ISG Provider Lens™

Salesforce Ecosystem Partners

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

adesso

QUADRANT REPORT | MARCH 2022 | GERMANY

Table of Contents

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Robust Growth in Demand for Salesforce-Related Services and The Resulting Challenges for Providers

Since its inception in 1999, Salesforce has demonstrated impressive growth and is now one of the leading providers of cloud-based application systems in the form of software-as-a-service (SaaS). There has been a focus on cloud-based application system implementation by deploying agile methods and a high degree of standardization, which allows the company to roll out updates at relatively short intervals.

Growth in demand for Salesforce-related services has continued steadily over the past few years, and even the hindrances caused by the COVID-19 pandemic had only a mere, manageable impact on the growth rate. Project budgets were partially frozen or the projects were temporarily interrupted, but this had very limited consequences. In some areas, the increasing shifting of processes or at least sub-processes toward online processing has led to additional demand for IT solutions. As Salesforce predominantly focuses on client-related processes in functional terms, there has been additional growth impetus for the company in these areas during the pandemic.

The high growth in demand for Salesforce-related services also generates a need for implementation services. Meanwhile, the need for qualified resources with Salesforce competence to be available may be seen as a limiting factor for the number of implementations. This has resulted in significant consolidation pressure in the market for related services, and large system integrators, in particular, are trying to extend their resource base by taking over other providers. However, in Germany, this trend is still less visible than in the U.S. Apart from acquisition activities, which ultimately do not generate additional capacity in the market, many providers are focusing on enhanced recruiting. On the one hand, young talents are hired and trained as Salesforce consultants via suitable qualification measures, and on the other hand, re-qualification of experienced consultants from other areas to Salesforce competence is also being conducted within some companies. Salesforce prefers to partner with such companies, which contributes significantly to additional implementation capacities.

Currently, especially in the U.S., Salesforce is strengthening its own implementation service proposals. Following the acquisition of Acumen, a midsize provider, the company is further expanding its own capacities. However, in Germany, this development is still in the nascent phase. Furthermore, it is not yet possible to conclusively assess how sustainable the expansion of Salesforce's own development capacities will be.

Another significant trend is the alignment of Salesforce proposals to different industries. This was started a few years ago, with the introduction of industry-specific products such as Financial Services Cloud and Health Cloud. In 2020, such initiatives of the company were strengthened by the acquisition of Vlocity, which is an ISV that until then had developed various industry-specific products based on the Salesforce platform. This seems to be a sustainable trend, and Salesforce's portfolio is continuously evolving with an increased focus on industry-specific products. However, it needs to be evaluated whether this will lead to restrictions in the functional development of classic products such as Salesforce Sales Cloud and Salesforce Service Cloud in the medium term.

In the past 12 months, since the publication of the last IPL study on this topic, the German market for Salesforce implementation services has not changed significantly in structural terms beyond the general trends mentioned. Unlike in the U.S., the trend of consolidation, predominantly via the acquisition of midsize providers by global system integrators, has not yet gained traction in Germany. Individual acquisitions still occur in the German market, but the number is not as high as in the U.S. Moreover, it is not yet clear if the pace of consolidation will increase in Germany in the future.

With regard to the implementation methods used, the so-called hybrid-agile model continues to be the method mostly applied by globally operating clients, for which the integration of Salesforce into a complex system landscape with global operations is a mandatory requirement. The hybrid-agile model is a combination of agile elements for implementation phases with phase-oriented elements related to strategy, design and rollout. Most providers now offer this methodology in their portfolio. For a single implementation of Salesforce, applying the pure agile methodology is still dominant; it is mainly used for midsize clients where no global rollout is required and there are only limited integration requirements.

The MuleSoft platform continues to be the dominant tool for integrating Salesforce applications with other applications. Thus, compliance with this platform has become a basic requirement for Salesforce implementation providers to achieve a favorable position in the market. Large system integrators routinely operate a dedicated division or department in which the respective capacities are bundled.

For all providers, whether they are system integrators or boutique providers, a robust network of ISV partnerships within the Salesforce ecosystem remains essential. There is a continuous need to cover requirements beyond the standardized functionality of Salesforce products with additional products from ISVs. These are routinely offered with separate licensing and provided via a portal operated by Salesforce, which is called AppExchange. By doing so, Salesforce ensures that individual apps meet the basic requirements for software quality, such as error recovery, maintenance cycles and compatibility with Salesforce products.

In this year's study, the quadrant for implementation and integration for large clients was renamed "Multi-Cloud Implementation & Integration Services for Large Enterprises" to make the distinction in content from the quadrants for small and midsize enterprises (SMEs) even clearer. The content of this quadrant remains unchanged. The support of global rollouts and the coverage of the often complex integration requirements continue to be the main success factors for providers in this quadrant. This year, Accenture, Capgemini, Cognizant, Deloitte Digital, Infosys, Mindtree, Reply, TCS and Wipro qualified as Leaders. HCL has achieved the Rising Star status in this quadrant.

The market for Implementation Services for Core Clouds Midmarket also remains unchanged in terms of content. As already explained, the trend of consolidation in this area is not yet as pronounced in Germany as in the U.S. In addition to pronounced development competence, the early phases of a development, namely, strategy finding, design and planning of a roadmap, have become increasingly significant competences for the success of providers in this area. This year, Adesso, BearingPoint, Deutsche Telekom, DIGITALL, Factory42, Persistent Systems and Reply qualified as Leaders. As Rising Stars, aquilliance and DIA die. interaktiven has the prospect of qualifying as a Leader in the future if its development continues to be positive.

In the market for Implementation Services for Marketing Cloud Midmarket, which is also unchanged in terms of content, the following providers have qualified for a leading position this year: Adesso, BearingPoint, Deutsche Telekom, DIGITALL, factory42, Persistent Systems and Reply. The provider DIA die. interaktiven has also achieved the Rising Star status in this quadrant.

The market for Managed Application Services for Large Enterprises, like the respective market for implementations, is largely dominated by large and internationally operating system integrators. Other players do occupy significant sub-areas, but mostly fall short of the position of Leader. Accenture, Capgemini, Cognizant, HCL, Infosys, TCS and Wipro qualify for Leader status.

Although they have favorable cost structures due to their global delivery models, large systems integrators do not play a significant role in the Managed Application Services for Midmarket quadrant. On the one hand, this is due to the rather less complex requirements in this market; on the other hand, the companies mentioned do not seem to have a high priority in this market. Consequently, the following companies qualified as Leaders: Adesso, BearingPoint, Deutsche Telekom, DIGITALL, Factory42, Persistent Systems and Reply.

Compared to last year, the structure of this year's study was extended to include the Implementation Services for Analytics Solutions on Salesforce quadrant, which focuses on the implementation of analytics applications for Salesforce. Information on the providers in this comparatively young segment often is still quite incomplete or only a few details are provided by the companies. Therefore, only a few companies could be assessed in a qualified manner this year, of which the following have achieved the status of Leader: HCL, Infosys, Tech Mahindra and Wipro.

In the coming years, the availability of qualified resources and the progressive focus on industry-specific proposals are expected to significantly shape the market for Salesforce-related services. It will also be interesting to follow the further steps of Salesforce in terms of its positioning.

Provider Positioning

Page 1 of 4

	Multi-Cloud 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	Implementation Services for Analytics Solutions on Salesforce
Accenture	Leader	Not In	Not In	Leader	Not In	Not In
adesso SE	Not In	Leader	Leader	Not In	Leader	Contender
aquilliance	Not In	Rising Star ★	Product Challenger	Not In	Product Challenger	Not In
Atos	Product Challenger	Not In	Not In	Product Challenger	Not In	Contender
BearingPoint	Not In	Leader	Leader	Not In	Leader	Not In
Capgemini	Leader	Not In	Not In	Leader	Not In	Not In
CGI	Contender	Not In	Not In	Contender	Not In	Not In
Cloud Consulting	Not In	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Cloudity	Not In	Product Challenger	Contender	Not In	Contender	Not In

Provider Positioning

Page 2 of 4

	Multi-Cloud 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	Implementation Services for Analytics Solutions on Salesforce
Cognizant	Leader	Not In	Not In	Leader	Not In	Not In
Customertimes	Product Challenger	Not In	Not In	Contender	Not In	Product Challenger
Deloitte Digital	Leader	Not In	Not In	Not In	Not In	Not In
Deutsche Telekom	Not In	Leader	Leader	Not In	Leader	Market Challenger
DIA	Not In	Rising Star ★	Rising Star ★	Not In	Product Challenger	Not In
DIGITALL	Not In	Leader	Leader	Not In	Leader	Market Challenger
Eigenherd	Not In	Contender	Contender	Not In	Not In	Not In
Empaua	Not In	Product Challenger	Product Challenger	Not In	Contender	Not In
EPAM	Contender	Not In	Not In	Not In	Not In	Not In

Provider Positioning

Page 3 of 4

	Multi-Cloud 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	Implementation Services for Analytics Solutions on Salesforce
Factory42	Not In	Leader	Leader	Not In	Leader	Not In
Fujitsu	Contender	Not In	Not In	Contender	Not In	Not In
HCL	Rising Star ★	Not In	Not In	Leader	Not In	Leader
IBM	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In
ilum:e Informatik	Not In	Contender	Not In	Not In	Contender	Not In
Infosys	Leader	Not In	Not In	Leader	Not In	Leader
Mindtree	Leader	Not In	Not In	Product Challenger	Not In	Not In
Nagarro	Not In	Market Challenger	Market Challenger	Not In	Market Challenger	Not In
NTT DATA	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In

Provider Positioning

Page 4 of 4

	Multi-Cloud 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	Implementation Services for Analytics Solutions on Salesforce
Persistent Systems	Not In	Leader	Leader	Not In	Leader	Product Challenger
PwC	Market Challenger	Not In	Not In	Not In	Not In	Not In
Reply	Leader	Leader	Leader	Product Challenger	Leader	Market Challenger
Salesfive	Not In	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Sopra Steria	Contender	Not In	Not In	Not In	Not In	Not In
TCS	Leader	Not In	Not In	Leader	Not In	Not In
Tech Mahindra	Product Challenger	Not In	Not In	Market Challenger	Not In	Leader
Wipro	Leader	Not In	Not In	Leader	Not In	Leader

This study focuses on what ISG perceives as most critical in 2022 for the Salesforce Ecosystem.

- **Multi-Cloud 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**
- **Implementation Services for Analytics Solutions on Salesforce**

Simplified Illustration Source: ISG 2022

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 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 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.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: Multi-Cloud 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, and: Implementation Services for Analytics Solutions on Salesforce.

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

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

Our study serves as the basis for important decision-making in terms of positioning, key relationships, and 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 positioning reflects the appropriateness of the respective IT provider for a defined market segment (quadrant). Unless otherwise stated, the positioning is applicable to all company size classes and industries. If there is a difference in the IT service requirements of large companies and SMEs and the spectrum of IT providers active on the local market is sufficiently large, a further differentiation of IT providers by services is made as per the target group for products and services. Either industry requirements or the number of employees as well as the corporate structures of the clients are duly considered and the IT providers are positioned according to their focus. With the result, a discernment is made between two clienteles, if applicable, which are defined as follows:

- **Midmarket:** companies with 100 to 4,999 employees or a turnover between 20 and $999 million, central headquarters in the respective country, mostly privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or turnover of more than $1 billion, globally active and with globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created based on a scoring matrix and contain four fields into which providers are classified: Leader, Product Challenger, Market Challenger and Contender.

Each quadrant of an ISG Provider Lens™ study may also include a provider that ISG believes has great potential to achieve a Leader position. Such providers may be classified as Rising Star. Number of providers per quadrant: ISG evaluates and positions the most significant providers according to the scope of the respective study; the number of providers positioned per quadrant is limited 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.

Multi-Cloud Implementation & Integration Services for Large Enterprises

Who Should Read This

This quadrant is relevant to large enterprises of all industries in Germany that are evaluating Salesforce multicloud implementation and integration service providers.

In theereport, ISG defines current market positioning of these- services providers and how they address the key challenges faced by large enterprises in the country that have adopted various cloud products from the Salesforce portfolio already in use. Over the years, Salesforce has expanded its product strategy beyond CRM applications and ensured its presence in related applications, development, integration and reporting as well. ISG sees a rise in the demand for Salesforce implementation and integration services from enterprises, as such services can enable the adoption and use of Salesforce cloud solutions and their peripheral tools.

Enterprises in Germany are still impacted by the COVID-19 pandemic, and with teleworking still being a preferred mode of operation, Salesforce offers enterprises a platform to keep their business running. Enterprises have got new customers as e-commerce has gained momentum due to the pandemic and customer experience (CX) has remained a priority among enterprise clients in Germany.

In Germany, there are many midsize boutique providers that implement Salesforce only in the country. These providers differ significantly in terms of local market presence, including the ability to provide services through resources conversant in the local language and comply with local regulations. Service providers with high nearshore capabilities, mostly delivered from Eastern Europe, benefit from their global delivery model.

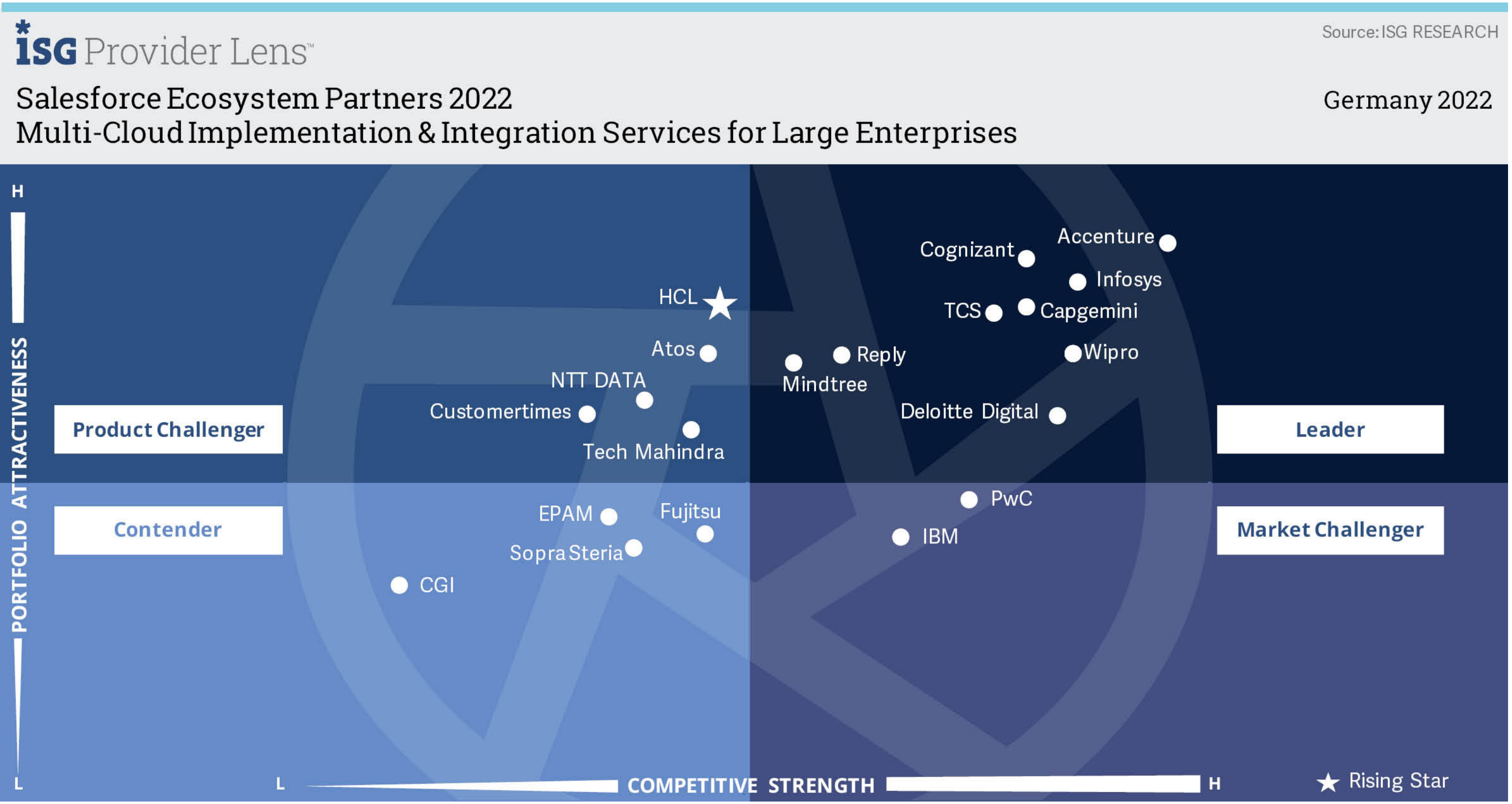
Like in other countries, the complexity of the underlying application system landscape in Germany is proportional to the size of a company. The hybrid Agile model is the most common approach for global implementations today. In contrast, the pure Agile methodology is suitable for a single implementation of Salesforce. As a result, large enterprises often prefer vendors that have demonstrated strong integration capabilities and can operate globally on their own without having to rely on partners.

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

IT and technology leaders should read this report to better understand the relative positioning and capabilities of providers that can help them effectively adopt services from Salesforce clouds and integration and analysis solutions. The report also shows them how the technical capabilities of the service providers in the market can be compared.

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



This quadrant includes providers of **implementation services for Salesforce applications** and the **integration of these applications** with other major standard software solutions focused on large and globally operating enterprise clients.

Rainer Suletzki

Definition

This quadrant includes providers of implementation services for Salesforce applications and 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 Salesforce portfolio.

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 in combination 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

Observations

The following providers qualified as Leaders in this quadrant:

Accenture

Accenture offers a wide range of powerful predefined solutions to many industries to increase productivity during project execution. The company also has a high level of integration competence.

Capgemini

Capgemini has considerably increased the number of consultants with Salesforce experience in recent years and has extensive competence in several industries.

Cognizant

In addition to a robust Salesforce-specific methodology and powerful industry solutions, **Cognizant** is known for its recent significant growth in the Salesforce market.

Deloitte Digital

Deloitte Digital has a significant focus on business process designs, has numerous preconfigured solutions and thus is a leading company in linking business strategies and technologies.

Infosys

In addition to a powerful delivery model and high industry competence, **Infosys** offers an exhaustive library of pre-built solutions for implementation and integration, lifecycle management and training.

Mindtree

Mindtree focuses on multi-cloud implementations with its strong methodology competence and has high capacity in MuleSoft development to cover integration requirements.

Reply

Reply has shown impressive growth in the Salesforce implementation market in recent years. The company has a clear focus on implementation by deploying agile methods and has extensive experience with multi-cloud projects.

TCS's

TCS's portfolio includes an exhaustive solution library for use, which is aimed at globally operating large clients. The company also has a clear focus on innovation.

Wipro

Wipro combines extensive functional knowledge with industry competence and a global delivery model. In addition, the provider has a strategic consulting division that supports clients in their transformation process.

The following provider was able to achieve the Rising Star status and, thus, prospectively has the potential for a leading position in this segment:

HCL

HCL (Rising Star) has several years of extensive experience in the implementation of Salesforce and has recently invested significantly in ensuring Salesforce-experienced resources and related certifications.

Implementation Services for Core Clouds Midmarket

Who Should Read This

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

In this quadrant report, ISG defines the current market positioning of Salesforce core cloud implementation service providers in Germany, with many expanding their services throughout the DACH region. The report assesses providers that specialize in Salesforce Sales Cloud, Salesforce Service Cloud and Salesforce Commerce Cloud offerings. These providers adopt an Agile approach for implementation, helping clients redesign processes and enabling the implementation with Salesforce applications.

Cloud-based solutions that have seamless integration capabilities with third-party applications have been the top priority for enterprises seeking Salesforce core cloud implementation services. Small and midsize enterprises are generally seeking Salesforce core cloud implementation services for projects without large integration needs. Given their scale, these enterprises tend to have less complexity in terms of digital transformation and can benefit more quickly from easy-to-use services and cost-saving advantages.

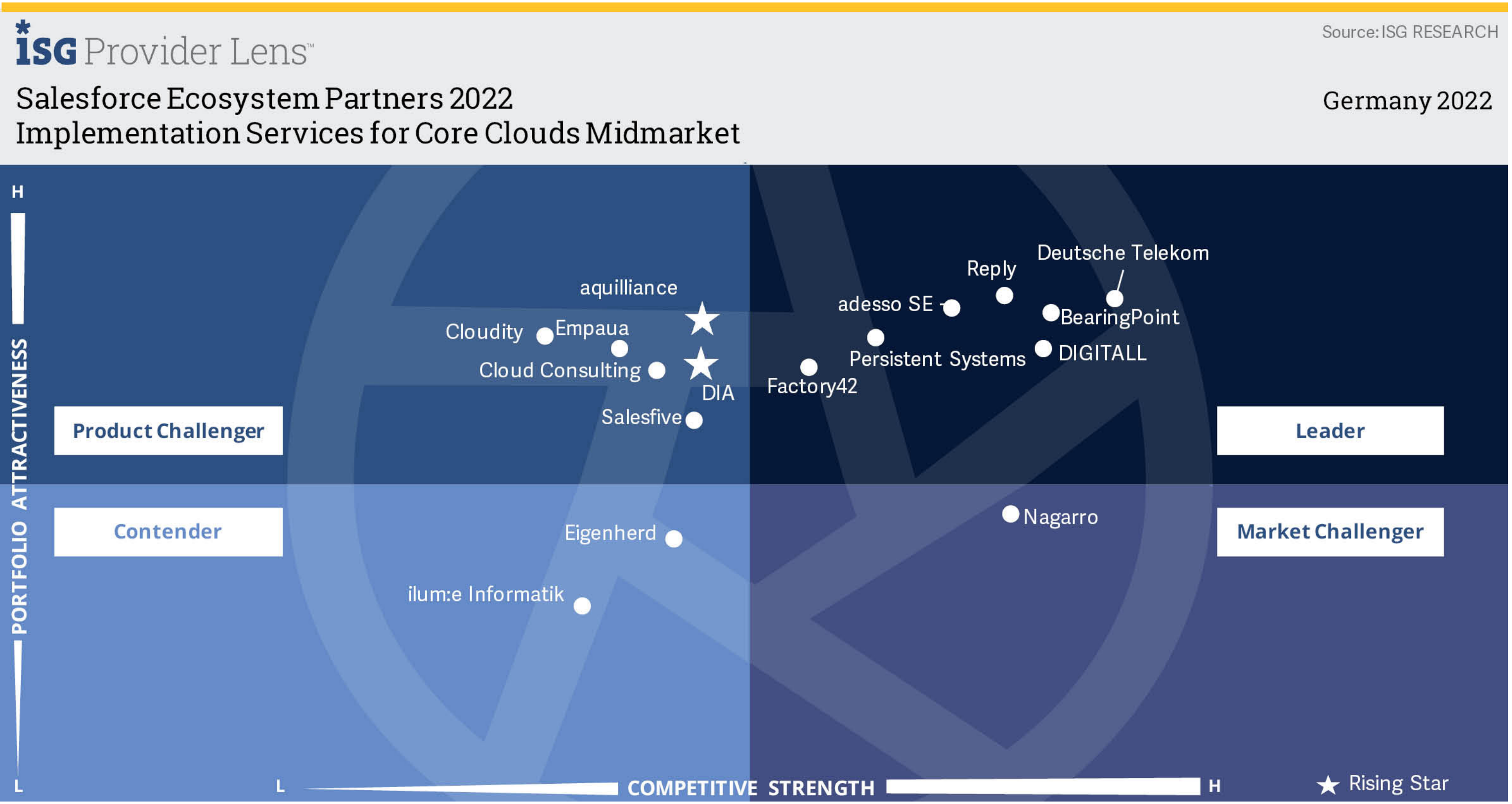
In Germany, there is a significant increase in the demand for Salesforce implementation services for core clouds, which is driving growth for most service providers in the midmarket. ISG observes ongoing consolidation in the market, with large system integrators acquiring midsize providers to leverage the latter's established brand presence and strengthen their positions in the market. In addition to utilizing offshore capacities in line with Salesforce Talent Alliance, many service providers are increasingly training and using nearshore German-speaking resources with proximity to their customers for project optimization.

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them effectively implement Salesforce Sales Cloud and Salesforce Commerce Cloud solutions, including highlighting how service providers deliver industry-specific solutions.

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

IT and technology leaders should read this report to understand the relative positioning and capabilities of partners that can help them effectively adopt Salesforce Sales Cloud, Salesforce Service Cloud and Salesforce Commerce Cloud solutions and how the providers in the market can be compared in terms of their technical capabilities and development methodologies.

Security and data professionals should read this report to understand how service providers meet the data protection and security requirements in Germany for their Salesforce implementation and integration practices. The report also highlights the providers' focus on data quality and how they can be compared with one another.



This quadrant addresses providers that offer **implementation services** in Salesforce Sales, Service and Commerce Cloud. These providers mostly take an agile approach for implementation and **focus on midsize and smaller clients**.

Rainer Suletzki

Definition

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, typically for medium and small-sized clients. An important aspect of the services they offer revolves around consulting on the redesign of processes while using Salesforce applications.

Eligibility Criteria

1. Strong implementation capabilities (consulting, configuration, data migration and go-live) for the Salesforce Core Clouds (at least for Sales, Service 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. Unique differentiators
5. Economic stability and significant delivery capabilities to serve numerous clients
6. Compelling list of use cases and references

Observations

The following providers qualified as Leaders in this quadrant:

adesso SE

adesso SE operates with a globally oriented delivery model and has significant onshore and nearshore capacity. It has a robust project methodology and comprehensive industry competence.

BearingPoint

BearingPoint has high industry competence, dedicated MuleSoft capacities for integration purposes and has a high level of automation competence.

Deutsche Telekom's

Deutsche Telekom's portfolio includes a rich solution library for industry solutions, and it covers the requirements for integration with back-end systems.

DIGITALL

DIGITALL has a clearly structured portfolio of solutions based on standardized use cases and can competently integrate back-end systems.

Factory42

Factory42 focuses on the modular implementation of predefined components and offers robust solutions to various industries.

Persistent Systems

Persistent Systems pursues a clear growth strategy, which includes organic growth and acquisitions. The implementation approach aims to use Salesforce as a central platform for digital transformation.

Reply's

Reply's services focus on individual developments on the Salesforce platform for specific client requirements. The company has extensive consulting competence for process designing.

The following providers were able to achieve the Rising Star status, with the potential to become a Leader in this segment in the future:

aquilliance

aquilliance has high implementation competence and provides robust support in the operational use of Salesforce.

DIA die.interaktiven

DIA die.interaktiven has extensive implementation experience in several key industries. The company has comprehensive IoT competence.

adesso SE

Leader

"With high industry competence and robust methodologies, Adesso is a well-experienced provider of Salesforce implementation services."

Rainer Suletzki

Overview

Adesso is a provider of IT consulting, system integration and operation and software development services. The company was founded in 1997 and is headquartered in Dortmund, Germany. It has operations in 41 other locations, with a total of 5,000 employees in German-speaking countries. Adesso has approximately 230 consultants with Salesforce experience, of which around 100 have earned Salesforce certifications.

Strengths

Balanced delivery model: Adesso operates with a globally oriented delivery model that includes significant onshore and nearshore capacities. In this way, the company ensures client proximity and high cost efficiency in the services offered.

Robust project methodology: For project implementations, Adesso uses various elements of the phase-oriented approach and agile methods, combining them in an efficient manner. For example, high priority is given to the project design phase; rapid prototyping is used during implementation.

Comprehensive industry competence: Adesso has extensive experience in implementing Salesforce in multiple industries, such as banking and insurance, automotive, mechanical engineering and healthcare. It also has competence in public administration.

Large client base and numerous references: The company has carried out a large number of successful implementations, with many of its clients willing to be named as references.

Caution

For projects, the share of services contracted according to time and effort is comparatively high. Adesso should increase the proportion of projects with fixed prices or results-based remuneration.

Adesso should strive to achieve Expert Level certification from Salesforce.

Implementation Services for Marketing Cloud Midmarket

Who Should Read This

This quadrant is relevant to small and midsize companies across all industries in Germany that are evaluating the providers of implementation services for Salesforce Marketing Cloud.

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

The COVID-19 pandemic has had a negative impact on most enterprises in the German market, which has been visible throughout the value chain. The pandemic has also brought in opportunities to implement large-scale changes. Enterprises have got new customers as customer experience (CX) has remained a priority among enterprise clients in Germany.

Currently, enterprises need to be flexible in terms of their return-to-work strategies while continuing to deliver the digital-first experience that customers and employees expect. Employee experience (EX) and CX are equally important and linked. Access to data and AI tools will help companies create a human touch and take CX to a new level.

In Germany, the focus of implementation service providers for Salesforce Marketing Cloud is on enriching CX. ISG has identified a preference for business solutions rather than ones with reusable modules. This means that service providers rely on development more than component libraries to help deliver Salesforce Marketing Cloud implementations. Furthermore, since marketing functions require many customer and prospect transactions, providers' automation capabilities are important.

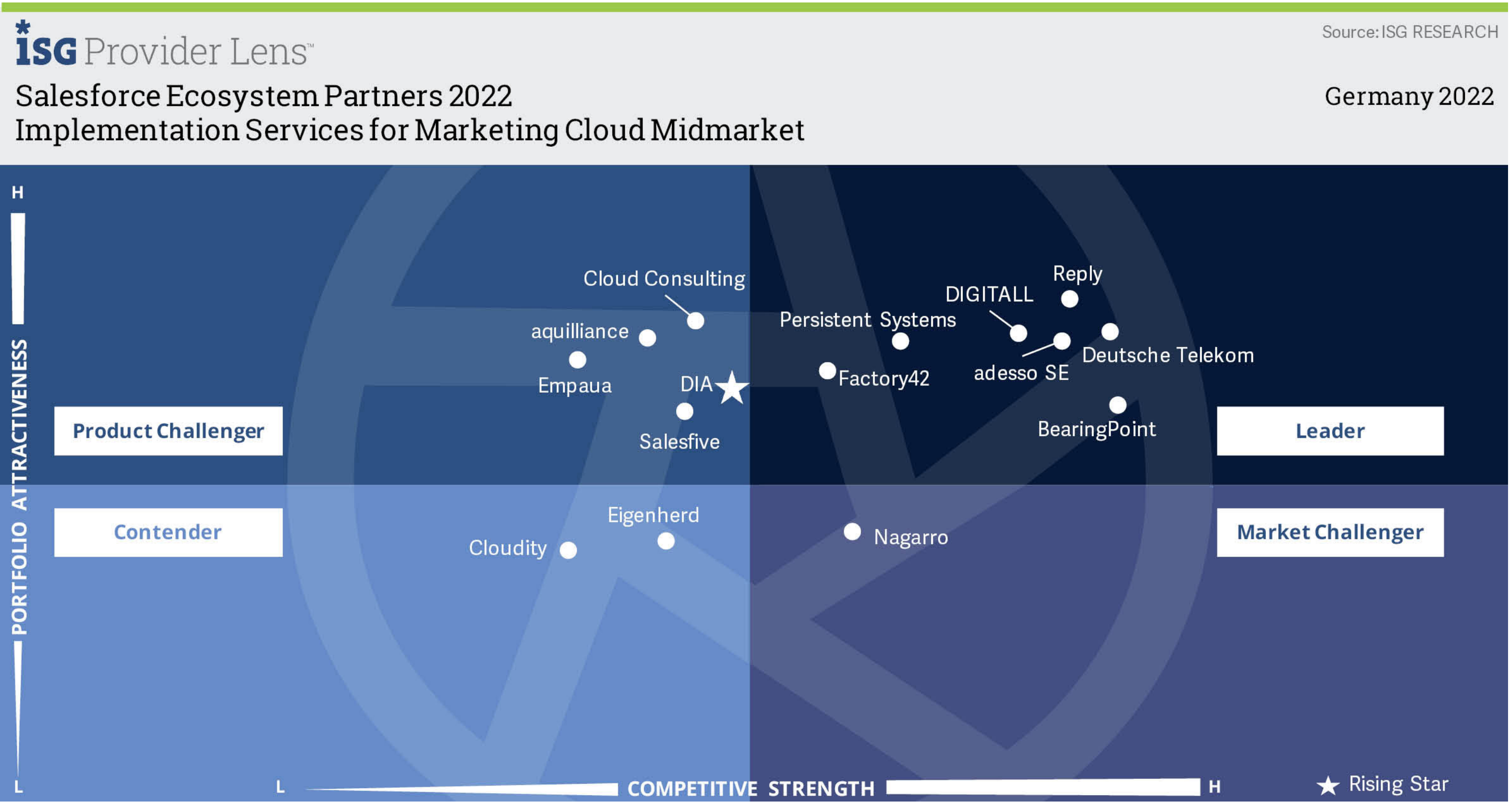
Enterprise clients are looking to create two-way engagements to deliver the best solution for individual dynamics, personalize interaction by leveraging Tableau CRM AI and BI capabilities and analyze end-to-end marketing effectiveness across all digital channels and devices. With such engagements, they are focusing on delivering data-driven personalized experiences across every stage of a customer relationship.

Marketing leaders should read this report to understand the relative positioning and capabilities of service partners that can help them implement Salesforce Marketing Cloud solutions effectively. The report also highlights the marketing expertise of various service providers, including their digital experience and accelerators.

IT and technology leaders should read this report to understand the relative positioning and capabilities of partners that can help them effectively adopt Salesforce Marketing Cloud solutions. The report can also enable them to compare the technical capabilities, automation depth and development methodologies of service providers.

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

Security and data professionals should read this report to understand how providers comply with the security and data protection laws in Germany for their Salesforce Marketing Cloud implementation practices. The report also shows the focus providers place on data quality and how they can be compared with one another.



This quadrant addresses providers that offer **implementation services** for Salesforce Marketing Cloud and provide **expertise in marketing-specific aspects** such as the use of media and multichannel approaches.

Rainer Suletzki

Definition

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. This is most typical for medium and small-sized clients. In addition, provider expertise in marketing-specific aspects such as the use of media and multichannel approaches is essential.

Eligibility Criteria

1. Strong implementation capabilities (consulting, configuration, data migration and go-live) for the Salesforce Marketing Cloud and 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. Unique differentiators
5. Economic stability and significant delivery capabilities to serve numerous clients
6. Compelling list of use cases and references

Observations

The following providers qualified as Leaders in this quadrant:

adesso SE

adesso SE offers powerful preconfigured solutions in the area of marketing, with a focus on client experience. It also offers content-driven services such as creative support and the development of campaign ideas.

BearingPoint

BearingPoint offers functionally robust solutions to increase marketing productivity by deploying Salesforce, besides focusing on automating interactions with end clients.

Deutsche Telekom

Deutsche Telekom, in addition to its high level of development competence, increasingly relies on analytics tools and innovative techniques such as AI to develop powerful marketing solutions.

DIGITALL

DIGITALL has a clear focus on all aspects of client relationship management and has high competence in client analytics and business intelligence.

Factory42

Factory42 offers the integration of marketing with client management, with a focus on the automation of functions such as social media monitoring and designing powerful client interfaces.

Persistent Systems

Persistent Systems has a comparatively large resource base for Salesforce Marketing Cloud and focuses on automation as a key element of implementations.

Reply

In addition to the implementation of Salesforce Marketing Cloud, **Reply** has extensive competence in the use of innovative technologies related to it, including machine learning.

The following provider was able to achieve the Rising Star status, with the potential to become a Leader in this segment in the future:

DIA die.interaktiven

DIA die.interaktiven places a special focus on client experience in its implementations. The company has a significant number of client projects and related references.

adesso SE

Leader

"With significant content competence, Adesso is a good partner for the implementation of Salesforce Marketing Cloud."

Rainer Suletzki

Overview

Adesso is a provider of IT consulting, system integration and operation and software development services. The company was founded in 1997 and is headquartered in Dortmund, Germany. It has operations in 41 other locations, with approximately 5,600 employees in German-speaking countries. Adesso has about 230 consultants with Salesforce experience, of which approximately 100 have earned Salesforce certifications.

Strengths

Specific project methodology for marketing: For clients that have a marketing team with limited experience, Adesso offers a specific development methodology, which includes marketing-specific best practices and suitable checklists for organizational design.

Powerful preconfigured solutions with a focus on client experience: In contrast to some competitors, Adesso relies on project support in the area of Salesforce Marketing Cloud via predefined solutions, for example, Custom Journey Builder. This approach focuses on the realization of a 360° view of end clients and a beneficial client experience.

High level of automation competence: To be able to handle the large volumes of data generated in the context of marketing applications as efficiently as possible, Adesso gives great importance to using automation solutions in implementation projects.

A range of associated business services: In addition to IT services, Adesso offers agency-like services such as creative support and the development of campaign ideas. This demonstrates the company's high level of professional competence.

Caution

In its portfolio, the company should concentrate on the realization of mobile solutions for marketing.

Adesso should leverage its marketing-specific solutions to increase the number of fixed-price or results-based remuneration projects.

Managed Application Services for Large Enterprises

Who Should Read This

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

In this quadrant report, ISG defines the current market positions of providers of Salesforce managed application services for large enterprises in Germany. This study covers providers offering additional services, including administrative assistance, accelerators for development and utilization, development services, proactive monitoring and advisory services. Conventional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring. To skillfully manage their Salesforce platforms, enterprise clients look for service providers that can keep IT costs under control and maintain the platforms efficiently. In addition to this, they need service providers to manage the application, licenses and upgrades, offer user support and develop business applications integrated with the platforms.

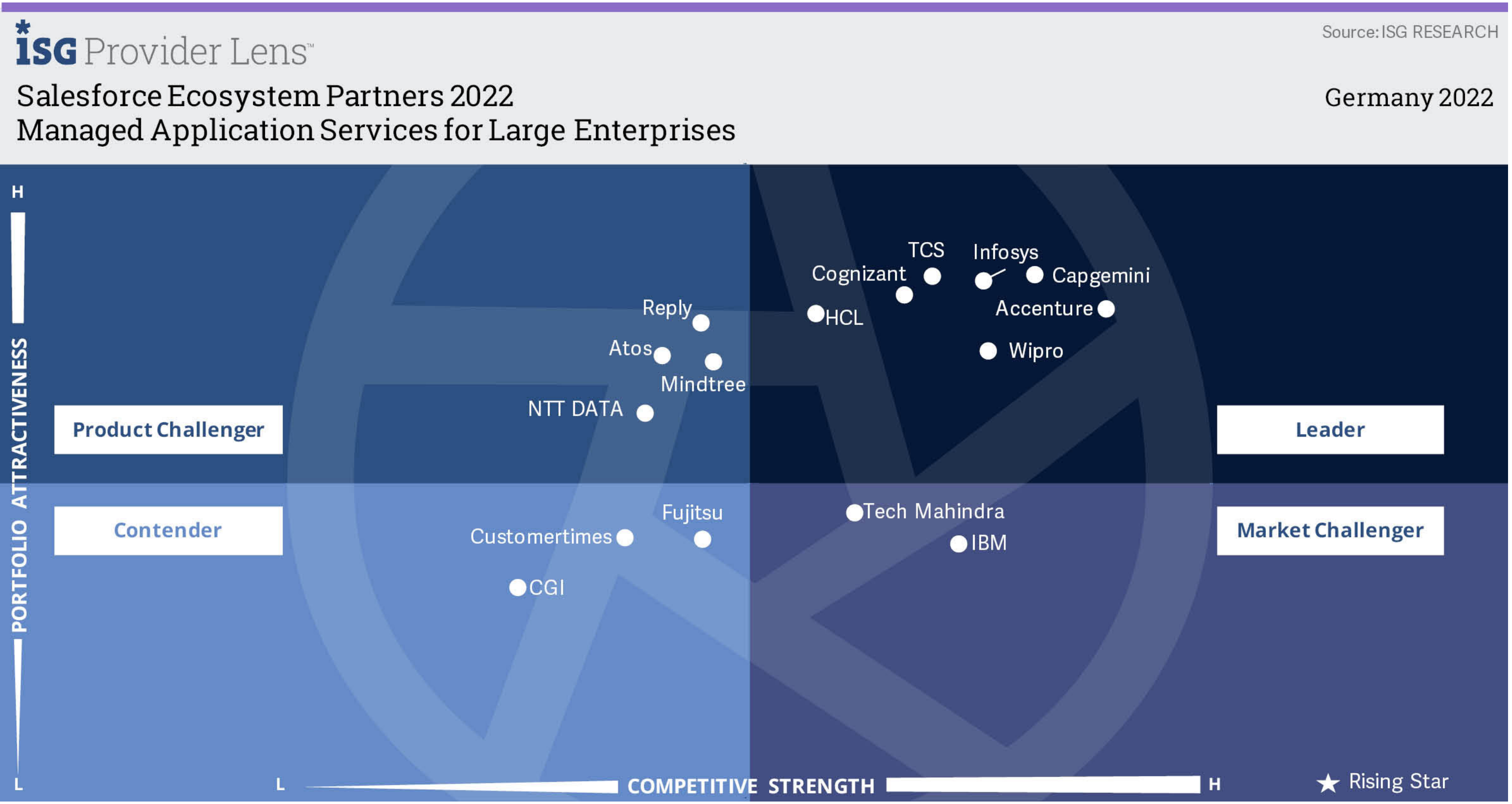
ISG has noticed that proximity to the workforce of client enterprises is an important factor in the market positioning of providers. Based on the need for direct and immediate interaction with users, several aspects of managed application services, such as user training and resolution of issues by workaround. Service providers are supporting enterprise clients by offering cost management solutions for Salesforce applications, planning upgrades, conducting regular training and expanding the use of Salesforce within organizations. Large enterprises headquartered in Germany that have global operations can partner with global providers to support deployments in Germany and in other parts of the world. All service providers must aim for high levels of user satisfaction to sustain or encourage the use of Salesforce applications and justify the investments in Salesforce managed application services.

Marketing, sales and field service leaders should read this report to understand the relative positioning and capabilities of service partners that can help implement Salesforce managed application services effectively. The report also highlights the advanced managed application service capabilities of service providers, including administration assistance, development and use of accelerators, Salesforce Lightning services, proactive monitoring and advisory services.

IT and technology leaders should read this report to understand the relative positioning and capabilities of the service providers of Salesforce managed application services. The report also compares the technical capabilities of these providers in areas such as remote and onsite monitoring, technology accelerators, incident response, automation and development methodologies.

Security and data professionals should read this report to understand how service providers comply with the data privacy and security requirements in Germany in their Salesforce managed application service practices.

Procurement professionals should read this report to understand how service providers differ in their approach to Salesforce managed application services in Germany. The report covers the differences in experience in terms of Salesforce applications, the nature of customer bases and industry relations.



This quadrant assesses the capability of providers to offer **managed services** for Salesforce applications focused on **large enterprise clients** with global reach and **complex application landscapes**.

Rainer Suletzki

Definition

This quadrant assesses the capability of providers 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 the case of large enterprise clients, this usually includes the provider's capability to offer these services in the context of global reach and complex application landscapes comprising a variety of solutions from different software providers.

Eligibility Criteria

1. Well-proven experience in operational support for end-to-end processes across complex application landscapes, with 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

The following providers qualified as Leaders in this quadrant:

Accenture

Accenture offers a global delivery model with a balanced cost structure and powerful preconfigured solutions for application management. It has a leading position in the market for large clients in Germany.

Capgemini

Capgemini offers an efficient application operations methodology, including pertinent tool support and a powerful automation platform.

Cognizant

Cognizant has a balanced delivery model with high scalability while optimizing costs, and it focuses on data quality as a means to increase efficiency and ensure service stability.

HCL

In addition to robust tool support via a powerful in-house-developed framework, **HCL** relies on a combination of post-deployment support and continuous development.

Infosys

Infosys uses a range of self-developed tools to sustainably increase efficiency in service delivery and achieve stable processes, with a focus on automation.

TCS

The **TCS** portfolio is characterized by a variety of tools that effectively support Salesforce applications. It also has an efficient global delivery concept that ensures a favorable cost structure.

Wipro

In addition to efficient tool support for application management, **Wipro** offers modular support, designed specifically to optimize cloud-based solutions.

Managed Application Services for Midmarket

Who Should Read This

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

In this quadrant report, ISG defines the current market positions of providers of Salesforce managed application services for small and midsize companies in Germany. Traditional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring. This study covers providers offering additional services, including administrative assistance, accelerators for development and utilization, development services, proactive monitoring, and advisory services.

To skillfully manage their Salesforce platforms, enterprise clients look for service providers that can keep IT costs under control and maintain the platforms efficiently. In addition to this, they need service providers to manage the application, licenses and upgrades, offer user support and develop business applications integrated with the platforms. ISG has noticed that service providers are supporting enterprise clients by offering cost management solutions for Salesforce applications, planning upgrades, conducting regular training and expanding the use of Salesforce within organizations.

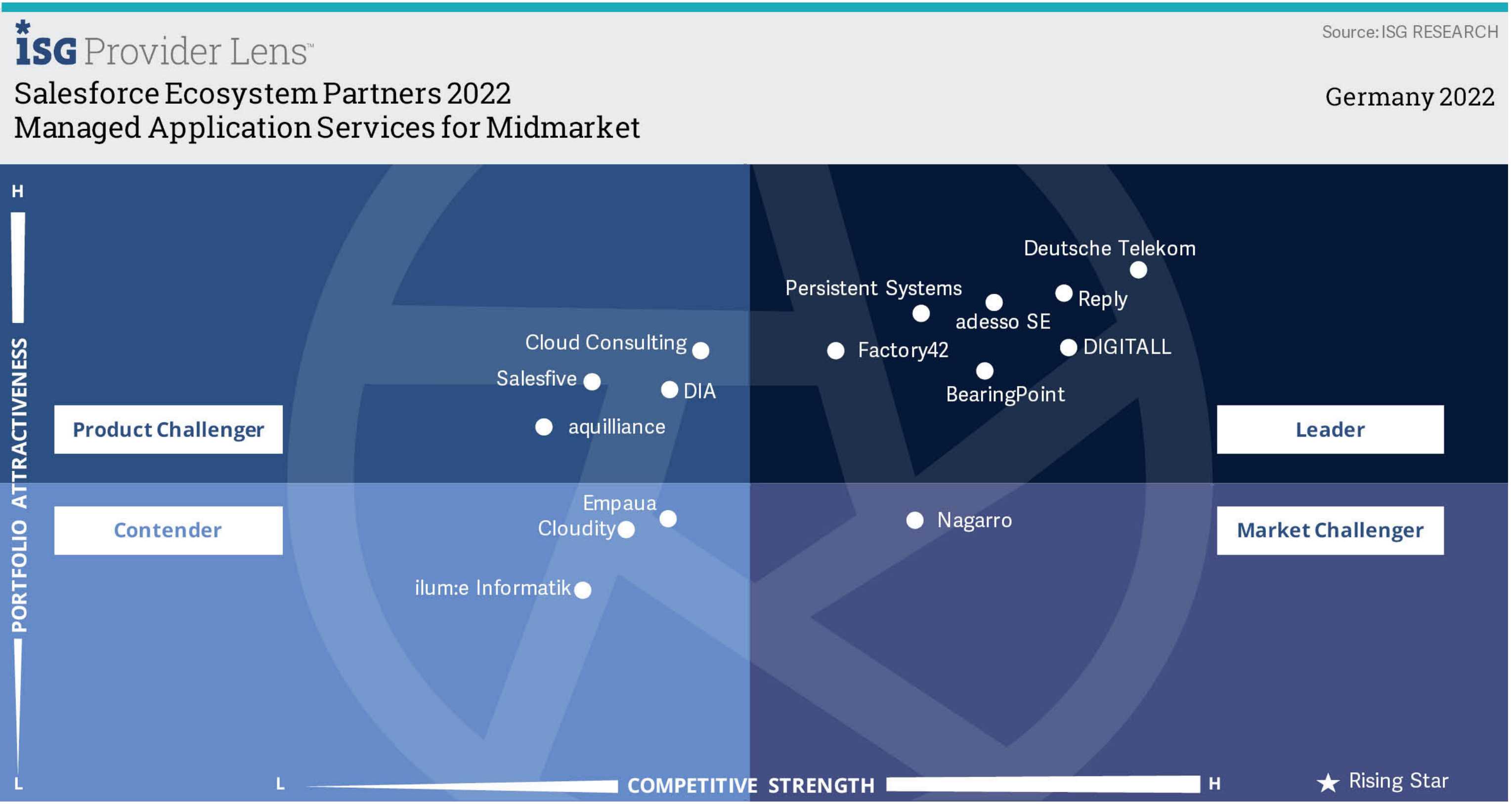
The midmarket in Germany can partner with midsize providers, as they are easier to negotiate with and are gaining a considerable number of midmarket clients because of their prices and proximity to clients' sites of operation. Clients that seek onshore managed services have the option of soliciting the services of any qualified midsize service provider. All service providers must aim for high levels of user satisfaction to sustain or encourage the use of Salesforce applications and justify the investments in Salesforce managed application services.

Marketing, sales and field service leaders should read this report to understand the relative positioning and capabilities of service partners that can help implement Salesforce managed application services effectively. The report also highlights the advanced managed application service capabilities of service providers, including administration assistance, development and use of accelerators, Salesforce Lightning services, proactive monitoring and advisory services.

IT and technology leaders should read this report to understand the relative positioning and capabilities of the service providers of managed application services. The report also compares the technical capabilities of these providers in areas such as remote and onsite monitoring, technology accelerators, incident response, automation and development methodologies.

Security and data professionals should read this report to understand how service providers comply with the data privacy and security requirements in Germany in their Salesforce managed application service practices.

Procurement professionals should read this report to understand how service providers differ in their approach to Salesforce managed application services in Germany. The report covers the differences in experience in terms of Salesforce applications, the nature of customer bases and industry relations.



This quadrant assesses the capability of providers to offer **managed services for Salesforce applications**, mainly for **midmarket clients**, which in many cases have a more regional focus.

Rainer Suletzki

Definition

This quadrant focuses on the capability of providers 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 midmarket clients usually require lower integration aspects, and, in many cases, have a more regional focus.

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 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 focus on outcome-based approaches and continuous improvement
5. Compelling list of use cases and references.

Observations

The following providers qualified as Leaders in this quadrant:

adesso SE

adesso SE operates with a support model that focuses on client proximity and quality via extensive onshore service provision. This specific positioning of application services enables a high level of client loyalty.

BearingPoint's

Based on a sophisticated pricing and contracting model, **BearingPoint's** portfolio includes a wide range of operational support services, covering the full spectrum of support services.

Deutsche Telekom

Deutsche Telekom has a flexible support model that is particularly suitable for cost optimization and application management by supporting end-to-end process chains.

DIGITALL's

DIGITALL's offer is based on a robust modular service catalog for application support. The company has an attractive delivery model with a high proportion of nearshore capacity.

Factory42

Factory42 offers a well-structured application support and maintenance with standardized packages to continuously optimize Salesforce applications.

Persistent Systems'

Persistent Systems' portfolio of managed application services includes all associated service components; the company achieves high efficiency via the consistent use of automation.

Reply

Reply offers customized service models with individual designs of components. Its portfolio also has a dedicated governance model for joint application management with clients.

adesso SE

Leader

"Adesso is a high-performance provider of application services for Salesforce, with a clear focus on high service quality."

Rainer Suletzki

Overview

Adesso is a provider of IT consulting, system integration and operation and software development services. The company was founded in 1997 and is headquartered in Dortmund, Germany. It has operations in 41 other locations, with approximately 5,600 employees in German-speaking countries. Adesso has approximately 230 consultants with Salesforce experience, of which about 100 have earned Salesforce certifications.

Strengths

Support model with a focus on client proximity and quality: Adesso's approach to managed application services focuses on enhancing the quality of services by deploying resources with project experience. This refers to both the analytical skills and problem-solving abilities of the personnel deployed. The company consistently offers its services from a location within Germany.

High client loyalty: The specific positioning of application services in terms of client proximity and quality means that many Adesso clients also purchase application services for subsequent projects from the company. Thus, the company has a large number of references. This also provides the opportunity to ensure the smooth transition into operations already in the project phase.

Cross-application competence: Since Adesso has comprehensive competence in various applications related to Salesforce, such as SAP and Microsoft, the company is able to competently cover application services for exhaustive process chains.

Caution

Adesso should examine the inclusion of German-speaking nearshore resources to be able to improve its cost position while ensuring service quality.

The company should describe the services offered in a structured service catalog that can be made publicly available.

Implementation Services for Analytics Solutions on Salesforce

Who Should Read This

This report is relevant to enterprises across all industries in Germany that are evaluating service providers offering implementation services for Salesforce analytics solutions.

In this quadrant report, ISG defines the current market positions of the service providers in Germany and identifies how the key challenges associated with implementing analytics solutions for Salesforce products are being addressed in the country.

To implement powerful cloud-based analytics solutions, customers are looking for service providers with a data-driven approach to designing and maintaining their application architectures, with the goal of seamless integration into each company's application landscape. Companies need providers that can identify sentiment trends and track real-time responses to their sales and marketing efforts. Service providers help their clients with data quality management, predictive analytics through AI, the development of dashboards and reports, building trained resources on analytics, data migration from BI applications, and the use of Salesforce in the context of analytics.

ISG is seeing a growing need among enterprises for analytics solutions that facilitate the adoption and use of Salesforce cloud solutions and their peripheral tools to extract the right information at the right time for ensuring strong customer relationships and better empowered employees. Market-leading service providers have significant expertise in integrating data with multiple interfaces, from different source systems where there is no single source of truth, and ensuring data security and consistency between platforms, even where multiple software vendors are in play. The use of a large number of data sets can improve the efficiency of algorithms/models and increase the strength of the forecast for customers.

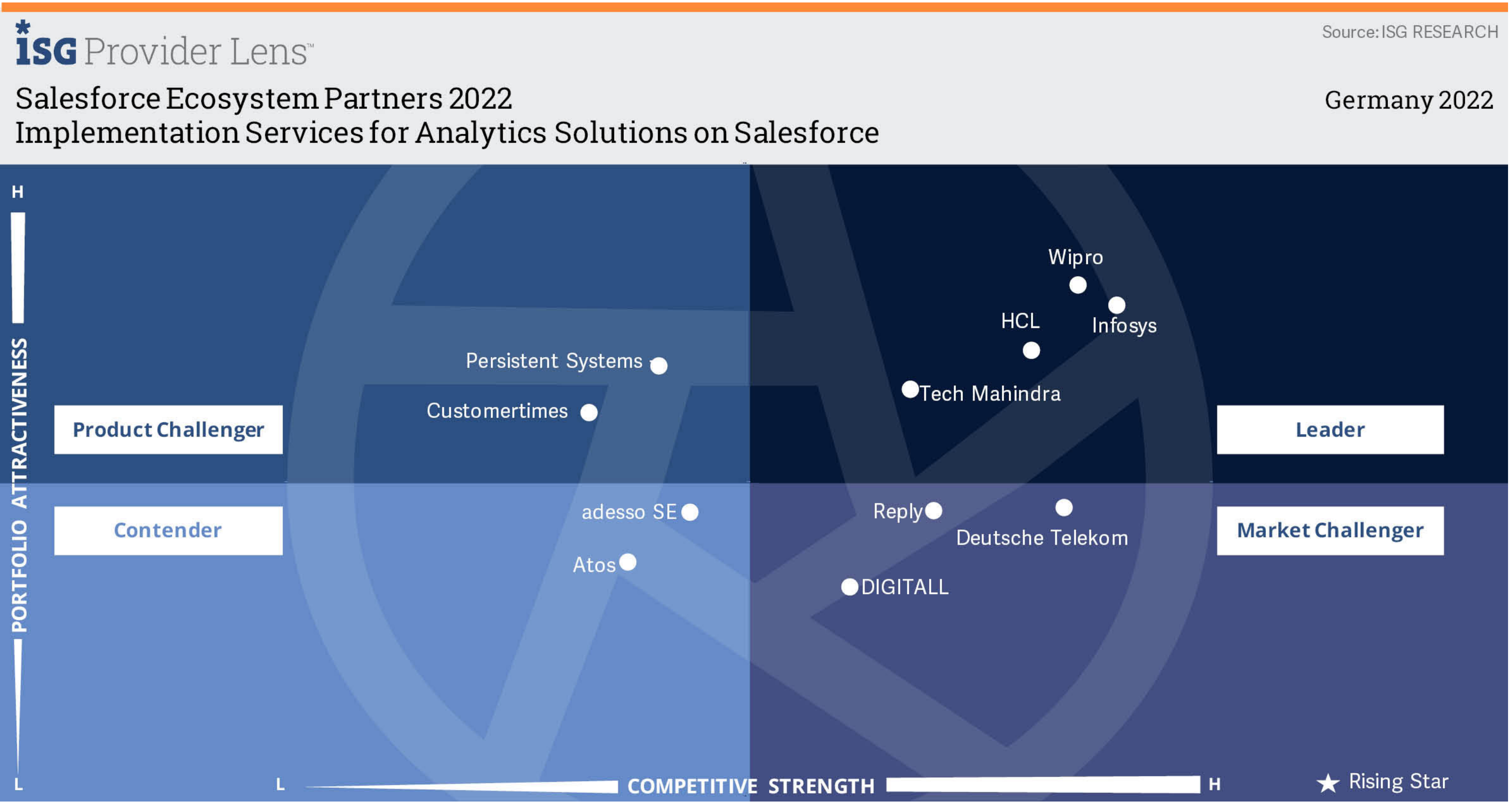
Small and midsize companies often do not have enough data sets to allow AI to come up with accurate models. Service providers are increasingly developing their own reusable products/industry-specific models based on regional and global customer experience and pre-trained using market best practices for specific use cases. An important factor of the market positions of service providers is the mobile-first strategy, the strong volume development of data traffic from local mobile networks advocates the development of applications optimized for mobile devices from the beginning. This is useful for the employees in the field and can help organizations keep in better contact with their customers. All service providers must aim for high levels of user satisfaction to sustain or encourage the use of Salesforce Tableau and Einstein Analytics and justify the investments in Salesforce analytics solutions.

Marketing professionals should read this report to understand the relative positioning and capabilities of service partners that can help them effectively implement Salesforce analytics solutions. The report also highlights the advanced managed service capabilities of service providers, including support for administration, development and use of accelerators, Salesforce Lightning services, proactive monitoring and consulting services.

IT and technology executives should read this report to gain a clear understanding of the relative positioning and capabilities of analytics solution providers for Salesforce. The report also compares providers based on their technical capabilities in areas such as remote and onsite monitoring, technology accelerators, incident response, automation and development methodologies.

Security and data professionals should read this report to understand how vendors are complying with in-country data protection- regulations in their Salesforce analytics solutions practices, such as the General Data Protection Regulation (GDPR) and security requirements.

Procurement professionals should read this report to understand how vendors differ in their approach to Salesforce analytics solutions in Germany. The report also looks at how vendors' experience varies in terms of Salesforce application support, types of customer bases, and industry relationships.



This quadrant addresses providers of **implementation services for analytics solutions** in the context of Salesforce. These solutions may also use **third-party data** such as market research data or geographical data.

Rainer Suletzki

Definition

This quadrant addresses providers of implementation services for CRM analytics solutions in the context of Salesforce. In addition to the data that are available in Salesforce instances, these solutions may also use third-party data such as market research data or geographical data. The respective services include consulting, development of data definitions, configuring the data management and implementing reports and the respective visualizations. Mobile access is often an important part of the requirements.

Eligibility Criteria

1. Strong implementation capabilities (consulting, configuration, report development and go-live) for analytics solutions based on Salesforce data, mostly using the Tableau platform
2. Deep knowledge of the Salesforce data architecture
3. Availability of strong methodology and comprehensive tool support with high degree of automation
4. Availability of strong methodology and comprehensive tool support
5. Compelling list of use cases and references.

Observations

The following providers qualified as Leaders in this quadrant:

HCL

HCL offers a consulting package that competently supports clients in the architecture phases for analytics applications. Ensuring data quality as a prerequisite for high-performance analytics is a priority for HCL.

Infosys

Infosys offers numerous preconfigured solutions and dashboards for the analytics functions in sales, service and B2B marketing. The company has high competence in mobile applications in the analytics context.

Tech Mahindra

Tech Mahindra relies on a consistent data-driven approach to realize functionally efficient analytics solutions and has significant competence in mobile applications.

Wipro's

Wipro's portfolio includes data-driven strategy consulting for the early phases of development and a robust methodology for business intelligence (BI) application migration.

Appendix

The ISG Provider Lens™ 2022 – Salesforce Ecosystem Partners research study analyzes the relevant software vendors/ service providers in the Germany 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 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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

Lead Author

Rainer Suletzki
Senior Advisor

Rainer Suletzki brings more than 30 years of experience in various IT Management functions within a global German Life Science corporation. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution. Currently he acts as independent consultant in various projects at ISG with focus upon application management for SAP, specifically for SAP HANA, and for Salesforce. This includes ISG Provider Lens Studies as well as various projects supporting companies in defining IT strategies and the corresponding sourcing decisions.

Research Analyst

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Research Analyst

Keanu Ghrab is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Salesforce, ServiceNow, SAP, ADM and Future of Work. His area of expertise includes market, company, and competitive analysis. During his tenure, he has developed content from an enterprise perspective and authors the global summary report.

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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ISG

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ISG Provider Lens™

MARCH, 2022

REPORT: SALESFORCE ECOSYSTEM PARTNERS