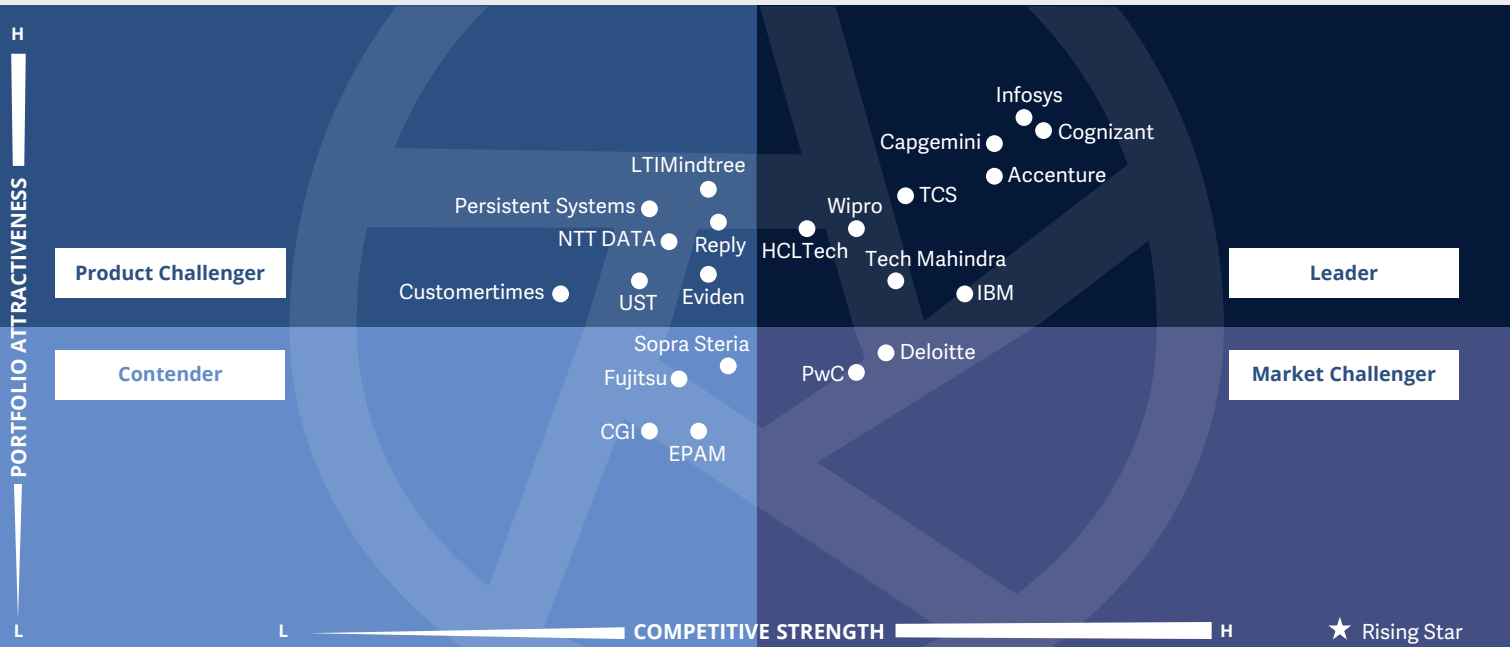


Security and data professionals should read this report to compare providers' practices and understand how they adhere to German security laws for Salesforce integration.



**Salesforce Ecosystem Partners
Managed Application Services for Large Enterprises**

Germany 2024



This quadrant evaluates the ability of service providers to deliver **managed application services** for Salesforce applications for **large global customers** with complex application landscapes.

Rainer Suletzki



Managed Application Services for Large Enterprises

Definition

This quadrant evaluates providers of managed application services for maintenance and support, e.g. continuous monitoring, remote support, centralized management of Salesforce applications, careful data quality management, data security and compliance aspects.

For large enterprises, these managed services are extended to accommodate global coverage and the inherent complexity of application landscapes. Such landscapes often include a variety of solutions from different software vendors, making centralized management and support a challenging but necessary undertaking.

An important focus in this quadrant is continuous improvement and innovation with regard to the solutions offered. The aim is to sustainably increase added value for companies. With these Managed Application Services, the main responsibilities are transferred to the service provider as part of strictly defined SLAs.

Providers in this quadrant form the backbone of Salesforce operations in large enterprises, ensuring not only the continuous operation of essential functions, but also greater business value. At the same time, they are responsible for maintaining data integrity, security and regulatory compliance across the customer's complex, global landscape.

Eligibility Criteria

1. Proven experience in operational support of end-to-end processes across **complex application landscapes** with a particular focus on Salesforce products
2. Availability of a **solid methodology** and comprehensive tool support with a high degree of automation
3. Scalable **delivery capacities** for supporting large corporate customers
4. Provision of **sophisticated pricing and contract models** with a focus on results-oriented approaches and continuous improvement
5. Convincing list of **use cases and references**



Managed Application Services for Large Enterprises

Observations

Similar to implementation services for large enterprises, the coverage of integration requirements within sophisticated application landscapes is an important keycapability for managed application services providers. As a result, large systems integrators dominate this market as they can typically support end-to-end processes across multiple software packages. These end-to-end capabilities should also include the diverse range of ISV products large enterprises use for functionalities not included in the standard Salesforce offerings. In the past, such services often focused on reducing costs by increasing efficiency in IT operations. However, customers need to optimize the underlying business processes to achieve additional value beyond technology-driven aspects. Another aspect is that many customers consider their Salesforce license costs quite high. This is reflected in the high demand for consulting services to optimize license usage and reduce the associated costs.

From the 90 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders.



Accenture offers a global delivery model with a balanced cost structure, a strong market presence in Germany and a comprehensive library of tools to increase productivity when managing Salesforce instances.



Capgemini's offering includes a comprehensive methodology for the operation of applications, including associated tool support. It also supports clients with comprehensive service integration and management (SIAM) services.



Cognizant's portfolio includes numerous tools specially developed for the application management of Salesforce instances. It also offers services to optimize the licenses used.

HCLTech

HCLTech uses a self-developed framework to operate complex application landscapes, enabling cost-effective and efficient services. It also offers various services in an as-a-service model.



IBM has numerous delivery centers in all relevant regions and, thus, offers a powerful global delivery model. Its portfolio offers a variety of productivity-enhancing tools that support efficient application management.



Infosys' portfolio offers many tools that support efficient application management. Robust automation tools are used in managed application services to achieve high stability in business processes.



TCS' global delivery model combines a dedicated onshore and nearshore presence in many countries with remarkable offshore capabilities. Its commercial model offers various options for outcome-based pricing.



Tech Mahindra's Salesforce application management model is designed as an as-a-service model, offering support and maintenance at flexible prices. The support model can also be extended to using solutions offered by ISVs.



Wipro's portfolio focuses on the provision of suitable tools to increase efficiency. The company also supports customers' data management with sophisticated methods for data engineering and data lifecycle management.





“Cognizant is a highly competent provider of managed application services related to Salesforce with comprehensive support and automation tools.”

Rainer Suletzki

Cognizant

Overview

Cognizant is a global provider of IT services and has increasingly focused on the digital transformation of core business processes in recent years. The implementation of Salesforce has been supported for more than 10 years, covering the entire chain from design to implementation and operational support. It is headquartered in New Jersey, U.S., and employs more than 346,600 people in 147 offices in 50 countries. In FY22 the company generated \$19.4 billion in revenue.

Strengths

Efficient global delivery model: Cognizant operates delivery centers in several countries and has recently expanded its onshore presence in Germany.

Comprehensive support tools with a focus on automation: Its portfolio includes numerous tools that have been specially developed for the application management of Salesforce instances. The focus here is on automating various activities to achieve highly cost-efficient operation.

License optimization support: Cognizant offers various services to help Salesforce customers optimize their license volume and the associated costs.

Data quality to ensure service stability:

The powerful tools already used during implementation to ensure data quality are also used during ongoing operations. Cognizant also offers tools for continuously monitoring data quality and, thus, provide sustainable support for efficient application operation. Recently, GenAI methods have also been used in this context to increase both efficiency and quality further.

Caution

Cognizant should make better leverage its technological expertise to improve clients' underlying business processes. Its portfolio should better emphasize end-to-end process support across various platforms such as SAP or ServiceNow.





Managed Application Services for Midmarket

Managed Application Services for Midmarket

Who Should Read This Section

This quadrant is relevant to small and midsize enterprises across all industries in Germany evaluating providers of Salesforce managed application services.

In this quadrant, ISG defines the current market positioning of Salesforce managed application service providers for small and midsize companies in Germany. 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.

Enterprises in Germany seek service providers that can provide licenses with project implementation and subsequent operation as a combined full-service offering. Service providers offer highly flexible and cost-effective models to address this and support the ongoing operation of Salesforce applications.

German service providers are enhancing onsite, onshore, nearshore and offshore capabilities and technical, functional and industry expertise to offer enterprises comprehensive and expanded possibilities for cost optimization.



IT leaders should read this report to compare providers' technical expertise, including monitoring, accelerators, incident response, automation and development methodologies.



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



Marketing and sales leaders should read this report to effectively analyze service providers' capabilities in implementing Salesforce managed application services, highlighting advanced managed service capabilities.

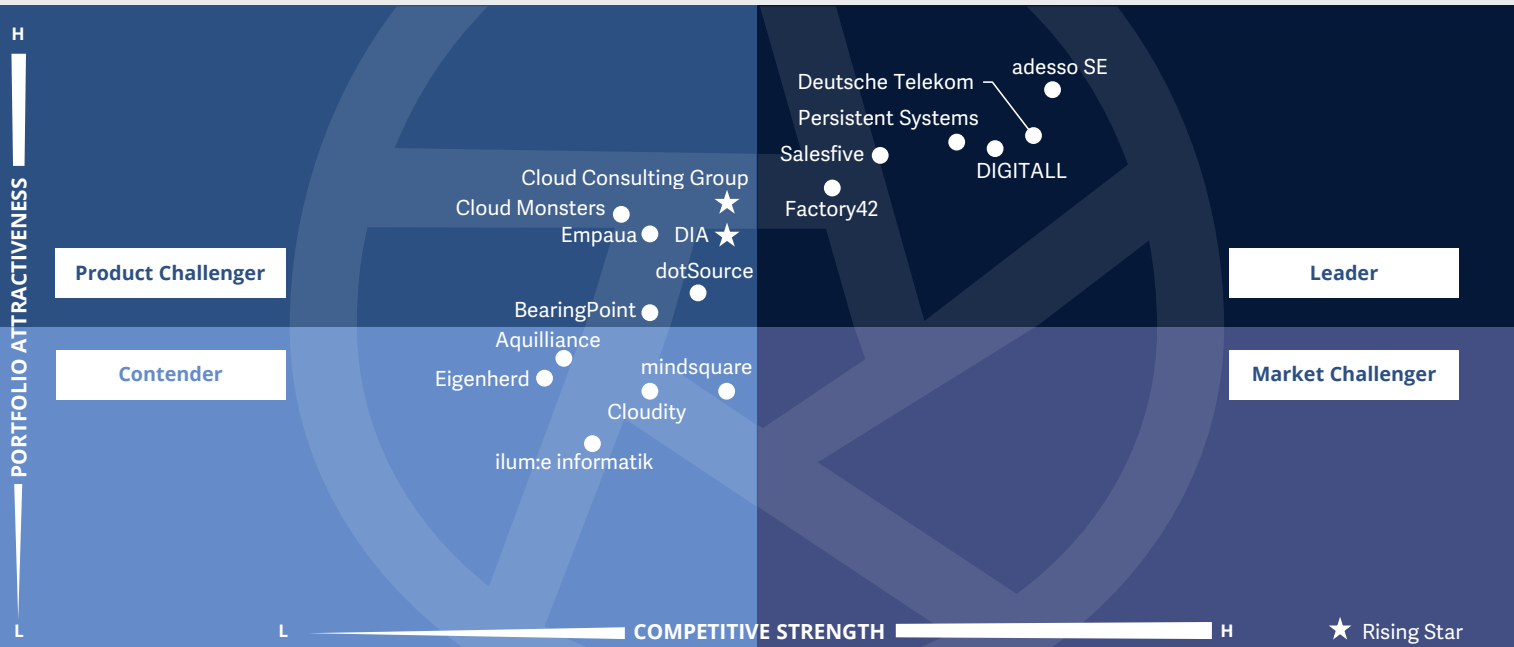


Security and data professionals should read this report to compare providers' practices and understand how they adhere to German security laws for Salesforce integration.



**Salesforce Ecosystem Partners
Managed Application Services for Midmarket**

Germany 2024



This quadrant addresses providers that offer **managed services** to maintain and support Salesforce applications for **midsize enterprises**. This includes services as well as aspects of **data security and compliance**.

Rainer Suletzki



Managed Application Services for Midmarket

Definition

This quadrant focuses on vendors' ability to provide managed application services that include key maintenance and support functions covering a comprehensive range of services, including monitoring, remote support, centralized Salesforce application management, data quality management, data security and compliance.

Medium-sized customers often have lower integration requirements and also often operate in a specific region. They need strong regional support, and the providers in this quadrant are able to meet these requirements.

A key aspect in this quadrant is the continuous improvement of the solutions offered. Providers are constantly striving to improve their services and introduce innovations in order to create added value for their customers. Constant improvements and adjustments are crucial in a rapidly evolving environment.

Managed Application Services are characterized by the fact that important tasks are transferred to a special service provider. These services are offered within the framework of precisely defined SLAs, which ensure that the customer's expectations are always met or exceeded.

The providers in this quadrant have a regional focus in particular and offer tailored support for medium-sized customers; at the same time, they take care of the complex Salesforce applications, data quality and compliance requirements. These factors contribute to the continuous growth and business success of their customers.

Eligibility Criteria

1. Proven experience in **operational support of application landscapes** with a particular focus on Salesforce products
2. Availability of a **solid methodology and comprehensive tool support** with a high degree of automation
3. **Economic stability and extensive delivery capacities** to support numerous customers
4. Provision of **sophisticated pricing and contract models** with a focus on results-oriented approaches and continuous improvement
5. Convincing list of **use cases and references**



Managed Application Services for Midmarket

Observations

From a functional perspective, managed application services for SaaS products such as Salesforce are less complex than conventional on-premises products. One of the reasons for this is that Salesforce handles a significant part of application management. While Salesforce oversees all platform-related aspects such as database management or performance management, service providers offer support with upgrades, data volume and license management, user training, and, if required, the management of various interfaces. Owing to this narrower scope, some midsize providers prioritize implementation services over managed application services. In contrast to the large enterprise segment, the demand for end-to-end processes across platforms is somewhat less critical for midsize customers, as their application environments are often less complex.

From the 90 companies assessed for this study, 18 qualified for this quadrant, with six being Leaders and two Rising Stars.



adesso offers a support model that focuses on customer proximity and quality. Consequently, the services are provided from a location within Germany. The company attaches great importance to achieving measurable value contributions in operations.



Deutsche Telekom offers a flexible model for supporting the ongoing operation of Salesforce applications, including support for process chains across all Salesforce products, which is particularly suitable for cost optimization.



DIGITALL's portfolio is modular, whereby the customer can flexibly put together the specific service agreement themselves. The pricing model enables the agreement of a predominantly fixed price-based application support.



factory42 offers application support for Salesforce-based applications based on a well-structured catalog. Its portfolio also includes a comprehensive range of services for the qualification and enablement of employees on the customer side.



Persistent Systems' managed application services include all relevant components with the option to choose service delivery by dedicated teams. Persistent Systems consistently relies on automation to increase efficiency.



Salesfive's portfolio offers a full range of support services, including links to back-end systems. The company provides fixed response times that are bindingly agreed upon with the customer.

Cloud Consulting Group

Cloud Consulting Group's (Rising Star) portfolio offers customers flexible service models and convincing post-deployment optimization. As a result of the merger with Mindcurv, the company has considerable potential for future growth.

DIA

DIA (Rising Star) offers a comprehensive portfolio of managed application services in which project and operation are often skillfully combined in long-term customer engagements. The company also attaches great importance to training clients' employees.





Implementation Services for Industry Clouds

Implementation Services for Industry Clouds

Who Should Read This Section

This report is relevant to enterprises across all industries in Germany evaluating service providers that offer implementation services for industry clouds. In this quadrant, ISG defines the current market positioning of the service providers in Germany and identifies how they address the key challenges associated with implementing industry clouds for Salesforce products.

This quadrant includes providers of implementation services focusing 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 quadrant. Service providers also require the capability to develop comprehensive solutions based on the various Salesforce products 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 go-live support. Optimization of license costs is an additional critical success factor in this context.

In Germany, there is a high demand for Salesforce industry cloud solutions that require minimal or a few customizations. Considering this, service providers are increasingly automating industry-specific cloud solutions to facilitate deployment with minimal customization. German enterprises also prioritize implementation services for industry clouds, which include managing, developing and optimizing third-party systems to achieve specific business goals.



Field service managers should read this report to understand how service providers implement and expand the Salesforce industry cloud use to better manage field service operations.



Security and data professionals should read this report to compare providers' practices and understand how they adhere to German security laws for Salesforce integration.



IT leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce industry cloud services and integration and analysis solutions.

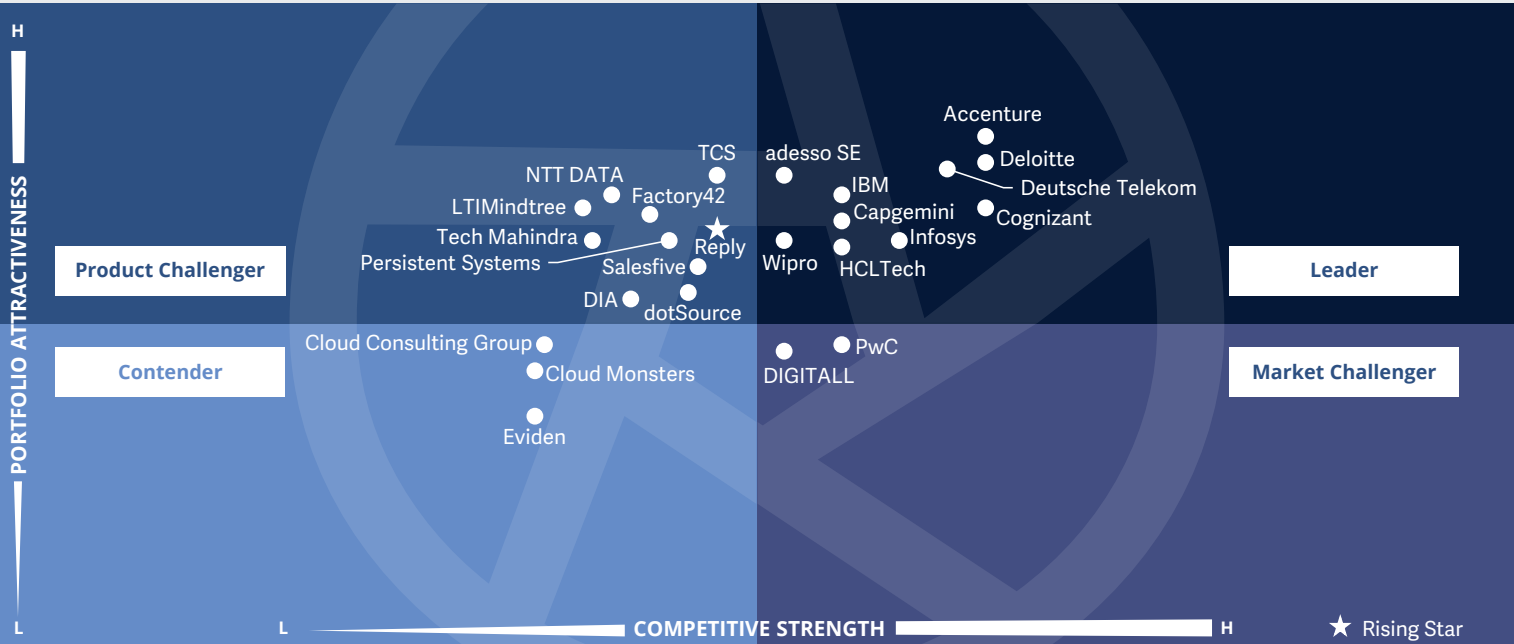


Marketing and sales leaders should read this report to effectively analyze service partners' capabilities around the industry cloud.



**Salesforce Ecosystem Partners
Implementation Services for Industry Clouds**

Germany 2024



This quadrant analyzes implementation service providers geared toward **Salesforce industry clouds**. Industry-specific skills and suitable tools are key success factors in this quadrant.

Rainer Suletzki



Implementation Services for Industry Clouds

Definition

This quadrant evaluates vendors that offer implementation services tailored to Salesforce's Industry Cloud products. These industry-specific offerings, such as the Financial Services Cloud and the Health Cloud, require special skills and corresponding accelerators for a successful implementation. For providers in this segment, a deep understanding of the particularities of these specific industries is essential.

The ability to develop holistic solutions through the seamless integration of various Salesforce products also plays a key role here. This enables providers to develop comprehensive, customized solutions that are precisely tailored to the individual needs of each customer. Salesforce is now strategically pursuing greater verticalization, which underscores the growing importance of this capability and makes it a top priority for new implementations.

Functionally, the implementation services include process consulting to optimize workflows, design to build customized solutions, configuration for seamless system performance, data cleansing to improve data quality, data migration for a smooth transition and go-live support for the successful implementation of these specialized Industry Cloud solutions.

The vendors in this quadrant play an important role in ensuring that companies in specific industries can realize the full potential of Salesforce's Industry Cloud products. Thanks to their industry-specific expertise and ability to integrate multiple Salesforce offerings, companies can efficiently overcome industry-specific challenges and gain a competitive advantage in their respective fields.

Eligibility Criteria

1. Proven **expertise** for the respective industries
2. Strong implementation skills (**consulting, configuration, data migration, go-live**) for Vlocity's Salesforce Industry Cloud products (acquired from Salesforce)
3. Sound knowledge of the **Salesforce data architecture**
4. Existence of **unique selling points**, e.g. proven industry-specific accelerators
5. **Economic stability and extensive delivery capacities** to support numerous customers
6. Convincing list of **use cases and references**



Implementation Services for Industry Clouds

Observations

The market for Salesforce implementations is amid a significant transformation driven by Salesforce's recent verticalization strategy. This initiative began several years ago with the launch of industry-specific products such as the Financial Services Cloud and Health Cloud. With the acquisition of Vlocity, these capabilities have become the core elements for Salesforce's development of industry-specific offerings. This market is still relatively new, with only a few customers adopting this new approach. The general acceptance of this transformation remains to be seen, as it brings additional license requirements and associated costs. Nevertheless, service providers must invest significantly in industry knowledge and Salesforce's relevant products. For transformation projects, it is also crucial to conduct a comprehensive assessment in advance to determine which products best suit each customer's specific situation.

From the 90 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture offers a variety of industry cloud solutions and has already gained a range of real-life experiences. The relevant integration aspects in the context of industry clouds are covered competently.

adesso

adesso has extensive experience in implementing Salesforce in a range of industries. It also offers customer proximity and high cost efficiency through a delivery model that includes significant nearshore capabilities, in addition to onshore presence.

Capgemini

Capgemini combines extensive experience in industry-specific CRM implementation with a strong content expertise for various industries. The company has already achieved expert-level certification for many industry clouds.

cognizant

Cognizant has extensive experience in industry-specific solutions based on the Salesforce platform. It also has a long-standing partnership with Salesforce, which includes collaboration on the product development of industry clouds.

Deloitte.

Deloitte Digital has primarily organized its consulting and implementation capacities by industry and has extensive expertise in industry-specific business processes and their support through IT.

T

Deutsche Telekom has been emphasizing preconfigured multicloud solutions with an industry focus for some time now. The company is already investing remarkably in using industry clouds, which are still relatively new.

HCLTech

HCLTech has many years of experience in various industries and is represented on Salesforce's Program Boards for several industry clouds.

IBM

IBM has an industry-oriented portfolio and broad content expertise for numerous industries. A range of predefined solutions is offered to these industries, along with its innovative technologies.

Infosys

Infosys combines compelling industry-specific offerings with a powerful global delivery model. The provider maintains partnerships with ISVs, a key aspect in the context of industry clouds.



Implementation Services for Industry Clouds



Wipro's portfolio is characterized by a combination of functional expertise and industry know-how. Based on this, the company offers a range of sophisticated industry solutions.



Reply (Rising Star) organizes the offerings around the Salesforce platform, with a focus on several key industries. It has carried out many demanding implementations in these sectors in recent years and can, therefore, refer to broad industry experience.





“Cognizant is an excellent implementation partner for the Salesforce industry cloud, and it has distinctive content expertise for numerous industries.”

Rainer Suletzki

Cognizant

Overview

Cognizant is a global provider of IT services and has increasingly focused on the digital transformation of core business processes in recent years. The implementation of Salesforce has been supported for more than 10 years, covering the entire chain from design to implementation and operational support. It is headquartered in New Jersey, U.S., and employs more than 346,600 people in 147 offices in 50 countries. In FY22 the company generated \$19.4 billion in revenue.

Strengths

Robust pre-built solutions for various industries: Cognizant has extensive experience in delivering industry-specific solutions based on the Salesforce platform. A prime example is the robust solutions for life sciences and medtech, where the company combines strong content expertise with compelling technology capabilities. This industry-specific experience provides a solid foundation to support clients in potentially transitioning to Salesforce industry clouds.

Award for innovation: Cognizant was honored with the 2022 Partner Innovation Award for industry clouds implementation for Fortune 500 Insurance.

Close partnership with Salesforce:

Cognizant has a long-standing partnership with Salesforce, which also includes collaboration on the product development of industry clouds. The company is a Salesforce launch partner for several of these products.


Broad network of add-on providers:

Cognizant has numerous partnerships with ISVs that offer solutions to extend the standard Salesforce products, including some with a specific focus on industries such as financial services.

Caution

Cognizant should continue to expand its consulting services to help customers decide between traditional functional clouds and industry clouds. The positioning of its industry-specific products should also be clarified.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Customer Experience (CX) Insights

Source: ISG Star of Excellence™ research program, Insights till January 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Salesforce Ecosystem Partners**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Industry Average CX Score



▲ Highest CX: 92

▼ Lowest CX: 60

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 380

Client Business Role

- ▲ **Most satisfied**
Information Technology
- ▼ **Least satisfied**
Human Resources

Region

- ▲ **Most satisfied**
Australia/New Zealand
- ▼ **Least satisfied**
Asia

Industry

- ▲ **Most satisfied**
Public sector
- ▼ **Least satisfied**
Oil and Gas

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	53.4%
Nearshore	19.1%
Offshore	27.5%





Appendix

The ISG Provider Lens 2024 - Salesforce Ecosystem Partners study analyzes the relevant software vendors/service providers in the German market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of February 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



Author & Editor Biographies

Lead Author



Rainer Suletzki
Lead Analyst

Rainer Suletzki has more than 30 years of experience in various IT management functions in a global German life science company. His focus is on IT application management, IT architecture, data modeling and IT sourcing strategy and implementation. He is currently working as an independent consultant in various projects at ISG, focusing on application management for SAP, especially for SAP HANA, and for Salesforce.

These include ISG Provider Lens™ studies as well as various projects to support companies in defining IT strategies and the corresponding sourcing decisions.

Enterprise Context & Global Overview Analyst



Puranjeet Kumar
Senior Research Analyst

Puranjeet Kumar is a Senior Research Analyst at ISG and is responsible for supporting and contributing to Provider Lens™ studies on Next-Gen ADM Solutions & Services and Salesforce Ecosystem. He supports the senior analysts in the research process and writes the Global Summary Report. Puranjeet also develops content from an enterprise perspective and works with consultants and enterprise clients on ad hoc research assignments.

He has previously worked for several market research companies and has more than eight years of experience in market research and consulting, with a focus on collecting, analyzing and processing quantitative and qualitative data. His expertise covers various technologies such as application development, analytics and Salesforce.





Study Sponsor

Aman Munglani
Director and Principal Analyst

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies.

In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.



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™

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For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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