



**\*ISG** Provider Lens™

2020

Salesforce Ecosystem  
Partners 2021

imagine your future®

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## Table of Contents

Definition .....	4
Quadrants Research .....	5
Quadrants by Region .....	8
Schedule .....	9
Partial list of companies being invited for the survey .....	10

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# Definition

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

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

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

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

# Quadrants Research

As part of the ISG Provider Lens™ Quadrant Study, we are introducing the following five segments on the Salesforce Ecosystem.

Simplified illustration

Salesforce Ecosystem Partners 2021	
Implementation & Integration Services for Large Enterprises	
Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Cloud Midmarket
Managed Application Services for Large Enterprises	Managed Application Services for Midmarket

Source: ISG 2020

## Definition of segments

### Implementation & Integration Services for Large Enterprises

This quadrant includes providers of implementation services for Salesforce applications as well as the integration of these applications with other major standard software solutions that are usually part of the complex system landscape of large and globally operating enterprise clients. The scope takes into consideration that these clients in most cases use various cloud products of the entire Salesforce portfolio, and the providers therefore need to offer strong capabilities across the portfolio. The respective services include consulting, configuring and implementing applications for a client, integration within a customer's system landscape, data migration and go-live support.

### Implementation Services for Core Clouds Midmarket

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

### Implementation Services for Marketing Cloud Midmarket

This quadrant addresses providers that specialize in Salesforce marketing cloud for cases where the need for real-time integration into a complex system landscape is limited, which is more typical for medium and small-size clients. In addition, provider expertise in general aspects, deep knowledge of marketing specific aspects such as the use of media and multi-channel approaches for information gathering, customer experience, and digital customer journey optimization are essential for their inclusion in this quadrant.

### Managed Application Services for Large Enterprises

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

## Managed Application Services for Midmarket

The scope of this quadrant is similar to the one for large enterprise clients, where it includes providers with the capability to offer managed services for maintenance and support functions that include monitoring, remote support, centralized management of Salesforce applications, data quality management, data security and compliance-related aspects. The basic difference arises from the usually lower integration needs, and, in many cases, from a more regional focus of midmarket clients.

The following evaluation criteria apply to all the quadrants:

- Technology competency
- Delivery capabilities
- Use cases
- Unique differentiators
- Economic stability
- Market position

The three implementation-oriented quadrants have the following additional criteria:

- Predefined solutions, accelerators and templates
- Partnerships

The following additional criteria are applicable for the two operational support services quadrants:

- Maturity of delivery and contract models
- Experience with support for Salesforce-based applications
- Broad customer base

# Quadrants by Region

Quadrants	U.S.	Germany	Brazil
Implementation & Integration Services for Large Enterprises	✓	✓	✓
Implementation Services for Core Clouds Midmarket	✓	✓	✓
Implementation Services for Marketing Cloud Midmarket	✓	✓	✓
Managed Application Services for Large Enterprises	✓	✓	✓
Managed Application Services for Midmarket	✓	✓	✓



# Schedule

The research phase is between **October 2020 and November 2020** during which survey, evaluation, analysis and validation will take place. A presentation of the results to the media is planned for **February 2021**.

We will roll out the survey on an online platform. The invites will be sent with links for you to fill in the responses and submit.

## Milestones

Survey phase

Sneak previews

Content provisioning

Press Release

## Beginning

Oct 20, 2020 – Nov 17, 2020

Jan 7, 2021 – Jan 31, 2021

Jan 7, 2021 – Jan 15, 2021

Feb 15, 2021

## 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.

# Partial list of companies being invited for the survey

Feel free to contact us to ensure your active participation in the research phase.

4C Group	ilum:e informatik AG
7Summits	Infosys
Accenture	LTI
Acumen	Magnet 360
Acumen Solutions	Mavens
Appirio	Nagarro
aquilliance GmbH	NTT
Arlanis Reply	NTT DATA
Atos	OSF Commerce
Birlasoft	Parx
Bluewolf	Perficient
Capgemini	Persistent
Cloud Consulting Group GmbH	Polsource
Coastal Cloud	Publicis Sapient
Cognizant	PwC
Customertimes	Salesfive GmbH
Deloitte	Silverline
Deloitte Digital	Simplus
ec4u	Slalom
Eigenherd GmbH	TCS
Empaua	Tech Mahindra
Factory42	Traction on Demand
Fujitsu	T-Systems
Hexaware	youperience GmbH
Huron	

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## Do you need any further information?

If you have any questions, please contact us at [isglens@isg-one.com](mailto:isglens@isg-one.com).