ISG Provider Lens™

Salesforce Ecosystem Partners

A research report comparing provider strengths and advantages of Salesforce Partners

Customized report courtesy of:

cognizant

QUADRANT REPORT | MARCH 2024 | U.K.

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2023 marked a period of noteworthy developments with Salesforce and ecosystem partners in the U.K.

2023 was a dynamic year for partners in the Salesforce ecosystem. The return of inflation and the corresponding central bank's remedy to increase the interest rates led to a stagnant economy in the U.K., with similar effects in all major economies worldwide.

The technology sector was quick to react, and major players in this segment, from hyperscalers to technology vendors, announced a series of layoffs. Salesforce was not immune and executed its plans to reduce the workforce by 10 percent. It also experienced changes at the C level, including the departure of the co-CEO and a reshuffling of the senior leadership team members.

Subsequently, the world witnessed a surge in the adoption of ChatGPT and the emergence of other large language models (LLMs), particularly those developed by Alphabet and Meta.

The rapid adoption rate and the capabilities of ChatGPT and similar tools took the corporate world by surprise. C-suite executives were forced to think of the implications of AI and artificial general intelligence on their businesses and how to best capitalise on this opportunity. Two immediate reactions were observed. One was to review existing plans and make public announcements to reduce hiring ambitions or streamline the workforce, given AI's ability to increase companies' efficiency. The other involved substantial investment plans in AI in the coming years.

The response from Salesforce was nothing short of exceptional. While many industry analysts apprehended that Salesforce would regroup and focus on executing the plans from the preceding year, Salesforce understood this was an inflection point in the technology history that required a strategic response. By the end of the first quarter in 2023, Salesforce announced integrations with OpenAI and its plans to launch Einstein generative pre-trained transformers (GPT). By the middle of last year, Mark Benioff and the executive team had already devised a coherent strategy and were actively

Salesforce's **ability to innovate** is remarkable, as is the **ecosystem partners' ability to adapt** repositioning Salesforce to be the company of AI + Data + CRM + Trust, with a careful choice in the sequence of terms to ensure that AI and Data were not considered secondary to CRM. Characteristic to Salesforce, the company's words were followed by actions with the launch of Data Cloud; it also aggressively pushed this area for accelerated growth. This series of activities culminated at Dreamforce in September 2023, where it announced a comprehensive suite of tools and roadmaps.

In our conversations with Salesforce partners, several topics are featured repeatedly and described in the following paragraphs.

With the recent Dreamforce announcements, partners' activity in the data and AI space was a prominent subject of discussion. Regarding data, discussions revolved around enterprises deciding between Salesforce Data Cloud and data lakehouse platforms such as Snowflake and Databricks for data storage. Partners acknowledged Salesforce's strategy in restricting the complimentary use of Data Cloud and providing connectors to Snowflake and Databricks. They also agreed on the maturity and functionality richness of Salesforce Data Cloud, given its origins in the Marketing Cloud suite. However, they debated Salesforce's approach to AI, especially Generative AI (GenAI). While some perceived the AI + Trust concept and bring-your-own-model approach as visionary, others were more sceptical, deeming it a novelty that attracted attention but still awaited enterprise maturity for rapid adoption.

Partners also reviewed the progress of industry cloud deployment in the marketplace, given Salesforce's continued emphasis on this area. They noted two predominant types of industry clouds: firstly, the mature offerings that resulted from the Vlocity acquisition and the longstanding industry clouds from Salesforce, and secondly, the emergent industry clouds. Some partners described the emergent industry clouds as akin to a white canvas with a robust data model and an ambitious roadmap but lacking readily available client-required functionalities. Other partners were committed to building industry solutions bundles independently by incorporating Salesforce industry cloud components as needed for specific vertical use cases. Partners also debated the suitability of industry clouds versus multicloud integration for addressing client needs. They concluded that industry clouds are well-suited for speed to market, particularly in green field implementations, while multicloud solutions are optimal for brownfield implementations requiring specific functionality. All partners agreed that industry clouds are relatively more expensive than multicloud solutions, emphasising the importance of demonstrating tangible benefits to clients considering this route.

Another topic of discussion revolved around concerns about licencing complexity and the perception of over-licencing. Clients were increasingly seeking licence optimisation services due to the economic slowdown. Salesforce demonstrated flexibility in collaborating with partners to explore licence swaps between products and similar approaches to optimise license allocation, allowing customers to enhance functionality in specific areas. However, the return of licences was viewed as unrealistic by a majority of partners. They believed that improving adoption and extracting more value from the platform are preferred approaches to addressing the issue.

Finally, many partners explored Salesforce's ambitious goal of expanding revenues from $30 billion to $50 billion in the coming years. They discovered two primary avenues to contribute to this goal. While some planned to focus more on regions that lacked substantial Salesforce penetration, with many eyeing Asian emerging economies as areas for growth, others identified the challenge of selling to the IT function within companies and suggested targeting other functions such as marketing, commercial and operations as potential growth avenues. However, the latter approach requires a shift from focusing on technology and features to highlighting use cases and benefits.

In the following paragraphs, we summarise our findings per quadrant.

Multicloud integration and implementation services are vital for Salesforce as enterprises focus on technology for a competitive edge. Migration to the cloud, big data and digital transformation are foundational, with AI transformation and streamlined data management emerging as the next frontiers for large enterprises in the U.K. LTIMindtree moved from Leader in last year's assessment to a Product Challenger this year, while others maintained their Leader status with slight variations in Portfolio Attractiveness and Market Strength. With an increase in the number of Salesforce partners evaluated from 19 to 25, the number of Leaders in the quadrant also expanded. Globant, ranked as a Rising Star last year, met the criteria to be a Leader, and TCS and Capgemini also secured leadership positions this year.

Participants in the Implementation Services for Core Clouds—Midmarket quadrant have fewer than 500 global Salesforce-certified experts, with less than 150 in the U.K. The quadrant comprises smaller U.K.-centric partners that recorded rapid growth between 2022 and 2023, subsidiaries of international partners with 300 to 500 global experts prioritising the U.K. and the US, and regional players with a strong presence in the U.K. Three U.K.-focused companies, Sabio Salesforce Practice (formerly makepositive), Credera (previously BrightGen) and Pracedo, underwent ownership changes and are poised for growth globally. BearingPoint strengthened its U.K. presence with the acquisition of Smplicity. In this quadrant, Leaders focused on selected segments, offering a set of Salesforce products without always being all-encompassing. Their solutions typically involve one or two core clouds and do not require complex integrations. Compared to last year, VRP Consulting, Coforge, Pracedo and Zensar moved to Leader positions, while CGI and Persistent Systems have not been assessed in this quadrant as they are now assessed in the Multicloud Integration and Implementation Services quadrant.

The Implementation Services for Marketing Automation quadrant includes partners targeting both large and midmarket enterprises. Leaders in this segment, primarily focusing on large enterprises, leverage their scale and expertise in sophisticated solutions, often cross-selling marketing automation to their existing clients. They consistently excel in leveraging customer data for personalised experiences, providing consulting services for effective marketing strategies and delivering solutions that enhance loyalty, conversion rates and customer lifetime value.

Companies in the Managed Application Services quadrant — Large Enterprises, a subset of multicloud implementation and integration providers, all have a global presence with over 700 certified experts. Leaders in this quadrant use diverse methodologies and tools, emphasising proprietary assets for streamlined processes and efficiency. They prioritise AI and automation and often adopt a DevOps framework, with the new trend focusing on CX over service levels. This year, the number of Leaders increased from six to seven. LTIMindtree moved to become a Product Challenger, while TCS and Capgemini advanced to Leader status based on innovation and market appeal metrics.

Companies in the Managed Application Services — Midmarket quadrant often handle initial implementations and maintain long-term relationships through managed application services. Leaders emphasise streamlined managed services tailored to customer needs, employing hybrid delivery models with local, nearshore and offshore resources. Flexible pricing models, combining flat fees and effort-based pricing, are prevalent. Partners structure offerings with core services and expandable modules, defining tiers based on factors such as availability, region, language, and expert access. While using various methodologies and tools for managed application services is common, the level of automation and adoption of DevOps vary among partners, with room for growth in the coming years. Compared with last year, Coforge transitioned from a Leader position to a Product Challenger role. Meanwhile, BearingPoint, assessed for the U.K. region this year, demonstrated Competitive Strength and Portfolio Attractiveness, securing a Leader position. Although there were some shifts in relative positions among Leaders, these were insignificant.

In the Implementation Services for Industry Clouds quadrant, some companies leverage longstanding partnerships with Vlocity to develop targeted proprietary assets for specific vertical-related use cases, adopting a micro-segmentation strategy. Others build robust industry cloud capabilities with multiple technologies and use this know-how to extend Salesforce industry cloud solutions. Some partners have seized the opportunity to co-develop industry clouds such as Automotive or Life Sciences, collaborating closely with

Salesforce while adding their proprietary assets. These strategies are not exclusive, and various permutations are observed in the partner ecosystem. The Leaders from last year have retained their status this year, but their relative standings have changed due to market success and the pace of innovation resulting from implementing the mentioned strategies. With a larger pool of companies considered in this quadrant, TCS and Deloitte Digital have secured Leader positions. Furthermore, PwC has enhanced its Portfolio Attractiveness and earned recognition as a Rising Star this year.

The U.K. market is a vibrant space for Salesforce ecosystem partners. Competition, though fierce, is a powerful motivator for these players to continue to innovate and explore new avenues, increasing the presence and reach of Salesforce within companies based in this market.

During 2023, Salesforce launched a cohesive proposition for AI + Data + CRM + Trust and continued to drive the industry cloud business. Some partners focusing on large enterprises in the U.K. continued to innovate while helping clients extract the most value from their Salesforce implementation. Smaller partners grew rapidly in the midmarket, and acquisition integrations helped midmarket practices gain scale and scope.

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	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
Alscient	Not In	Market Challenger	Not In	Not In	Contender	Not In
Atlantic Technologies	Not In	Contender	Not In	Not In	Not In	Not In
BearingPoint	Not In	Leader	Contender	Not In	Leader	Not In
Bluewave	Not In	Contender	Not In	Not In	Not In	Not In
Capgemini	Leader	Not In	Leader	Leader	Not In	Leader
CGI	Product Challenger	Not In	Not In	Not In	Not In	Not In
Cloobees	Not In	Contender	Not In	Not In	Contender	Not In
Cloud Orca	Not In	Market Challenger	Not In	Not In	Not In	Not In
Coforge	Not In	Leader	Not In	Not In	Product Challenger	Contender

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	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Cognizant	Leader	Not In	Leader	Leader	Not In	Leader
Concentrix	Not In	Product Challenger	Not In	Not In	Not In	Not In
Credera	Not In	Leader	Leader	Not In	Market Challenger	Not In
Deloitte	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Leader
Devoteam	Not In	Product Challenger	Not In	Not In	Not In	Not In
Dotsquares	Not In	Market Challenger	Not In	Not In	Not In	Not In
DXC Technology	Contender	Not In	Not In	Not In	Not In	Not In
EPAM	Product Challenger	Not In	Contender	Contender	Not In	Not In
Eviden	Contender	Not In	Contender	Contender	Not In	Contender
Globant	Leader	Not In	Leader	Market Challenger	Not In	Product Challenger

Provider Positioning

	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
HCLTech	Leader	Not In	Not In	Leader	Not In	Product Challenger
Hexaware	Not In	Leader	Not In	Not In	Leader	Product Challenger
IBM	Leader	Not In	Leader	Not In	Not In	Leader
Infosys	Leader	Not In	Leader	Leader	Not In	Leader
KPMG	Contender	Not In	Not In	Not In	Not In	Not In
LTIMindtree	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Contender
Merkle	Contender	Not In	Contender	Not In	Not In	Not In
Nebula Consulting	Not In	Market Challenger	Not In	Not In	Not In	Not In
NTT DATA	Product Challenger	Not In	Not In	Contender	Not In	Product Challenger
OSF Digital	Rising Star ★	Not In	Market Challenger	Market 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	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Persistent Systems	Product Challenger	Not In	Market Challenger	Not In	Not In	Product Challenger
Pracedo	Not In	Leader	Not In	Not In	Product Challenger	Not In
Publicis Sapient	Contender	Not In	Product Challenger	Not In	Not In	Not In
PwC	Leader	Not In	Leader	Product Challenger	Not In	Rising Star ★
R3 Digital	Not In	Contender	Not In	Not In	Not In	Not In
Reply	Not In	Leader	Contender	Not In	Leader	Product Challenger
Sabio Group	Not In	Leader	Not In	Not In	Leader	Not In
Silver Softworks	Not In	Market Challenger	Not In	Not In	Contender	Not In
Slalom	Product Challenger	Not In	Not In	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Leader	Not In	Leader

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	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Tech Mahindra	Rising Star ★	Not In	Not In	Product Challenger	Not In	Product Challenger
ThirdEye Consulting	Not In	Contender	Not In	Not In	Contender	Not In
UST	Not In	Rising Star ★	Not In	Not In	Not In	Contender
Valtech	Not In	Product Challenger	Contender	Not In	Not In	Not In
VASS	Not In	Rising Star ★	Contender	Not In	Not In	Not In
VRP Consulting	Not In	Leader	Contender	Not In	Not In	Not In
Westbrook International	Not In	Contender	Not In	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Leader	Not In	Leader
WPP	Contender	Not In	Contender	Not In	Not In	Not In
Zensar	Not In	Leader	Not In	Not In	Leader	Not In

Key focus areas for Salesforce Ecosystem Partners 2024.

- **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**

Simplified Illustration; Source: ISG 2024

Definition

The Salesforce Ecosystem study examines various offerings of the Salesforce platform, categorised into implementation services (the change business) and managed application services focusing on operational support for productive applications (the run business). Based on the clients they cater to, these segments have been further categorised into large enterprises and the midmarket. This categorisation is particularly significant due to the substantial demand for Salesforce integration into the complex application landscape of large enterprises. Furthermore, large enterprises primarily have globally operating businesses that require corresponding delivery capabilities from service providers.

Expanding on the segmentation outlined above, the study also includes quadrants examining focused offerings, which are the sweet spot for a large pool of participants within the ecosystem and are sought after by clients.

As a yearly investigation, running for the sixth consecutive year, the study is constantly updated to analyse Salesforce's year-over-year innovations. This sometimes results in adjustments to existing quadrants or the replacement of a quadrant with a new and more relevant topic. For example, the Implementation Services for Industry Clouds quadrant was introduced last year. The study's updates also allow us to adapt our examination of existing quadrants, incorporating innovation that Salesforce introduces to improve its cloud offerings. This year, Salesforce has renewed emphasis on data, generative AI (GenAI) and trust across its entire portfolio that we considered in our analysis.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following six quadrants for services/solutions: 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.

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

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

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.

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.

- **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.

Multicloud Implementation and Integration Services for Large Enterprises

Who Should Read This Section

This quadrant is relevant to large enterprises of all industries in the U.K. evaluating Salesforce multicloud implementation and integration service providers.

In the report, ISG highlights these service providers' current market positioning. It also discusses how they address the critical challenges faced by large regional enterprises that have adopted various cloud products from the Salesforce portfolio.

Over the years, Salesforce has expanded its product strategy beyond CRM applications to related applications, developments, integrations and reporting. ISG predicts an increase in the demand for implementation and integration services for Salesforce cloud solutions and their peripheral tools.

In the U.K., large enterprises operating in multiple regions prefer service providers with industry expertise and competence in data and the entire Salesforce cloud suite. They prefer providers with proven skills in integrating complex environments, including well-known ERP, human resource management and finance management platforms, to streamline integration and maximise the benefits of the entire suite. Enterprises seek guidance from service providers throughout the project lifecycle, from strategy to post-implementation, and use hybrid agile methodology to create cutting-edge customer and employee experiences.

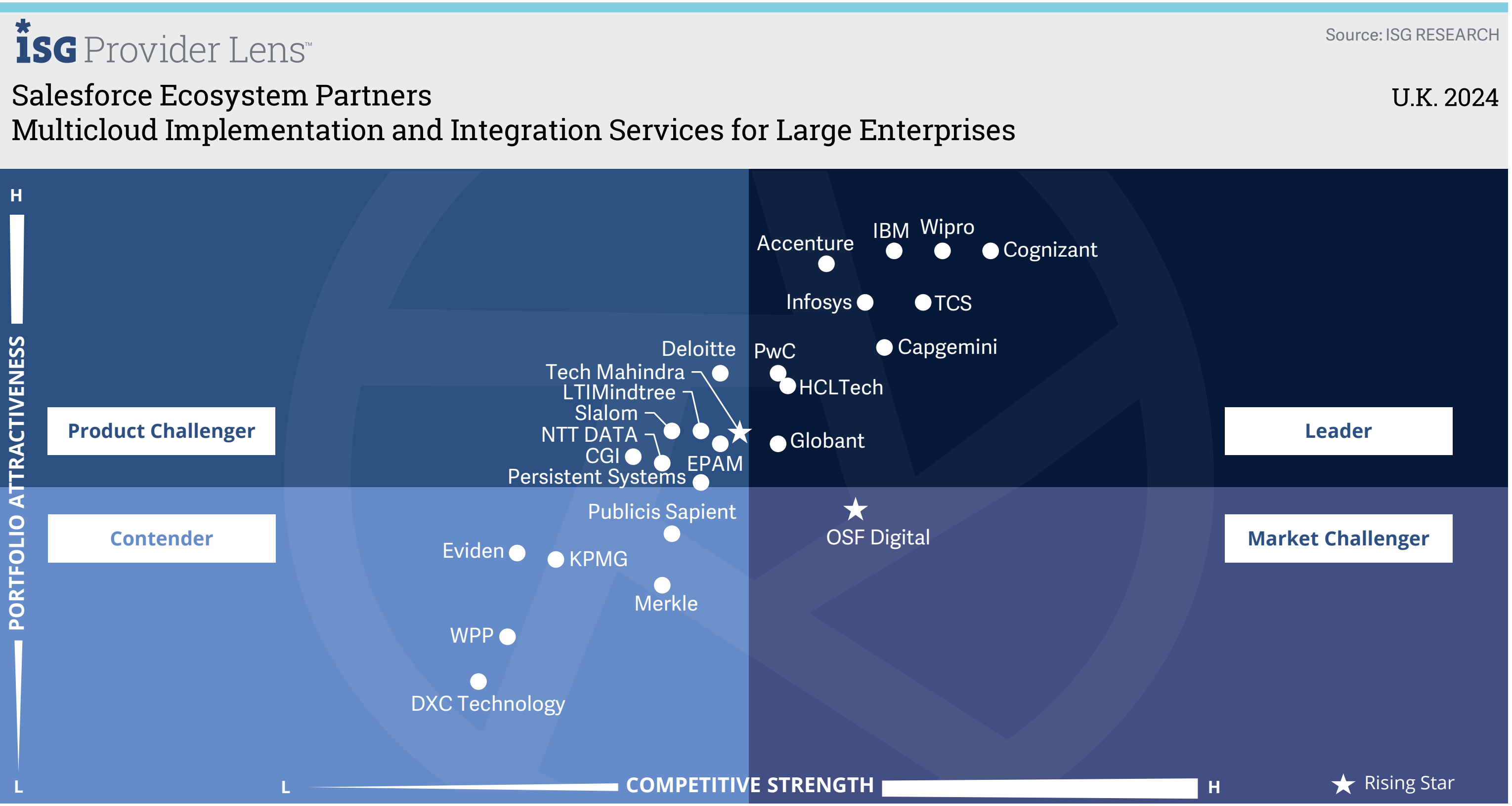
In this GenAI era, enterprises at different stages of maturity in their AI adoption journey aspire for digital transformation and AI integration. They seek service providers that prioritise AI best practices and industry-specific models for seamless integration and will help meet diverse enterprise requirements effectively.

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

IT and technology 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 Service Cloud to better manage field service operations.

Security and data professionals should read this report to comprehend how providers comply with U.K. security laws for Salesforce integration and compare practices for better understanding.



This quadrant assesses providers **implementing Salesforce applications, integrating** those into other **major packages**, and delivering to **large and globally operating clients**. Expertise in using **various Salesforce clouds** is essential in this quadrant.

Rodrigo Barreto

Definition

This quadrant assesses providers of implementation services tailored for Salesforce applications and their seamless integration with other significant enterprise software solutions. These integrations often form a critical part of the multifaceted systems used by large, global enterprises.

Our extensive study recognises the integral complexity of these clients' IT environments and the fact that they heavily rely on various Salesforce Clouds within the expansive Salesforce portfolio. This intricate landscape requires a comprehensive approach to implementation of long-term programs. These programs may span multiple rollouts across diverse divisions of client organisations, operating across various regions and markets.

From a functional perspective, these implementation services encompass process consulting to streamline operations, designing to create tailored solutions, configuration to maintain optimal system performance, data clean-up to ensure data quality and accuracy, migration of legacy systems to new platforms, and go-live support to ensure a smooth transition.

In conclusion, this quadrant is vital for enabling large, global enterprises to harness the full potential of Salesforce applications, aligning their systems optimally to achieve operational excellence and remain competitive in their respective markets.

Eligibility Criteria

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

Observations

Large enterprises in the multicloud implementation and integration services space constitute a dynamic segment for Salesforce. In pursuit of business benefits and strategic leadership, they invest heavily in technology to gain a competitive edge. These enterprises consider aspects such as cloud migration, big data and digital transformation as foundations for businesses to survive. The new frontiers are AI transformation and the efficient integration and management of customer and operational data that fuel AI technology.

Our assessment metrics are adjusted according to these trends, and we observe some relative movement among Leaders. LTIMindtree, a Leader in last year's study, has reverted to the Product Challenger position, while all others have maintained their Leader status, albeit with slightly different Portfolio Attractiveness and Market Strength scores.

Owing to the assessment of a larger number of Salesforce partners this year, a marked increase from 19 to 25, we have expanded the number of Leaders in the quadrant. Globant, a Rising Star last year, has fulfilled our prediction and met the criteria to be positioned as a Leader this year. TCS and Capgemini have also been identified as Leaders in 2024.

From the 50 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

Accenture has comprehensive offering and platform capabilities, with the largest global Salesforce practice by number of certified experts. Its close relationship with Salesforce enables it to focus on AI innovations and continuously develop talent and capabilities.

Capgemini

Capgemini aims to continuously evolve and conduct value-based Salesforce projects, emphasising collaboration with Salesforce to accelerate investments in GenAI. It is the second-largest partner in the U.K. by number of experts.

cognizant

Cognizant's extensive expertise spans the entire Salesforce offering spectrum. It also collaborates with the Salesforce ISV ecosystem. As an innovation-driven company, it has well-established pathways and internal programmes.

Globant

Globant's Salesforce Studio operates in collaboration with the other platform studios under the Enterprise Studio Network, showcasing its multicloud and multiplatform capabilities. CloudShift's successful integration in the U.K. further strengthens its position.

HCLTech

HCLTech stands out as a versatile Salesforce partner, providing comprehensive services. It uses a resourceful toolkit to efficiently operate and deliver projects. It also invests in AI and is a Salesforce's AI Advisory Board member.

IBM

IBM has comprehensive Salesforce capabilities, integrating AI and automation in its operations while collaborating with the ISV partner ecosystem. It leverages its Watson platform and invests in integration with Einstein in partnership with Salesforce.

Infosys

Infosys emphasises innovation- and solution-led offerings, using proprietary assets in complex multicloud integrations and incorporating solutions from the ISV ecosystem. Its extensive industry, domain and technology expertise drives its success.

pwc

PwC stands out with a significant number of Salesforce Certified Technical Architects and a strategic focus on expanding its and a strategic focus on expanding its alliances-based businesss. It actively invests in AI to enhance its capabilities and upskill its workforce.

TCS' comprehensive products integrate proprietary solution assets, consulting and co-innovation capabilities into flexible, composable offerings. It delivers efficient solutions with a global footprint, local presence and nearshore teams.

Wipro is at the forefront of industry trends, actively participating in various Salesforce Partner Advisory Boards, including the AI board. It uses proprietary methodologies, frameworks and tools to focus on an innovation-infused delivery approach.

OSF Digital

OSF Digital (Rising Star) focuses primarily on the Salesforce platform with its robust competency and sizeable teams of experts. It received the 2023 Partner Innovation Award for a project involving multicloud integration. It uses its own AI platform for project delivery.

Tech Mahindra (Rising Star) leverages its robust Salesforce capabilities to engage with business and technical leaders, penetrate large accounts and offer targeted solutions and PoCs. Under the new management, it prioritises identifying future challenges that clients may face.

Cognizant

Leader

"Cognizant's leadership in the Multicloud Implementation and Integration Services for Large Enterprises quadrant is attributed to its expertise in MuleSoft-based integration, an ingrained innovation culture and significant global and U.K. operating scales."

Rodrigo Barreto

Overview

Cognizant is headquartered in New Jersey, US. It has more than 346,600 employees across 147 offices in 50 countries. In FY22 the company generated $19.4 billion in revenue, with Financial Services as its largest segment. Cognizant's focused approach helps clients create connected, pan-industry products and services, primarily multicloud solutions. These solutions include Salesforce industry clouds, Marketing Cloud, Revenue Cloud, Commerce Cloud and MuleSoft. Cognizant's Salesforce practice in EMEA is based in the U.K. and has more than 340 certified professionals.

Strengths

An innovation-first practice: Cognizant displays a dynamic blend of start-up spirit and robust corporate presence, reflected in its membership across nine Salesforce Advisory Boards. In 2023, its internal innovation program, Bluebolt, generated a remarkable 1,750 innovative ideas focused explicitly on enhancing CX and customer relationship management. Notably, 126 of these ideas were successfully implemented for clients.

Specialists in multicloud integration: Cognizant demonstrates strong performance in MuleSoft, where Salesforce continues to post double-digit growth. It has also been honoured with the MuleSoft Customer Success Partner of the Year award 10 times. Its capabilities span industry expertise, data proficiency and MuleSoft competence, creating a comprehensive and unmatched skill set.

Leading Salesforce global systems integrator (GSI): Cognizant is a leading GSI with over 2,500 enterprise clients. It has more than 11,000 Salesforce consultants, of which over 340 are U.K.-based certified professionals. It ranked number 3 globally in terms of Salesforce certifications (over 35,000). Cognizant's extensive experience covers the entire range of Salesforce offerings and extends to partners within the Salesforce ISV ecosystem.

Caution

Cognizant stands out as an exceptional performer across various KPIs, demonstrating excellence in Portfolio Attractiveness and Market Strength. However, it can strive to improve its number of Certified Technical Architects, which is lower than its top-tier peers.

Implementation Services for Core Clouds — Midmarket

Who Should Read This Section

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

In this quadrant, ISG defines the current market positioning of Salesforce core cloud implementation service providers in the U.K.; in some cases, regional players headquartered in Europe with local presence in the U.K. have also been considered. These providers adopt an Agile approach for implementation, helping clients redesign processes and enabling the implementation of Salesforce applications.

In the U.K., enterprises prefer service providers with a range of capabilities encompassing strategic advisory, integration, data migration, thorough testing and go-live support with enhancements, enabling seamless operations, innovation and sustained growth across all facets.

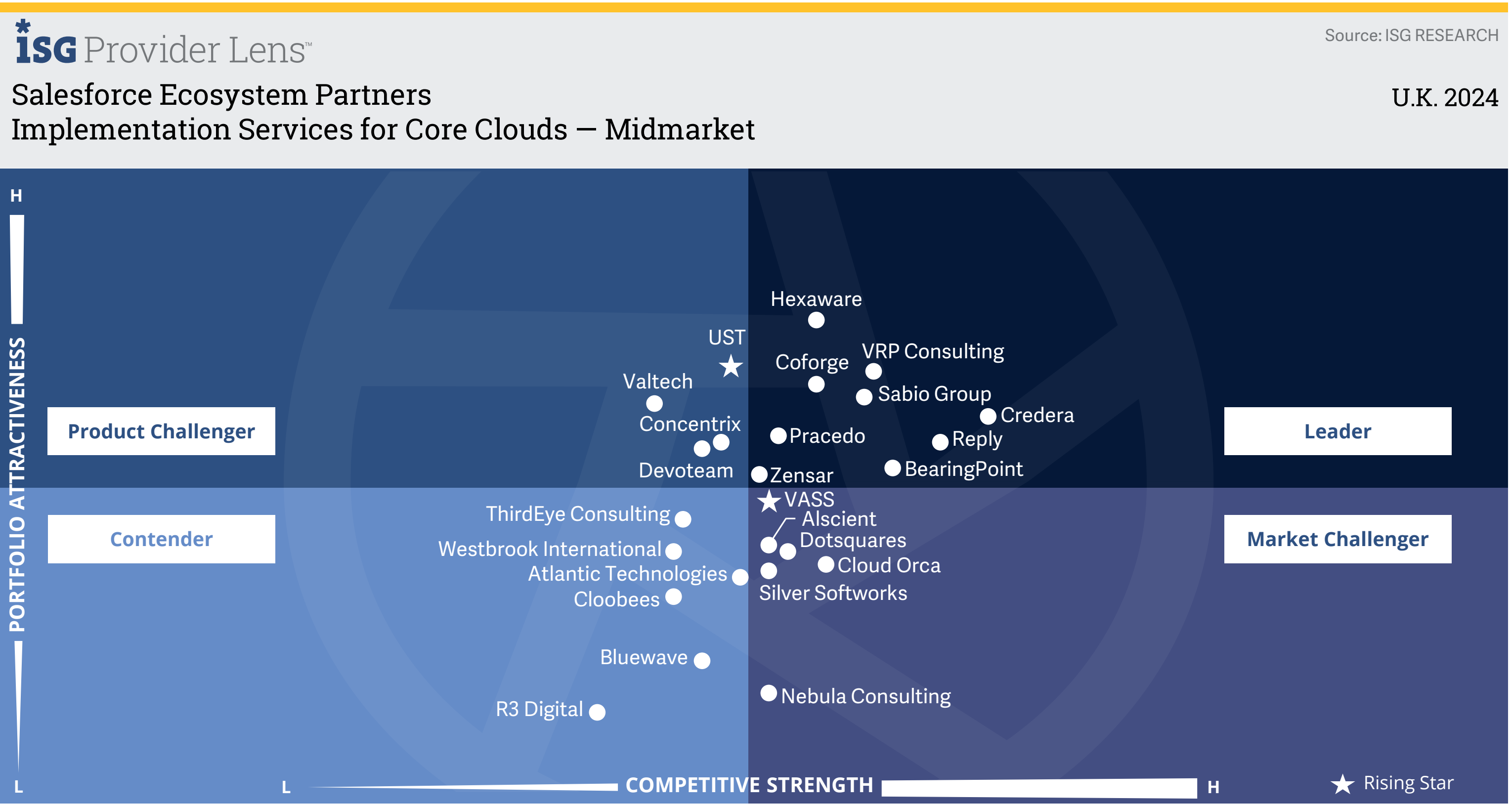
Enterprises evaluate service providers based on their capabilities, such as the number of certified full-time employees (FTEs), successful project deliveries and regional reach (onshore, offshore and nearshore centres). Thus, service providers are strengthening their certified workforce through targeted training programs and collaboration with educational institutions. They are also incentivising employees to pursue certifications, offering customised and pre-configured solutions and enhancing their regional presence through acquisitions and strategic partnerships.

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.

IT and technology 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 enhance Salesforce Service Cloud for improved field service operations.

Security and data professionals should read this report to comprehend how providers comply with U.K. security laws for Salesforce integration and compare practices for better understanding.



This quadrant assessed providers **specialising in Salesforce core clouds and delivering to midsize and small clients**. The quadrant also examines their focus on an **Agile approach for delivery and consulting capabilities**.

Rodrigo Barreto

Definition

This quadrant assesses providers specialising in Salesforce's core offerings — Sales Cloud, Service Cloud, Commerce Cloud and Community Cloud. These products are often considered to form the foundation of Salesforce's cloud-based services. Providers in this category adopt an agile implementation approach, typically catering to clients with midsize or smaller operations. They excel in cases that require minimal integration, resulting in projects within this quadrant often concluding in just a few months.

Key aspects of the services offered by providers in this quadrant revolve around process redesign using Salesforce applications. Implementation services cover process consulting to optimise workflows, designing to tailor Salesforce solutions, configuration to maintain seamless system performance, data clean-up to enhance data quality, data migration to transition smoothly, and go-live support to ensure a successful launch.

This agile approach, coupled with a focus on Salesforce's core clouds, is suitable for midsize and small enterprises with less complex requirements. It seamlessly aligns with their needs, enabling them to swiftly harness Salesforce's capabilities and enhance their operations. By streamlining processes and leveraging these core cloud products, enterprises can efficiently adapt to evolving market demands and achieve better outcomes within a relatively short timeframe.

Eligibility Criteria

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

Observations

The partners participating in the Implementation Services for Core Clouds — Midmarket segment have fewer than 500 experts globally and less than 150 experts in the U.K. In the mix of companies, an increasing number of smaller U.K.-centric partners presented rapid growth last year but from a lower base. The market also has practice subsidiaries of 300-500 experts globally, prioritising the U.K. and the US as their key markets. Finally, there are regional players with a strong presence in the U.K.

Three of the companies analysed, which were initially U.K.-focused, have changed ownership in the last two years and are on the path of international growth supported by their parent companies. These are Sabio Salesforce Practice (previously makepositive), Credera (previously BrightGen) and Pracedo (which changed ownership from the Mashfrog Group to Collabera Digital). Additionally, BearingPoint, a regional player, reinforced its presence in the U.K. by acquiring Smplicity.

Leaders in this quadrant focus on select segments and offer a comprehensive, though not always all-encompassing, set of Salesforce products. Their solutions typically include one or two core clouds and do not require complex integrations.

Compared with last year, VRP Consulting, Coforge, Pracedo and Zensar have advanced to the Leader positions in the midmarket segment. On the other hand, CGI and Persistent Systems have been moved to the pool of companies addressing the large enterprise segment and are no longer considered in the midmarket.

From the 50 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and two Rising Stars.

BearingPoint

BearingPoint, a midmarket Salesforce practice with U.K.-based experts, strengthened its position in the market through the successful integration of Smplicity in 2023. It uses an established delivery methodology that employs a customer-centric approach.

Credera

Credera, previously BrightGen,serves as Omnicom's Salesforce CoE. Recognised in the U.K. midmarket, the company earned the U.K.I Outstanding Implementation Partner of the Year 2023 award from Salesforce and boasts a portfolio of renowned U.K. clients.

Coforge

Coforge employs a focused strategy, prioritising specific verticals and emphasising the growth of its Salesforce ACV. WHISHWORKS' acquisition and integration have contributed to the company's capabilities and client relationships.

HEXAWARE

Hexaware has a cross-domain offering, including pre-configured solutions, consulting services and GPT enablement in Salesforce, and its proprietary solutions are customised for specific use cases. As the sole tech company in the Carlyle Group, it has room for growth.

Pracedo

Pracedo positions its Salesforce services as a connected CX proposition. The recent change in ownership allows it to expand in size and scope. Although initially focused on solutions for the nonprofit segment, it now adopts various Salesforce products.

REPLY

With extensive Salesforce platform expertise, **Reply** holds a sizeable presence in the U.K. It showcases versatility across industries, particularly excelling in the automotive sector. Structured as a federation of specialist companies, it excels in multiple technologies.

SABIO

Sabio Group has successfully integrated makepositive into its Salesforce practice, targeting the midmarket segment in the U.K. It operates with a development team in India, aligning its offerings to benefit from synergies with Sabio Group's other activities.

VRP Consulting

VRP Consulting is a multi-award-winning specialised Salesforce partner with broad platform expertise, serving various verticals and collaborating with an extensive list of ISV ecosystem partners.

Zensar

Zensar offers a comprehensive range of products and services, showcasing solutions tailored to specific use-cases. It maximises efficiency by leveraging assets created in various engagements for new projects.

UST

UST (Rising Star) excels in various areas of Salesforce expertise and has in-depth knowledge of selected industry verticals. Additionally, it actively contributes to the ISV partner ecosystem by developing industry-specific and functional apps for the Salesforce platform.

VASS

VASS (Rising Star), with a significant U.K. presence and a dedicated U.K. leadership team, prioritises the financial services sector, actively engaging in Salesforce's Partner Advisory Board for this segment. VASS' Salesforce platform offering is wide-ranging.

Implementation Services for Marketing Automation

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.K. that are evaluating implementation service providers for Salesforce marketing automation.

In this quadrant report, ISG defines the current market positioning of Salesforce marketing automation implementation service providers in the U.K. and how they address the key challenges enterprises face. These providers focus on delivering direct, personalised customer engagement and increasing clients' revenue through tailored communication at scale and across multiple channels. Salesforce marketing automation is often the entry point for Salesforce journeys, and companies seeking this implementation service typically have complex real-time integration needs.

In the U.K., enterprises seek end-to-end digital marketing automation and marketing cloud capabilities, wherein service providers focus on improving their marketing automation and marketing cloud capabilities using GenAI, automation and other tools. These capabilities help deliver data-driven personalised experiences, maximise customer lifetime value and drive customer retention.

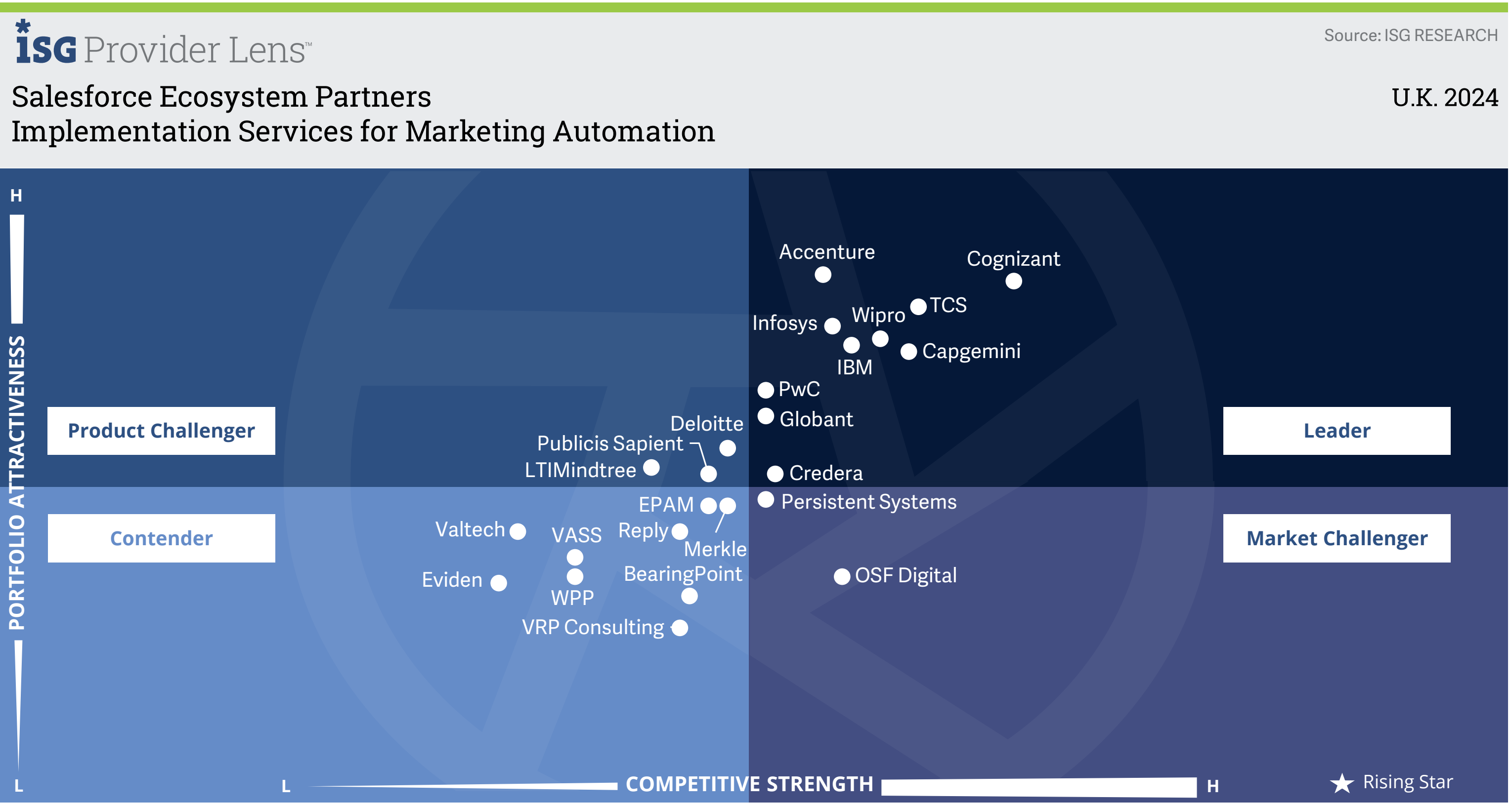
Enterprises seek efficient ways of leveraging customer data to increase retention, loyalty and customer lifecycle value. To address this demand, service providers offer pre-defined solutions that target sector-specific use cases leveraging GenAI, automation and cutting-edge technologies.

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

IT and technology 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 relative positioning in adopting Salesforce Marketing Cloud, comparing technical capabilities, automation depth and development methodologies.

Security and data professionals should read this report to comprehend how providers comply with U.K. security laws for Salesforce integration and compare practices for better understanding.



This quadrant assesses providers' specialism in **Salesforce Marketing Cloud in a wide spectrum of implementation scenarios**. They are assessed for **implementation capabilities** and expertise in the **use of customer data and automation of marketing processes**

Rodrigo Barreto

Definition

This quadrant examines providers specialising in Salesforce Marketing Cloud, catering to a wide spectrum of implementation scenarios. These range from minimal real-time integration into a complex system landscape to more challenging projects with a foundation of Salesforce Marketing Cloud for sophisticated e-commerce and omnichannel marketing endeavours. These scenarios require deep integration into a client's enterprise IT landscape.

Expertise in marketing-specific aspects such as media utilisation and multichannel strategies is paramount in this quadrant. Given that integration with end clients often involves a high volume of transactions, the automation of processes emerges as a critical success factor.

The implementation services offered cover process consulting to optimised marketing strategies, designing to tailor Salesforce solutions, configuration to ensure seamless performance, data clean-up to enhance data quality, data migration to enable smooth transitions. These services also cover go-live support to ensure a successful launch.

Providers in this quadrant play a pivotal role in helping businesses harness the potential of Salesforce Marketing Cloud for simple implementations as well as complex, data-intensive omnichannel marketing initiatives. They ensure that a client's marketing capability is efficient and fine-tuned to deliver the best possible results in a competitive business landscape.

Eligibility Criteria

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

Observations

The scope of the Implementation Services for Marketing Automation quadrant has evolved this year to include partners targeting the large enterprise segment and those focused on the midmarket. This change reflects that marketing automation has become mainstream across segments and is no longer exclusive to specialist boutiques.

With the updated eligibility criteria, we shortlisted a diverse mix of large and midsize practices based on scoring metrics for this quadrant. Most assessed Leaders in this segment target large enterprises, leveraging their scale and expertise to build sophisticated marketing automation solutions. They often cross-sell and up-sell marketing automation services to their existing clients using their services in other areas.

Leaders in this quadrant consistently draw on customer data to personalise experiences. They also excel in providing consulting services that assist clients in shaping effective marketing strategies and implementing related marketing automation capabilities.

Their value propositions often revolve around crafting solutions that enhance customer loyalty, increase conversion rates and maximise customer lifetime value.

From the 50 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders.

accenture

Accenture's business unit, Accenture Song, specialises in providing digital marketing, analytics and mobility services. The company's marketing automation offering seamlessly integrates AI solutions with Salesforce to deliver value and growth.

Credera

Credera, Omnicom's Salesforce CoE, implements substantial marketing strategy resources. Focused on the midmarket, it delivers marketing automation solutions as part of its core cloud projects and holds a high number of marketing certifications.

Capgemini

Capgemini takes an integrated approach to marketing automation, which facilitates a shift from product-centric to customer-centric strategies. Strategic investments, such as those in a U.K.-based creative agency, give it access to several companies' marketing functions.

cognizant

Cognizant provides comprehensive marketing automation seamlessly integrated into the company's end-to-end service portfolio. Its in-depth knowledge of Data Cloud and the acquisition of Lev confer Cognizant with considerable expertise in Salesforce's Marketing Cloud.

Globant

Globant focuses on creating marketing automation solutions to drive customer loyalty and growth, offering a comprehensive range extending beyond platform services to data and marketing capabilities. It also incorporates ChatGPT into its solutions.

IBM

IBM enhances customer conversion, loyalty and trust by leveraging CRM data. Its asset, IBM App Connect, automates processes and synchronises data and actions on Marketing Cloud objects. It uses Watson to offer enhanced solutions.

Infosys

Infosys provides end-to-end marketing automation solutions in a structured manner to plan and deliver large-scale implementations. The acquisition of Fluido has strengthened Infosys' regional presence.

pwc

PwC, a recent award winner for its marketing automation project with Mercedes, demonstrates remarkable capability in marketing within the Salesforce platform. Its Strategy& unit enhances its technical expertise with consulting capabilities.

TCS offers end-to-end marketing automation services, combining technical implementation with strategy design. It uses data to personalise experiences, enhance customer lifetime value and creatively explore new use cases.

Wipro delivers end-to-end marketing services, blending technical expertise with strategic guidance. It focuses on innovation through a dedicated CoE for marketing solutions.

Cognizant

Leader

"Cognizant is a Leader in this quadrant. It has an extensive marketing strategy, data, analytics and AI expertise, and it seamlessly integrates its marketing automation offering into comprehensive end-to-end solutions."

Rodrigo Barreto

Overview

Cognizant is headquartered in New Jersey, US. It has more than 346,600 employees across 147 offices in 50 countries. In FY22 the company generated $19.4 billion in revenue, with Financial Services as its largest segment. Cognizant's Salesforce practice for the EMEA region is based in the U.K., with more than 340 Salesforce-certified professionals. The company's Salesforce marketing automation services merge advanced technology, strategic insights and tailored solutions to optimise marketing efforts and drive business success.

Strengths

Marketing automation and beyond: Cognizant not only offers extensive global marketing automation services but also can extend projects to provide support across the entire Salesforce suite. The company's expertise in data, analytics and AI supports the seamless integration of its marketing automation offering into an end-to-end service portfolio.

Experts in data cloud: Cognizant has executed over 20 engagements involving Salesforce Data Cloud. With over 100 certified consultants, the firm harnesses the power of Salesforce Data Cloud to integrate data and insights, driving personalised CX seamlessly. Customers can quickly identify impactful use cases using Cognizant's Salesforce Data Cloud Navigator.

Marketing experts: Acquired in 2020 and now integrated into Cognizant, Lev is a full-service Salesforce consultancy. Lev specialises in assisting top brands in connecting with their customers. It combines strategy and expertise in every solution to elevate customer engagement and drive marketing success. Lev has attained Expert level partnership in Salesforce Marketing Cloud through certifications, customer satisfaction and extensive experience.

Caution

Cognizant differentiates itself as a top performer in this quadrant, showcasing its strengths and capabilities. Lev's acquisition has extended its marketing strategy consulting expertise. To enhance its position further, Cognizant can explore partnerships with marketing agencies and win clients at the CMO level.

Managed Application Services for Large Enterprises

Who Should Read This Section

This quadrant is relevant to large enterprises across all industries in the U.K. evaluating the service providers of Salesforce managed applications.

In this report, ISG defines the current market positions of service providers of Salesforce managed applications to large enterprises in the U.K. This study also covers providers offering additional services, including administrative assistance, accelerators for development and utilisation, development services, proactive monitoring and advisory services. Conventional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring.

In the U.K., enterprises aim to implement and integrate Salesforce managed applications to maximise investment value. To address such customer requirements, service providers prioritise continuous support, optimisation and enhancement of Salesforce implementations.

Foreseeing the high demand for Salesforce managed application services in the region, service providers are adopting automation, AI and DevOps methodology to offer specialised skills in commerce, marketing and next-generation products and facilitate quicker turnaround times with cost-effective investments.

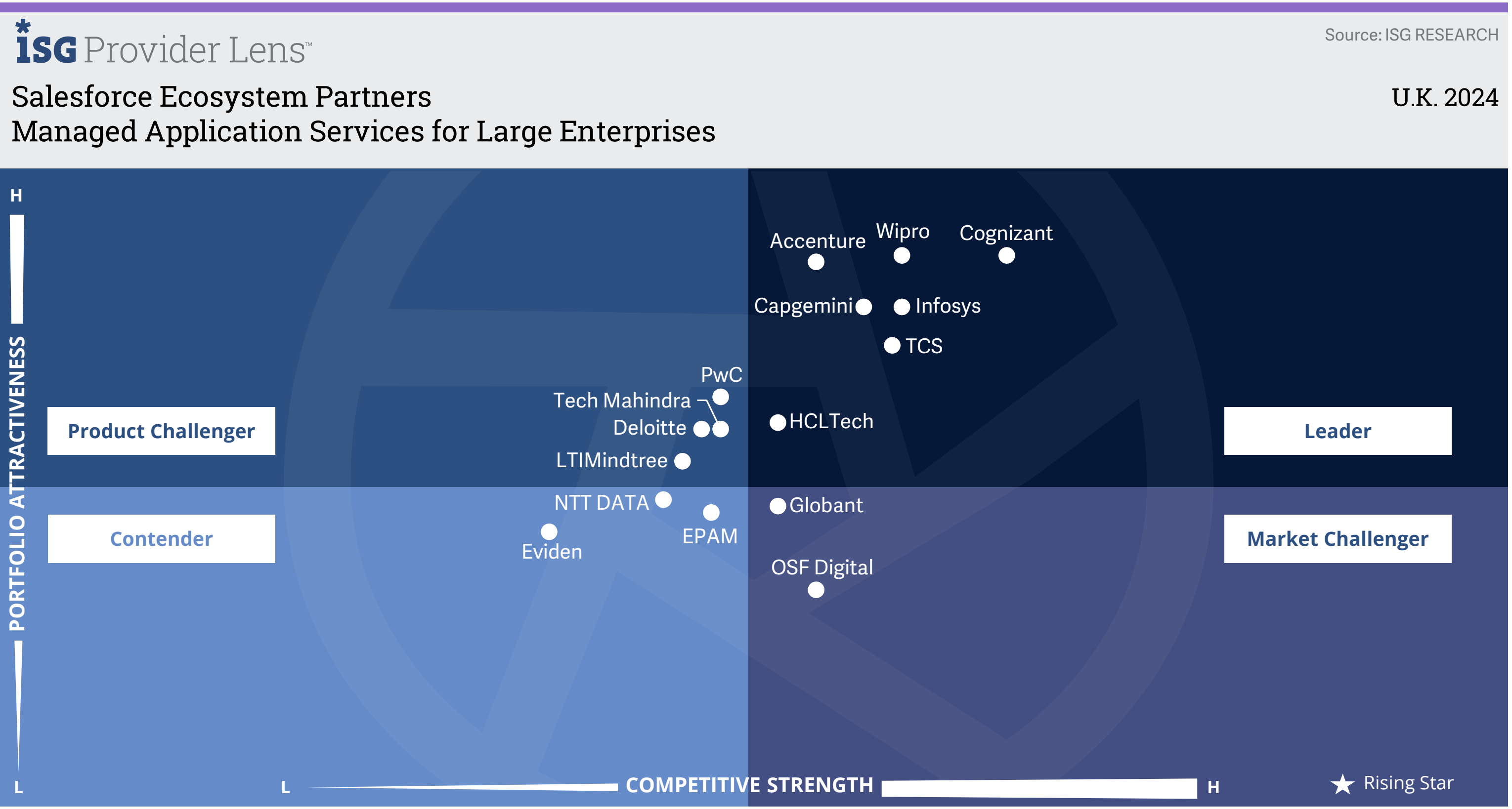
Enterprises prefer service providers that manage applications and licences, offer user support and develop business applications integrated with platforms.

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

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

IT and technology leaders should read this report to better understand capabilities of service providers of managed services and compare the technical capabilities of these providers in remote and onsite monitoring and others

Security and data professionals should read this report to comprehend how providers comply with U.K. security laws for Salesforce integration and compare practices for better understanding.



This quadrant assesses **managed service providers for the maintenance and support of Salesforce applications**. It focuses on providers catering to **large enterprises** with **complex application landscapes**.

Rodrigo Barreto

Definition

This quadrant assesses providers that offer managed application services for maintenance and support functions. These include continuous monitoring, remote support, centralised management of Salesforce applications, meticulous data quality management, and data security and compliance-related aspects.

For large enterprise clients, these managed services expand in scope to address global reach and the inherent complexity of application landscapes. Such landscapes often involve a variety of solutions from various software providers, making centralised management and support a challenging but essential undertaking.

A key focus in this quadrant is the persistent pursuit of improvements and innovation in the solutions offered. The aim is to enhance the business value generated for enterprises consistently. These managed application services are defined by the transfer of key responsibilities to the service provider and are provided within the confines of rigorously defined SLAs.

Providers in this quadrant serve as the backbone of large enterprises' Salesforce operations, ensuring not only meticulous maintenance of essential functions but also increased business value. Simultaneously, they are responsible for safeguarding data integrity, security and regulatory compliance within enterprise operations' complex, global landscape.

Eligibility Criteria

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

Observations

Companies in this quadrant represent a subset of those offering implementation and integration services for multicloud solutions. They have a strength of more than 700 certified experts and a global presence.

A shared attribute among the Leaders in this quadrant is the use of a diverse range of methodologies, frameworks and tools, mainly seeking to add value using proprietary assets that streamline processes and increase efficiency. They emphasise integrating AI and automation, with many adopting a DevOps framework and some actively advocating an AIOps approach. Notably, certain players are shifting the evaluation metric from service level to CX.

In response to the challenging economic conditions and increased interest rates, many companies are prioritising cost optimisation for clients and delivering greater value through Salesforce solutions. Participants in the study highlighted a growing demand for consulting services focused on consolidating and optimising licences. Simultaneously, there is a significant interest in services that boost the adoption of the platform by employees and maximise the value extracted from implemented solutions.

In this year's assessment, the number of Leaders in this quadrant has increased from six to seven. LTIMindtree moved from its Leader position to a Product Challenger, while TCS and Capgemini demonstrated increased Portfolio Attractiveness and advanced to become Leaders. The relative positions among Leaders have evolved based on their service innovations and the appeal of their market propositions.

From the 50 companies assessed for this study, 16 qualified for this quadrant, with seven being Leaders.

Accenture uses automation, GenAI, RPA and a powerful proprietary toolset to enhance its managed application services and gain a competitive edge. It adopts DevOps for automated process implementation, thus optimising its Salesforce services.

Capgemini provides robust managed application services, including AIOps for multicloud solutions, ensuring continuous optimisation and enhanced CX. It follows a delivery model centred on quality, efficiency, talent and collaboration.

Cognizant's services span the entire application lifecycle, with a commitment to continuous innovation. It adapts to industry advancements; it recently incorporated services for GenAI, emphasising talent development and contributing to AI governance and policies.

HCLTech's managed application services prioritise operational efficiency and streamlined processes. It focuses on smart operations through proprietary tools and has transitioned from traditional SLAs to XLAs.

Infosys provides robust support for Salesforce applications, offering targeted services to optimise processes, improve efficiency and enhance operational effectiveness. Its approach emphasises innovation and transformation, using a suite of proprietary specialist tools.

TCS meets the growing client demands for customised support and efficiency-enhancing services through a machine-first approach. It leverages various tools and automation and a global delivery model to achieve consistent YoY improvements in cost and quality.

Wipro provides customisable managed application services to optimise efficiency and enhance UX. It also informs clients about upcoming Salesforce platform features for continuous innovation awareness.

Leader

"Cognizant is a Leader in this quadrant. It manages the entire application lifecycle, from deployment to modernisation, focusing on automation, intelligence and efficiency. Its services support Salesforce's innovation in data and AI."

Rodrigo Barreto

Cognizant

Overview

Cognizant is headquartered in New Jersey, US. It has more than 346,600 employees across 147 offices in 50 countries. In FY22 the company generated $19.4 billion in revenue, with Financial Services as its largest segment. Cognizant's Salesforce managed application services combine implementation and integration of application development solutions, application management and application modernisation. Cognizant's Salesforce practice in EMEA is based in the U.K., with more than 340 certified Salesforce professionals in the region.

Strengths

Continued service innovation: Cognizant offers automated, intelligent and streamlined support services. Its approach involves implementing various innovative methodologies and frameworks, including the Zero Maintenance Framework™. Thematic initiatives encompass demand elimination, self-service/help, process standardisation through root cause analysis, trend and pattern analysis, and proactive monitoring under the Eliminate phase. Automate involves using chatbots as a user interface, bot-centric incident management, and script and tool-based automation. The Industrialise and Synergise phase includes AMS in a Box, while the Transform phase focuses on the Service Introduction Framework.

Managed services for GenAI: Cognizant has developed new services to enable enterprise clients to leverage Einstein. The initiative encompasses upskilling and talent development through role-specific curricula and co-authoring of AI governance policies.

Complete lifecycle application services: Cognizant provides comprehensive managed application services, encompassing application development and managing clients' existing application states. Its application modernisation services aid customers in transforming their Salesforce multicloud applications and data portfolios and align them with evolving business needs.

Caution

Cognizant, excelling in various metrics in this segment, still has a few opportunities for improvement. Initiatives include advancing its Level II Specialist recognition to Expert-level and enhancing its AppExchange overview page with content specific to managed application services.

Managed Application Services for Midmarket

Who Should Read This Section

This quadrant is relevant to small and midsize enterprises across all industries in the U.K. evaluating service providers of Salesforce managed applications.

In this report, ISG defines the current market positions of service providers of Salesforce managed applications to small and midsize companies in the U.K.

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 utilisation, development services, proactive monitoring and advisory services.

In the U.K., small and midsize enterprises seek seamless Salesforce performance, proactive enhancements, multilingual support and interface monitoring. To cater to these demands, service providers are strengthening their Salesforce managed application service portfolios by leveraging GenAI and automation.

Anticipating high demand for managed application services from midmarket enterprises in the U.K., service providers are streamlining their application management services by combining cost-effective automation with transformative solutions for sustainable savings.

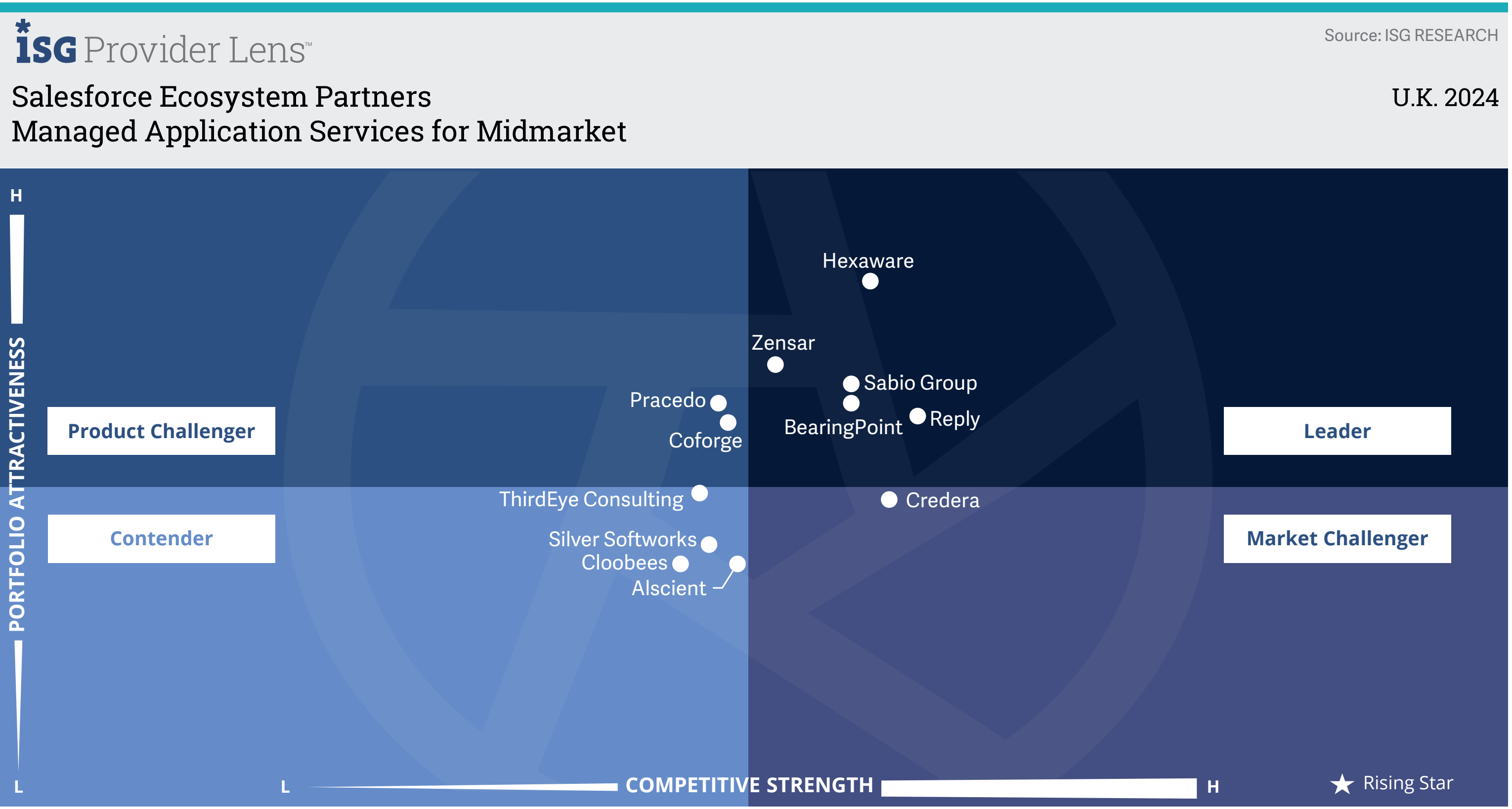
They are also enhancing their service capabilities by providing flexible support options, reliability and easy availability.

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

IT and technology 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 Salesforce Service Cloud use to better manage field service operations.

Security and data professionals should read this report to comprehend how providers comply with U.K. security laws for Salesforce integration and compare practices for better understanding.



This quadrant assesses **service providers** of **Salesforce application maintenance and support**. These providers target **midmarket clients**, which have **lower integration requirements** and a more **regional focus**.

Rodrigo Barreto

Definition

This quadrant focuses on providers' proficiency to deliver managed application services that encompass vital maintenance and support functions. These functions cover a comprehensive array of services, including monitoring, remote support, centralised administration of Salesforce applications, data quality management, and data security and compliance adherence.

Midmarket clients often have more modest integration requirements and tend to concentrate their operations within a specific region. They demand strong regional support, and providers in this quadrant are equipped to meet these requirements.

An essential aspect within this quadrant is the ongoing commitment to enhance the solutions offered. Providers constantly seek to improve and innovate their services to generate additional value for their clients. The capacity for ongoing refinement and adaptation is pivotal in a rapidly evolving business landscape.

Managed application services are defined by the transfer of key responsibilities to a dedicated service provider. These services are offered within well-defined SLAs ensuring that the clients' expectations are consistently met and exceeded.

Providers in this quadrant play a pivotal role in offering a regional focus and tailored support to midmarket clients, while diligently catering to the intricate Salesforce applications, data quality and compliance requirements. These factors contribute to the continued growth and success of their clients' businesses.

Eligibility Criteria

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

Observations

All companies in this quadrant offer implementation services for core clouds in the midmarket, often handling initial implementations and maintaining long-term relationships through managed application services. Leaders emphasise offering streamlined managed services tailored to customer needs and employ hybrid delivery models with local, nearshore and offshore resources. Flexible pricing models, combining flat fees and effort-based pricing, are prevalent in the market. Partners structure offerings with core services and expandable modules, defining tiers based on factors such as availability, region, language and expert access. While adopting methodologies and tools to offer managed application services is expected, the level of automation and adoption of DevOps vary among partners, with room for growth in the coming years.

Compared with 2023, Coforge transitioned from the Leader position to a Product Challenger role. Meanwhile, BearingPoint, assessed for the U.K. region this year, demonstrated high Competitive Strength and Portfolio Attractiveness, securing a Leader position. Among the Leaders, there were some shifts in relative positions, albeit not significantly.

From the 50 companies assessed for this study, 12 qualified for this quadrant, with five being Leaders.

BearingPoint

BearingPoint's modular managed application services offer flexible pricing with various combinations of effort-based and flat fees per module. It also provides options for communication channels, availability levels and language in its delivery.

HEXAWARE

Hexaware follows a value-driven approach, offering outcome-driven services for the build, transform and run stages. It uses a pay-per-service model model with a catalogue-based offering, focusing on core cloud services for the midmarket and employing proprietary tools for delivery.

REPLY

Reply provides flexible services tailored to client needs and service-level preferences. Leveraging expertise across its group companies, Reply innovates with elements like DevOps and RPA. They offer packaged solutions tailored to midmarket requirements.

SABIO

Sabio Group offers robust client-centric services, addressing diverse needs and ensuring high satisfaction levels. It has a dedicated team that excels in delivering application services. The recent integration of the Salesforce Practice with the group opens doors for innovation.

Zensar

Zensar's midmarket-focused offering, with core and flexible options, uses enablers to enhance service delivery. Its strategic goal is YoY cost reduction and increased value for clients.

Implementation Services for Industry Clouds

Who Should Read This Section

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

This quadrant includes implementation service providers focused on Salesforce industry clouds, such as Financial Services Cloud, Automotive Cloud and Health Cloud. Industry-specific skills and suitable accelerators are critical success factors for this segment. Furthermore, service providers must be able to develop comprehensive solutions based on the various Salesforce products that are relevant to a particular client's situation.

Salesforce is currently focusing on creating more vertical-specific offerings, which will become a high priority in future implementations. From a functional perspective, implementation services include process consulting, design, configuration, data clean-up, migration and go-live support.

Production-ready and pre-defined Salesforce industry cloud solutions that require few/minimum customisations in the U.K. are gaining traction to address industry-specific requirements. Service providers are investing in GenAI and automation tools to create pre-defined solutions for industry cloud services.

Service providers have also introduced technological platforms to resolve industry cloud-related concerns. It supports different industries such as banking, insurance, automotive and healthcare.

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 comprehend how providers comply with U.K. security laws for Salesforce integration and compare practices for better understanding.

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

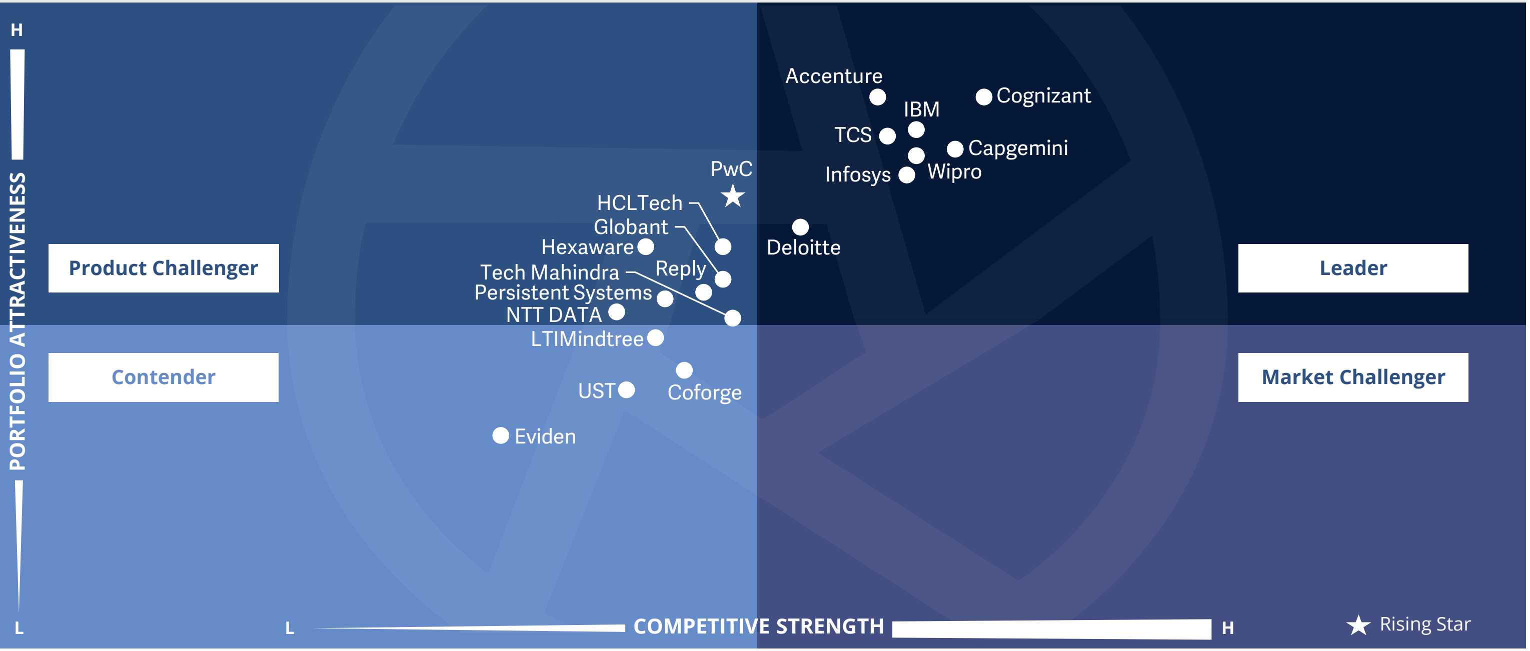
Marketing and sales leaders should read this report to effectively analyse service partners' capabilities around industry cloud.

Source: ISG RESEARCH

isg Provider Lens™

Salesforce Ecosystem Partners
Implementation Services for Industry Clouds

U.K. 2024



This quadrant assesses **implementation service** providers that focus on the **industry cloud products of Salesforce**. It also assesses their ability to develop **specialist solutions** that target **industry-specific use cases**.

Rodrigo Barreto

Definition

This quadrant assesses providers offering implementation services tailored to Salesforce's Industry Cloud products. These industry specific offerings, such as Financial Services Cloud and Health Cloud, require unique skills and the deployment of relevant accelerators to ensure successful implementation. Having a deep understanding of the nuances and particularities within such specific industries is essential for providers in this segment.

Another pivotal aspect within this quadrant is the ability to craft holistic solutions by seamlessly integrating various Salesforce products. This skill enables providers to create comprehensive, tailored solutions that exactly match the unique needs of each client's specific situation. Salesforce's strategic shift toward increased verticalisation underlines the growing significance of this capability, making it a top priority in new implementations.

From a functional perspective, the implementation services cover process consulting to optimise workflows, designing to create tailored solutions, configuration to ensure seamless system performance, data clean-up to enhance data quality, data migration to facilitate a smooth transition, and go-live support to ensure the successful launch of these specialised industry cloud solutions.

Providers in this quadrant play a vital role in ensuring that businesses within specific industries harness the full potential of Salesforce's industry cloud products. Their industry-specific expertise and proficiency in integrating multiple Salesforce offerings empower organisations to tackle sector-specific challenges efficiently and gain a competitive edge in their respective fields.

Eligibility Criteria

1. **Well-proven domain expertise** for respective industries
2. **Strong implementation capabilities (consulting, configuration, data migration and 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. **Presence of unique differentiators** such as proven industry-specific accelerators
5. **Economic stability and significant delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**

Observations

One year following Salesforce's expansion into industry clouds, the landscape is becoming more defined. Some companies are leveraging longstanding partnerships with Vlocity to develop targeted proprietary assets for vertical-related use cases, adopting a micro-segmentation strategy. Others are building robust industry cloud capabilities with multiple technologies and using this know-how to extend Salesforce industry cloud solutions. Some partners have seized the opportunity to co-develop industry clouds such as Automotive or Life Sciences, collaborating closely with Salesforce while adding their proprietary assets. These strategies are not exclusive; we observe various permutations in the partner ecosystem.

The Leaders from 2023 have retained their positions, but their relative standings have shifted due to market success and the pace of innovation resulting from implementing the mentioned strategies. With a larger pool of companies considered in this quadrant, TCS and Deloitte Digital have also secured Leader positions. Furthermore, PwC has enhanced its Portfolio Attractiveness and earned the recognition of a Rising Star this year.

From the 50 companies assessed for this study, 20 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture leverages industry expertise for accelerated value and growth. It has been co-developing the Life Science Cloud with GenAI with Salesforce. As one of the early adopters of Vlocity, it has extensive experience with industry solutions.

Capgemini

Capgemini collaborates with customers in various industries, such as digital telco, grocery retail and banking, to craft tailored solutions. It offers a flagship solution for the automotive sector, co-developed with Salesforce.

cognizant

Cognizant is organised by verticals and develops industry-specific solutions across diverse segments. It leads in industry clouds, offering function-specific solutions and actively invests in AI integration.

Deloitte Digital

Deloitte Digital, the leading Salesforce ecosystem partner in the U.K. by number of certified consultants, specialises in sector-focused industry solutions for financial services, manufacturing and healthcare. It also incorporates Einstein AI in certain offerings.

IBM

With unparalleled industry credentials, **IBM** provides pre-built solutions and assets tailored to various verticals. It participates in seven Salesforce industry boards and leads in the Automotive Cloud.

Infosys

As an industry solutions specialist and early partner for Industry Solutions with Vlocity, **Infosys** excels in providing solutions across various verticals. Its AI suite features hundreds of reusable assets tailored to key industry use cases.

tcs TATA CONSULTANCY SERVICES

TCS offers superior industry-specific solutions and seamlessly integrates industry solutions with various Salesforce core clouds for optimal value delivery. It is committed to offering enhanced value by prioritising proprietary assets in engagements.

Wipro is dedicated to offering industry-specific solutions and actively participates as a member of Partner Advisory Boards. It is also a development partner for Automotive Cloud. It emphasises faster time to value using industry-specific features, apps and data models.

PwC's (Rising Star) alliances, spanning various key verticals, foster co-innovation. It takes a multiplatform approach and leverages its know-how with the PwC industry cloud to enhance Salesforce solutions.

Cognizant

Leader

"Cognizant is a Leader in this quadrant. It strategically organises itself vertically, facilitating impactful discussions with customers on domain-specific topics. It has launched over 10 industry-specific solutions and adds a strategic focus on AI."

Rodrigo Barreto

Overview

Cognizant is headquartered in New Jersey, US. It has more than 346,600 employees across 147 offices in 50 countries. In FY22 the company generated $19.4 billion in revenue, with Financial Services as its largest segment. Cognizant has one of the fastest-growing Salesforce practices in the world and vast capabilities across Salesforce industry clouds. Cognizant's Salesforce practice in the EMEA region is based in the U.K., with more than 340 certified Salesforce professionals.

Strengths

Vertical orientation: Cognizant's corporate structure aligns with various verticals, and its Salesforce practice has developed 15 industry cloud frameworks and solutions; it has over 150 industry accelerators. Besides engaging with clients for traditional cloud products, the company executives frequently involve in business-focused conversations on domains like insurance and mortgage.

Leaders in industry clouds: Cognizant has a dedicated Salesforce industry cloud CoE and continuously invests in innovation and thought leadership. It has successfully launched over 10 function-specific solutions across various segments, including automotive, retail, healthcare, insurance, banking, transportation and hospitality.

Strategic focus on AI: Cognizant has announced a $1 billion investment in AI over three years. It actively collaborates with Salesforce and is deeply involved in shaping data and AI products. Committed to AI excellence, Cognizant is aggressively re-tooling its talent base, participating in Salesforce's Partner Advisory Board on Generative AI, and contributing to product road maps and key innovations. It has already identified and prioritised over 100 AI use cases across industries.

Caution

Cognizant has a strong standing across various KPIs in this quadrant. However, it can potentially increase the visibility of its dedicated case studies, showcasing some of the most significant implementations of industry clouds.

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.

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:

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

Industry Average CX Score

80.5

▲ Highest CX: 92
▼ Lowest CX: 60

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

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 U.K 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 2024, 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

Rodrigo Barreto
Lead Analyst

Rodrigo specializes in management consulting and enterprise architecture that he uses to drive insights into the business and technical capabilities of IT companies delivering enterprise solutions.

Based in the U.K., Rodrigo joined the ISG Provider Lens™ in 2022 as an independent consultant. He holds a Master's degree in Business Administration and an undergraduate degree in Electrical Engineering. His expertise in designing complex solutions and advising on the full lifecycle of large IT implementations is leveraged to assess and report on providers and software vendors.

Rodrigo's experience spans more than three decades in the information and communications technology sector in a variety of senior architecture and consulting roles. He advises investors, providers, industry bodies and consultancies. Rodrigo has worked with customers in the Americas, Europe, the Middle East and Asia.

Enterprise Context and Global Overview Analyst

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, focal points and quadrants reports. 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 ecosystem.

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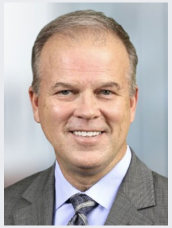
A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews. He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



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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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

MARCH, 2024

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