Salesforce Marketing and Commerce Cloud Services PEAK Matrix® Assessment 2020

Enterprise Platform Services (EPS)

Market Report – July 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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- Accelerators™
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- 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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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)

- Marketing Cloud by Salesforce helps in delivering relevant, personalized journeys to target audience across the right channels and devices. Enterprises can take advantage of integrated solutions such as Customer Journey Management, Email Studio, Mobile Studio, Social Studio, web personalization, advertising, content management and creation, and data analysis

- Likewise, Commerce Cloud by Salesforce helps businesses in transforming commerce experience for target audience with seamless ordering, personalizing with AI, leveraging social extensions, managing multiple sites and regions, empowering customer service teams, thereby enhancing customer satisfaction and improvising conversion funnel

- In this research, we present an assessment of 15 service providers featured on the Salesforce Marketing and Commerce Cloud services PEAK Matrix®

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 Marketing and Commerce Cloud services

Geography
Global

Service providers
15 leading Salesforce service providers

This report assessed the following 15 service providers on the Salesforce Marketing and Commerce Cloud services PEAK Matrix:
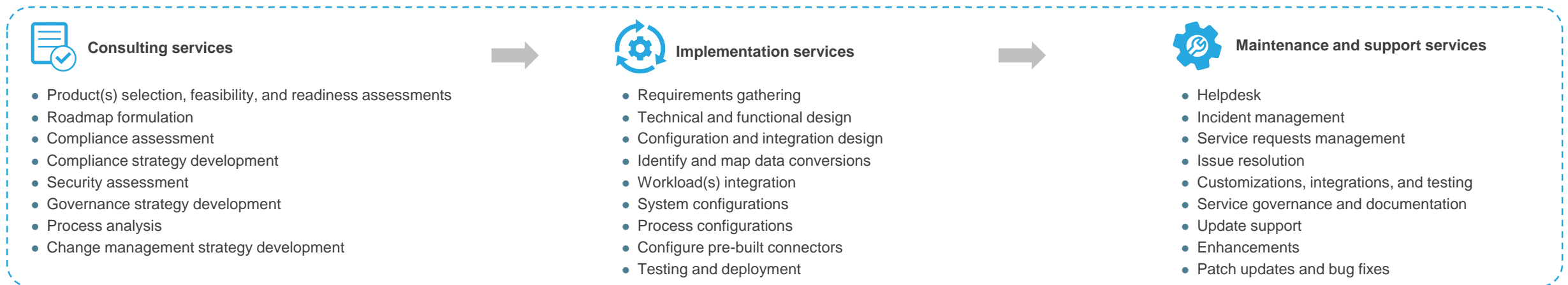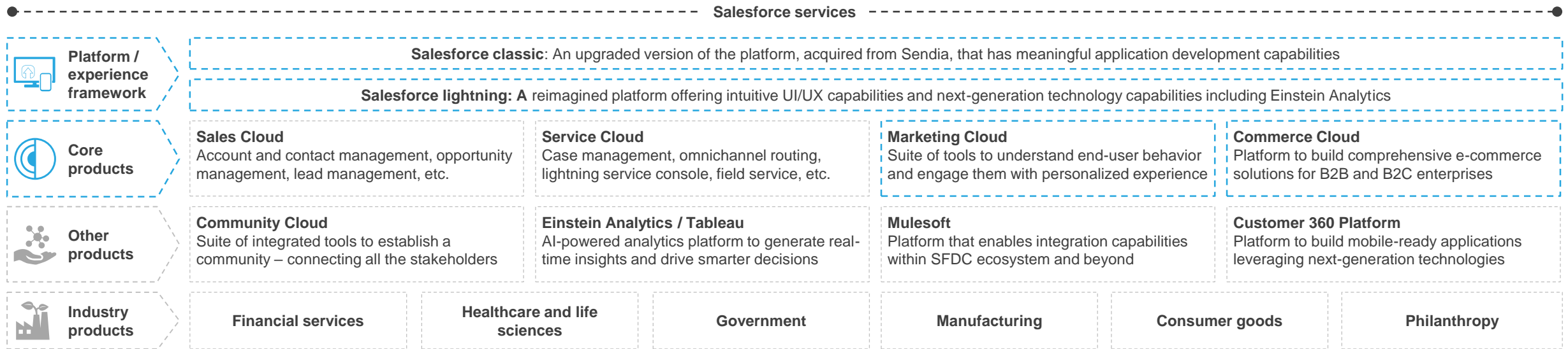
Leaders: Accenture, Capgemini, and Deloitte

Major Contenders: Appirio, Bluewolf, Cognizant, DXC Technology, Infosys, ISOBAR, PwC, TCS, and Traction on Demand

Aspirants: Mphasis, UST Global, and Zensar

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Everest Group's definition of scope of Salesforce Marketing and Commerce Cloud services

NOT EXHAUSTIVE

┄┄ Focus of research

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 → Implementation services → Maintenance and support services

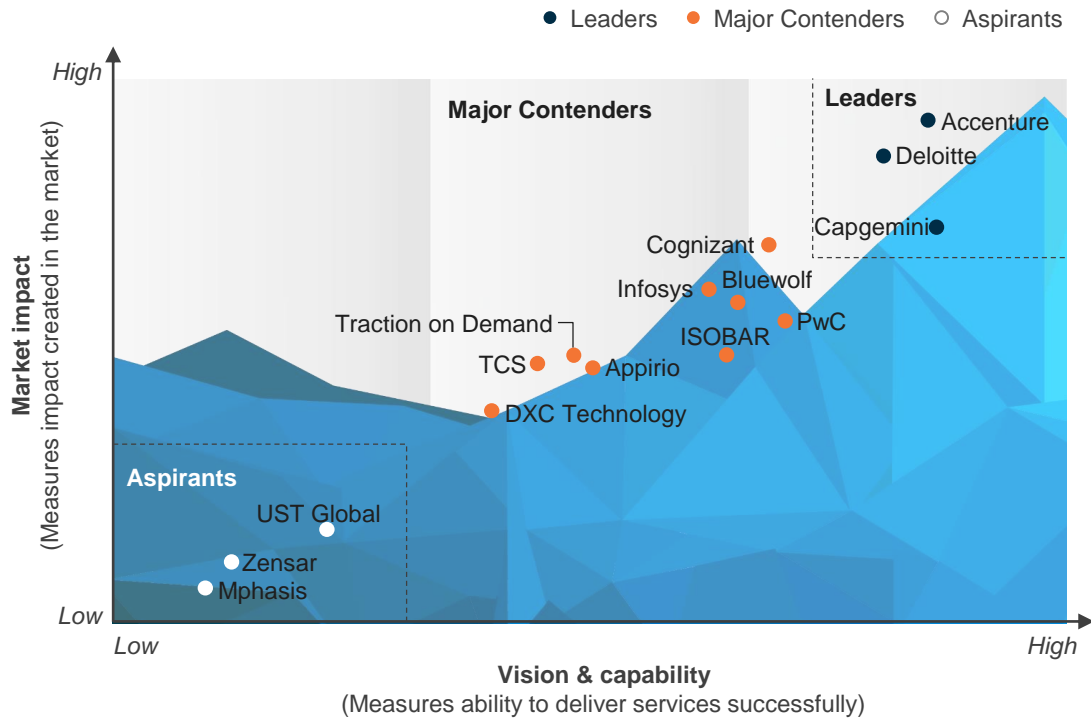| Consulting services	Implementation services	Maintenance and support services
• Product(s) selection, feasibility, and readiness assessments	• Requirements gathering	• Helpdesk
• Roadmap formulation	• Technical and functional design	• Incident management
• Compliance assessment	• Configuration and integration design	• Service requests management
• Compliance strategy development	• Identify and map data conversions	• Issue resolution
• Security assessment	• Workload(s) integration	• Customizations, integrations, and testing
• Governance strategy development	• System configurations	• Service governance and documentation
• Process analysis	• Process configurations	• Update support
• Change management strategy development	• Configure pre-built connectors	• Enhancements
	• Testing and deployment	• Patch updates and bug fixes

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This study provides an assessment of the leading providers of Salesforce Marketing and Commerce cloud services

Assessment of Salesforce Marketing and Commerce Cloud Service Providers 2020

Illustrative example

● Leaders   ● Major Contenders   ○ Aspirants

Market impact
(Measures impact created in the market)

High / Low (vertical axis)

Leaders
- ● Accenture
- ● Deloitte
- ● Capgemini

Major Contenders
- ● Cognizant
- Infosys ● Bluewolf
- Traction on Demand
- TCS ● Appirio ● ISOBAR ● PwC
- DXC Technology

Aspirants
- UST Global ○
- ○ Zensar
- ○ Mphasis

Vision & capability
(Measures ability to deliver services successfully)

Low — High (horizontal axis)

Note 1:   PEAK Matrix specific to Marketing and Commerce Cloud services of overall Salesforce services portfolio
Note 2:   This assessment is derived from an earlier Salesforce PEAK Matrix assessment published on 21 May 2020
Note 3:   Assessments for Appirio, Bluewolf, Capgemini, Deloitte, ISOBAR, PwC, and Traction on Demand exclude service provider inputs on this PEAK Matrix assessment, and are 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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Research calendar – Enterprise Platform Services

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 PEAK Matrix® Assessment 2020 – Service Provider Compendium	May 2020
Salesforce Services – Solving for the Missing Link	June 2020
Salesforce Marketing and Commerce Cloud Services PEAK Matrix® Assessment 2020	**July 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
Pega Services PEAK Matrix® Assessment 2020	Q4 2020

Thematic EPS reports	
BigTech Battle: Digital Experience Platforms (DXP) Assessment – Rise of the Digital Experience Platform	June 2019
Rebooting your SaaS Adoption Strategy	Q3 2020
Cloud Cost Management Platforms Trailblazers	Q3 2020
Platform Businesses: Orchestrating Internal and External Ecosystem	Q4 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. **Salesforce Services PEAK Matrix® Assessment 2020:** (EGR-2020-50-R-3723); 2020. As the Salesforce technology landscape continues to broaden, enterprises' approach to Salesforce has evolved from a reactive relationship management to a proactive approach to Customer Experience (CX). With changing enterprise expectations and an evolving Salesforce tech landscape, services providers are continually evaluating their capabilities and are looking to acquire firms to fill gaps across their Salesforce services portfolio. This report provides detailed assessments of 16 IT service providers featured on Everest Group's PEAK Matrix® for Salesforce services

2. **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®

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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