

Salesforce Ecosystem Partners

A research report comparing strengths and advantages of Salesforce partners



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The Salesforce Ecosystem study will examine various offerings of the Salesforce platform, categorized 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 categorized into large enterprises and the midmarket. This categorization 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.

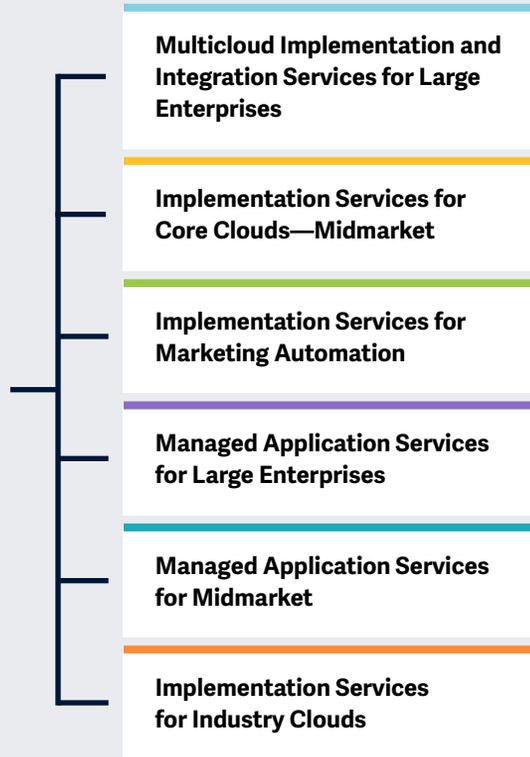
Expanding on the segmentation outlined above, the study will also include quadrants examining focused offerings, which are the sweet spot for a large pool of participants within the ecosystem and are sought after by clients.

As a yearly investigation, running for the sixth consecutive year, the study is constantly updated to analyze 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.



Key focus areas for **Salesforce Ecosystem Partners 2024.**

Simplified Illustration Source: ISG 2023



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

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

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



Multicloud Implementation and Integration Services for Large Enterprises

Definition

This quadrant will assess 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 will recognize 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 organizations, 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 realization of complex application landscapes
4. Availability of **predefined solutions** and accelerators, preferably both functionally oriented and industry specific
5. Delivery **capabilities at scale** to serve large enterprise clients
6. Compelling list of **use cases and references**



Implementation Services for Core Clouds—Midmarket

Definition

This quadrant will assess providers specializing 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 optimize 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 midsized 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**



Implementation Services for Marketing Automation

Definition

This quadrant will examine providers specializing 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 endeavors. These scenarios require deep integration into a client's enterprise IT landscape.

Expertise in marketing-specific aspects such as media utilization 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 optimize 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 optimization and automation of customer interactions
2. Provision of **training and enabling client personnel** to use the application
3. Availability of **predefined solutions and accelerators**, preferably both functionally oriented and industry-specific
4. Presence of **unique differentiators**
5. Economic **stability and significant delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**



Managed Application Services for Large Enterprises

Definition

This quadrant will assess providers that offer managed application services for maintenance and support functions. These include continuous monitoring, remote support, centralized 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 centralized 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**



Managed Application Services for Midmarket

Definition

This quadrant will focus 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, centralized 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 the well-defined SLAs, network, 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**



Implementation Services for Industry Clouds

Definition

This quadrant will assess 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 verticalization 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 optimize 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 specialized 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 organizations 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**



Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following five regions on Salesforce Ecosystem Partners 2024.

Quadrant	Brazil	France	Germany	U.K.	U.S.
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	✓	✓	✓	✓	✓



The research phase falls in the period between November and December 2023, during which survey, evaluation, analysis and validation will be carried out. The results will be presented to the media in March 2024.

Milestones	Beginning	End
Survey Launch	November 2, 2023	
Survey Phase	November 2, 2023	December 1, 2023
Sneak Previews	February 2024	
Press Release & Publication	March 2024	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2023 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com



Contacts For This Study



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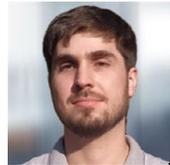
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**Rainer
Suletzki**
**Lead Analyst
(U.S. and Germany)**



**Puranjeet
Kumar**
**Senior Research
Analyst**



**Gabriel
Sobanski**
Research Analyst



**Monika
Pathak**
Project Manager



**Ilamaran
Mages**
Data Analyst



ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



Yadu
Singh

**Director, Technology
Modernization**



Bill
Huber

**Partner, Digital Platforms
and Solutions**



Aman
Munglani

**Director and
Principal Analyst**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Accenture*

adesso*

AgileThought

Akkodis

AllCloud*

Alscient

Alvares & Marsal

Amber

Andela

Aoop

aquilliance*

Assist Digital*

Atile digital*

Atlantic Technologies*

Atos*

Ayesa

Bearing Point*

BeeCloud*

Birlasoft*

Bluewave*

Brighter Cloud*

Brightgen*

Brillio*

BRQ*

Builders*

BYNG4 Consulting*

C3C Software

Cadastra*

Capgemini*

CGI*

Círculo CRM

Cloobees

Cloud Consulting Group*

Cloud Monsters*

Cloud Orca

Cloudity*

Coastal Cloud*

Coforge*

Cognizant*

Cogy

Comforth Easyfront*

Concentrix*

Customertimes*

Daspe Web

DataArt

Deloitte*

Dentsu*

Deutsche Telekom*

Devoteam*

Dexian

DIA*

DIGITALL*

Dotsource*

Dotsquares*

DP6

DreamExperience

DXC Technology

Eigenherd*

Elera.

Empau*



Invited Companies

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* Rated in previous iteration

Enext*	Globant*	Jade Global*	Marlabs*
Entero*	Grazitti Interactive*	JFOX*	Mastek*
EPAM*	HCLTech*	Jüssi	match.mt*
Epsilon (Publicis Group)	Hexaware*	K2 Partnering Solutions	Math*
Everymind*	Huron*	Keyrus*	Media.Monks
Eviden (Edifixio)	Hyphen8	KPC Consulting*	Merkle
Exprivia	IBM*	KPMG*	Meta
EY	ília	LabsXD	Mindsquare*
Factory42*	ilum:e Informatik*	Leoo	Minsait
Fujitsu*	Imaginedone	Levana*	Moldsoft
Gentrop*	Inetum*	Lima Consulting Group	Mphasis*
GFT*	Infosys*	LTIMindtree*	Multiedro
GhFly	Ingram Micro	Makepositive*	Nação Digital
Giveclarity*	Inpulso	Manao*	Nagarro*
Global Hitss	iSmartBlue*	Marketdata	Nebula Consulting



Invited Companies

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* Rated in previous iteration

Niji*	Reply*	SysMap*	VO2 GROUP*
NTT DATA*	Salesfive*	Tavant*	VRP Consulting*
Numen	Sercante*	TCS*	Westbrook
Orange Business	Silver Softworks	Tech Mahindra*	Wipro*
OSF Digital*	Silverline*	Tech6	Wunderman Thompson*
Perficient*	Slalom*	Texeï	XCL*
Persistent Systems*	Softtek	ThirdEye Consulting	Zennify*
Pexlify (a Merkle co)*	Solutis	Triscal	Zensar Technologies*
PMWeb	Sopra Steria*	T-Systems*	
PPN Tecnologia	Sottelli	UST*	
Pracedo*	Spaulding*	valtech*	
Publicis Sapient	SR Consulting*	VASS	
PwC*	Stratesys	Viseo*	
R3 Digital	SunTseu*	Visionet*	
Reej Consulting*	Sys4B	Visum Digital	



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](#).

iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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iSG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 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.





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REPORT: SALESFORCE ECOSYSTEM PARTNERS