Salesforce Services Provider Compendium 2020

Enterprise Platform Services (EPS)
Market Report – May 2020: Complimentary Abstract / Table of Contents

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Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

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In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Membership information

- This report is included in the following research program(s)
  – Enterprise Platform Services (EPS)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

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Table of contents

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Background of the research

- Early adopters of Salesforce services were looking to effectively manage customer relationships, market targeted products, explore sales performance, and drive cost efficiency riding on the cloud wave. As the Salesforce technology landscape broadened, enterprises' approach toward Salesforce has evolved from a "reactive" relationship management to a "proactive" approach toward Customer Experience (CX)

- Enterprises leverage CX as a key channel to open up new streams of revenue. They seek to create a 360-degree customer view (understand and map their customer behavior/journey) leveraging advanced analytics to better engage and offer personalized experience to generate new opportunities

- With these changing enterprise expectations and evolving Salesforce tech landscape, service providers are investing in building strong industry-specific solutions to expedite time-to-market for clients and are taking a strong inorganic approach with tuck-in acquisitions to fill gaps across their Salesforce services portfolio and further enhance their geographic footprint

- In this research, we present an assessment of 16 service providers featured on the Salesforce services PEAK Matrix [®], a comprehensive matrix that evaluates and categorizes service providers in terms of their capabilities

The assessment is based on Everest Group's annual Request For Information (RFI) process for calendar year 2019, interactions with leading Salesforce service providers, client reference checks, and an ongoing analysis of the Salesforce services market

Scope of this report

Services
Salesforce services

Geography
Global

Service providers:
16 leading Salesforce service providers

This report assessed the following 16 service providers on the Salesforce services PEAK Matrix:

Leaders: Accenture, Bluewolf, Deloitte, and PwC

Major Contenders: Acumen Solutions, Appirio, Capgemini, Cognizant, DXC Technology, Infosys, NTT DATA, and TCS

Aspirants: LTI, Mphasis, UST Global, and Zensar

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Everest Group's definition of scope of Salesforce services

NOT EXHAUSTIVE

Salesforce services

Platform / experience framework

Salesforce classic: An upgraded version of the platform, acquired from Sendia, that has meaningful application development capabilities

Salesforce lightning: A reimagined platform offering intuitive UI/UX capabilities and next-generation technology capabilities including Einstein Analytics

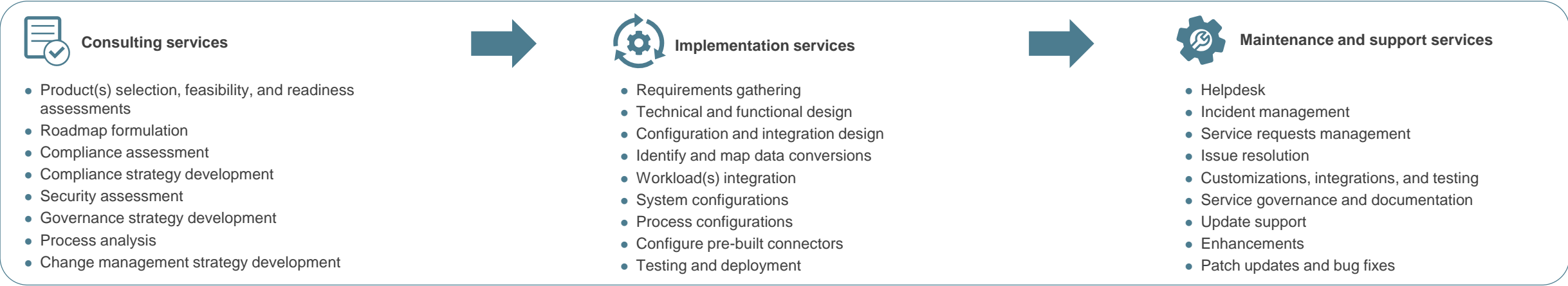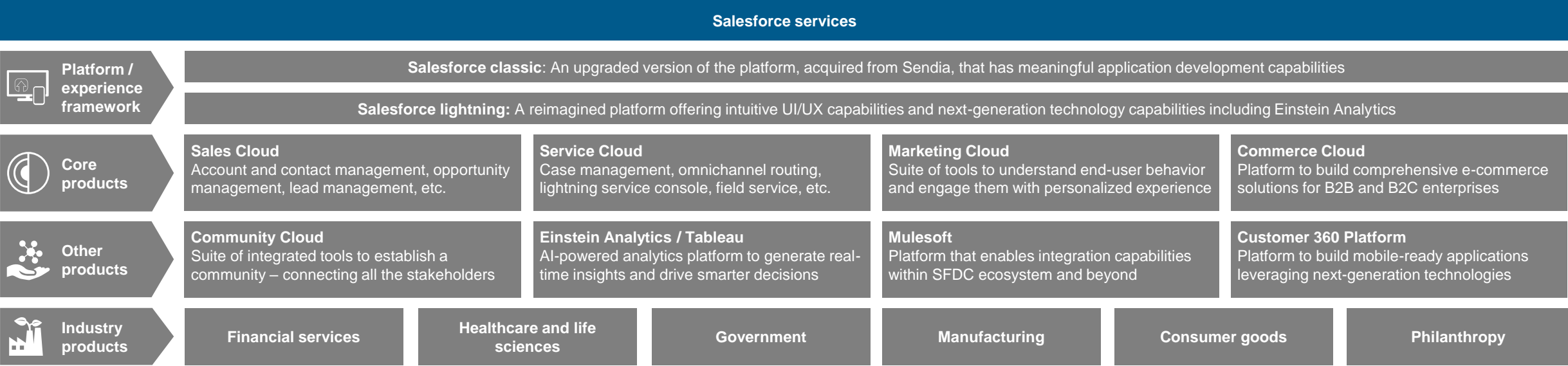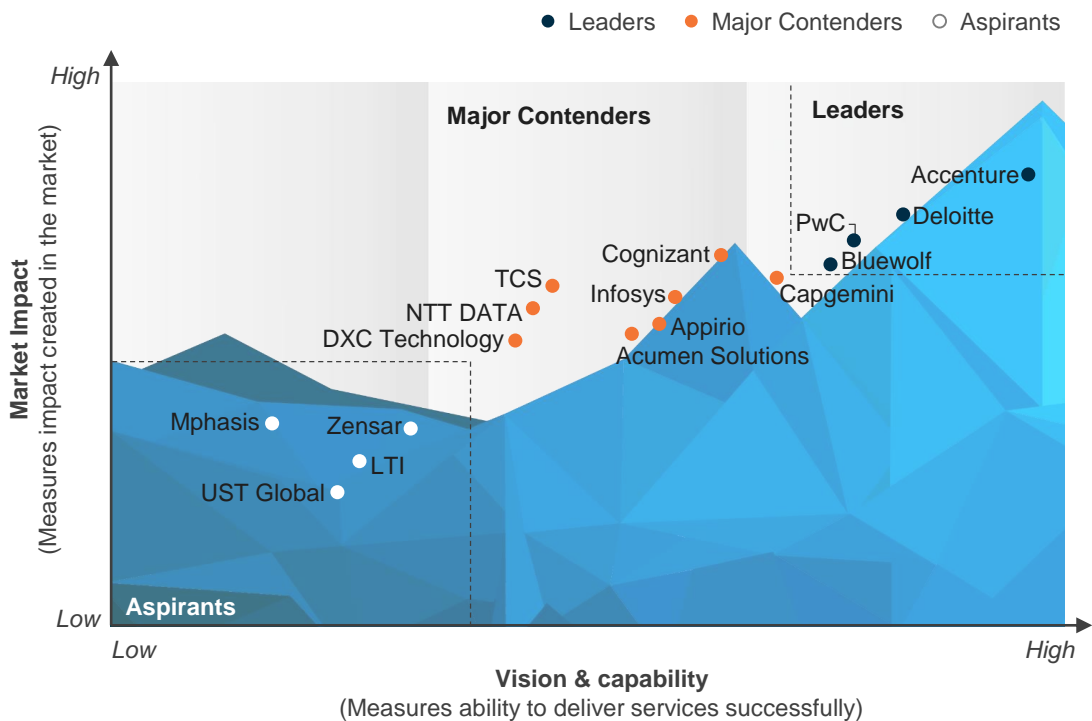**Core products**

Sales Cloud Account and contact management, opportunity management, lead management, etc.	**Service Cloud** Case management, omnichannel routing, lightning service console, field service, etc.	**Marketing Cloud** Suite of tools to understand end-user behavior and engage them with personalized experience	**Commerce Cloud** Platform to build comprehensive e-commerce solutions for B2B and B2C enterprises

Other products

Community Cloud Suite of integrated tools to establish a community – connecting all the stakeholders	**Einstein Analytics / Tableau** AI-powered analytics platform to generate real-time insights and drive smarter decisions	**Mulesoft** Platform that enables integration capabilities within SFDC ecosystem and beyond	**Customer 360 Platform** Platform to build mobile-ready applications leveraging next-generation technologies

Industry products

Financial services	**Healthcare and life sciences**	**Government**	**Manufacturing**	**Consumer goods**	**Philanthropy**

Consulting services
- Product(s) selection, feasibility, and readiness assessments
- Roadmap formulation
- Compliance assessment
- Compliance strategy development
- Security assessment
- Governance strategy development
- Process analysis
- Change management strategy development

Implementation services
- Requirements gathering
- Technical and functional design
- Configuration and integration design
- Identify and map data conversions
- Workload(s) integration
- System configurations
- Process configurations
- Configure pre-built connectors
- Testing and deployment

Maintenance and support services
- Helpdesk
- Incident management
- Service requests management
- Issue resolution
- Customizations, integrations, and testing
- Service governance and documentation
- Update support
- Enhancements
- Patch updates and bug fixes

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This study provides an assessment of the leading providers of Salesforce services

Assessment of Salesforce Service Providers 2020
Illustrative example

● Leaders ● Major Contenders ○ Aspirants

Market Impact (Measures impact created in the market)

High / Low

Major Contenders

Leaders
- Accenture ●
- Deloitte ●
- PwC
- Bluewolf ●
- Capgemini ●

- Cognizant ●
- TCS ●
- Infosys ●
- NTT DATA ●
- DXC Technology ●
- Appirio ●
- Acumen Solutions

- Mphasis ○
- Zensar ○
- LTI ○
- UST Global ○

Aspirants

Low / Low ... High

Vision & capability (Measures ability to deliver services successfully)

Note: Assessment for Acumen Solutions, Bluewolf, Capgemini, Deloitte, and PwC excludes service provider inputs on this particular study, and is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of the service provider, public disclosures, and interaction with buyers

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information will be presented back to the industry only in an aggregated fashion

Source: Everest Group (2020)

Capability assessment
Illustrative example

Measure of capability: ● High ◔ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1									
Service provider 2									
Service provider 3									
Service provider 4									
Service provider 5									
Service provider 6									
Service provider 7									
Service provider 8									
Service provider 9									

Everest Group's remarks on service providers
Illustrative example

Measure of capability: ● High ◔ Low

| Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths
- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement
- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

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The Salesforce services compendium report has profiles and buyer case studies for 16 leading service providers
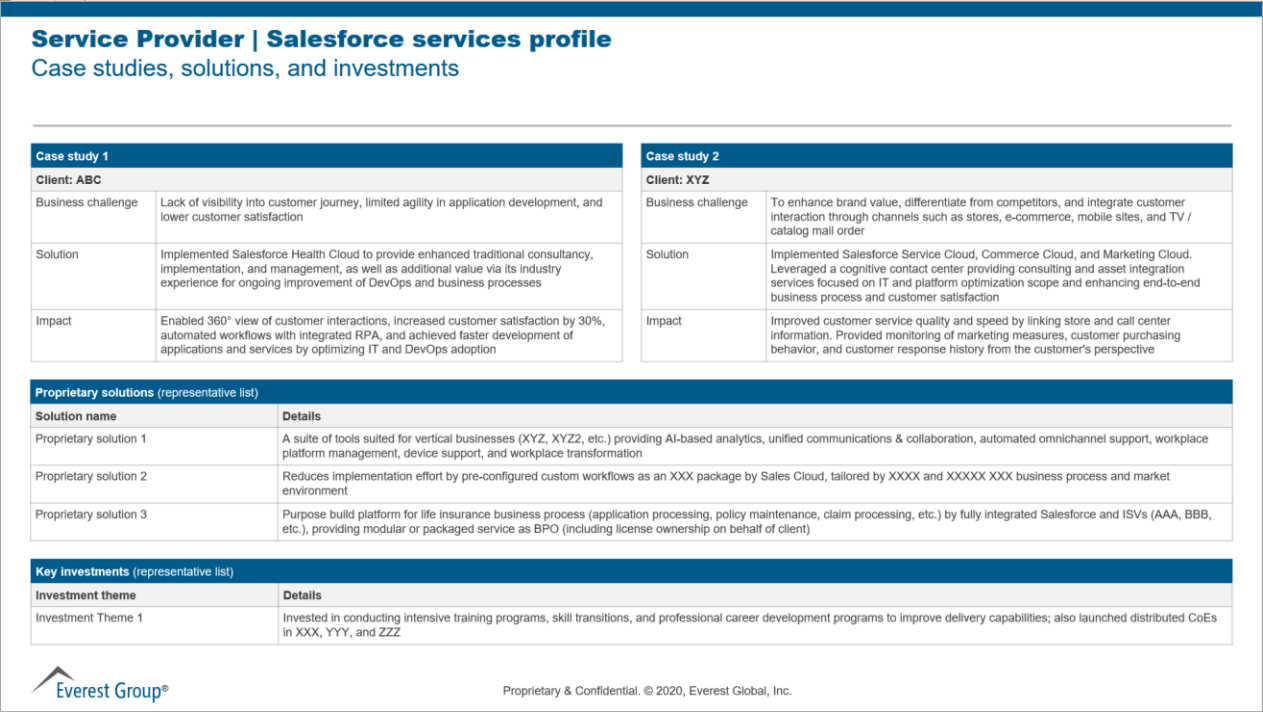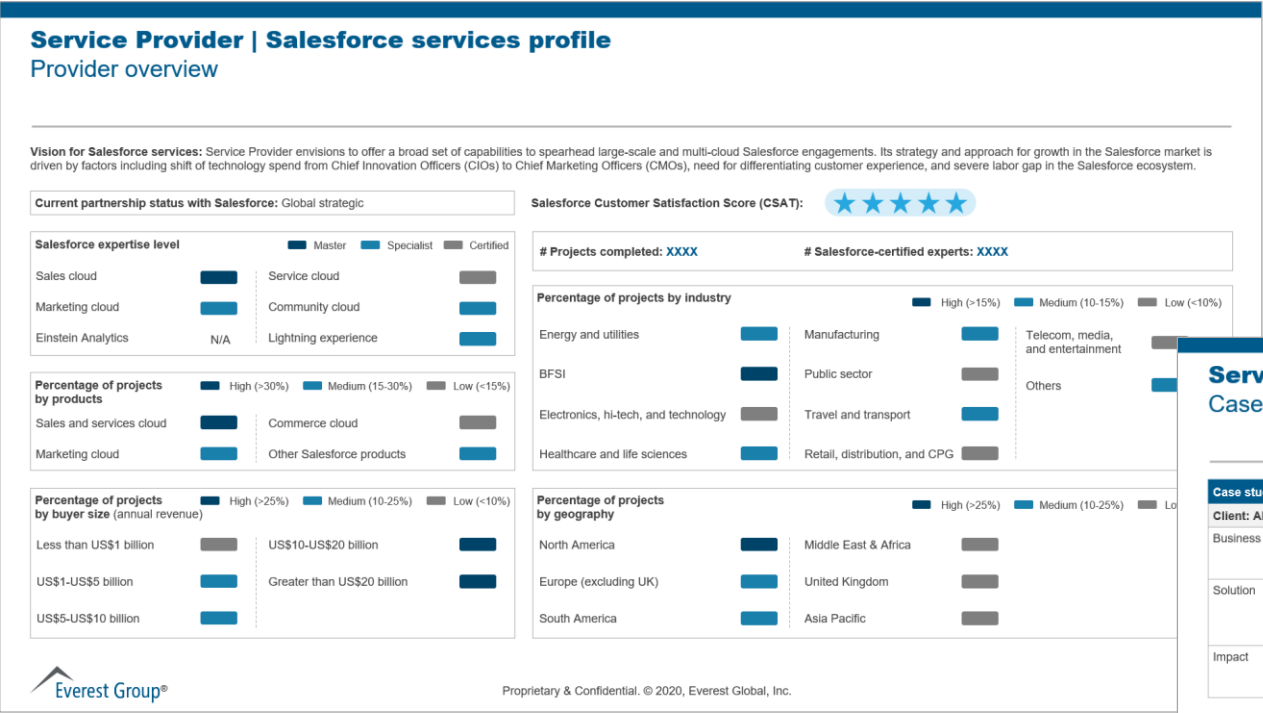
Research calendar – Enterprise Platform Services

| | Published | Planned | Current release |

Flagship EPS reports	Release date
Enterprise Platform IT Services in BFS PEAK Matrix™ Assessment 2019: Modernization at Speed and Scale	June 2019
Workday Human Capital Management (HCM) IT Services – PEAK Matrix™ Assessment and Market Trends 2019	July 2019
Services for Cloud ERP – PEAK Matrix™ Assessment 2020: The Market is Growing but Not Fast Enough	November 2019
Salesforce Services PEAK Matrix® Assessment 2020	May 2020
Salesforce Services Provider Compendium 2020	**May 2020**
Salesforce Services – State of the Market Report 2020	Q2 2020
Salesforce Services PEAK Matrix® Assessment 2020 – Focus on Sales & Service Cloud and Marketing Cloud	Q2 2020
ServiceNow Services PEAK Matrix® Assessment 2020	Q3 2020
ServiceNow Services PEAK Matrix® Assessment 2020 – Service Provider Compendium	Q3 2020
ServiceNow Services – State of the Market Report 2020	Q3 2020
BigTech Battle – Integration Platforms	Q3 2020

Thematic EPS reports	
BigTech Battle: Digital Experience Platforms (DXP) Assessment – Rise of the Digital Experience Platform	June 2019
Rebooting your SaaS Adoption Strategy	Q2 2020
Cloud Cost Management Platforms Trailblazers	Q2 2020
Platform Businesses: Orchestrating Internal and External Ecosystem	Q3 2020
S/4HANA: Learnings from Current Adoption	Q4 2020

Note: For a list of all our published EPS reports, please refer to our website page

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Additional EPS research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest

1. **Services for Cloud ERP – PEAK Matrix® Assessment 2020: The Market is Growing but Not Fast Enough** (EGR-2019-50-R-3424); 2020. Globally, ERP modernization is part of almost half of all digital transformation projects. Increased Total Cost of Ownership (TCO), enterprise agility, and scalability are driving enterprises to switch from traditional on-premise ERP platforms to cloud ERP. However, organizations face multiple challenges in adopting cloud ERP, including legacy ERP burden, cloud unreadiness, and business disruption risk, among others. In this report, we chart the road for enterprises to successfully adopt cloud ERP by following the five key steps of cloud ERP adoption. We also present an assessment and detailed profiles of 12 IT service providers featured on the Services for Cloud ERP PEAK Matrix

2. **Workday HCM IT Services – PEAK Matrix® Assessment and Market Trends 2019: HCM on Cloud the New Paradigm – Workday Leads the Way** (EGR-2019-32-R-3235); 2019. Workday has led market growth with its consistently high user satisfaction scores. It is continuously investing in the development of analytics capabilities and is building a platform for extending and customizing its HCM suite. However, with competitors' growth catching up to Workday's, enterprises must carefully consider an HCM suite's functionality, experience, and overall cost while making their selection. In this research, we present the assessment and detailed profiles of 12 IT service providers featured on the Workday HCM IT Services PEAK Matrix

For more information on this and other research published by Everest Group, please contact us:

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About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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