

Salesforce Industry Cloud Services PEAK Matrix® Assessment 2023

November 2022: Complimentary Abstract / Table of Contents



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- ▶ Rewards and Recognition
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

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Benchmarking

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Market intelligence

Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

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This report is based on the below sources of proprietary information

- Proprietary database of IT services contracts of major IT providers with Salesforce services in the scope of work (updated annually)
- The database tracks the following elements of each contract:
 - Buyer details including size and signing region
 - Contract details including provider, contract type, TCV & ACV, provider FTEs, start & end dates, duration, and delivery locations
 - Scope details including share of individual buyer locations being served in each contract, Line of Business (LoBs) served, and pricing model employed
- Proprietary database of IT providers (updated annually)
- The database tracks the following for each provider:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by different LoBs
 - Revenue split by region
 - Location and size of delivery centers
 - Technology solutions developed
- Provider briefings
 - Vision and strategy
 - Annual performance and future outlook
 - Key strengths and improvement areas
 - Emerging areas of investment
- Buyer reference interviews, ongoing buyer surveys, and interactions
 - Drivers and challenges for adopting workplace services
 - Assessment of provider performance
 - Emerging priorities
 - Lessons learned and best practices

Providers assessed¹



¹ Assessments for Capgemini, Deloitte, IBM, OSF Digital, PwC, Silverline, and Wipro exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

Note: The source of all content is Everest Group unless otherwise specified

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

Introduction

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 approach to a proactive approach toward Customer Experience (CX). Enterprises leverage CX as a key channel that opens new streams of revenue. They seek to create a 360-degree customer view leveraging advanced analytics to better engage and offer a personalized experience to generate new opportunities.

In recent times, enterprise expectations have evolved to generate faster ROI from their Salesforce investments. In this regard, Salesforce has introduced its industry cloud products and augmented industry capabilities through the acquisition of Vlocity. In order to respond to these evolving demand themes, IT service providers are investing in building industry-specific solutions to expedite time-to-market needs for their clients and have also made tuck-in acquisitions to fill gaps across their Salesforce services portfolio and further enhance their geographic footprint.

In this research, we present an assessment and detailed profiles of 16 Salesforce providers featured on the Salesforce Industry Cloud services PEAK Matrix®. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading Salesforce providers, client reference checks, and ongoing analysis of the Enterprise Platform Services market.

This report includes the profiles of the following 16 leading Salesforce service providers featured on the Salesforce Industry Cloud Services PEAK Matrix:

- **Leaders:** Accenture, Deloitte, and IBM
- **Major Contenders:** Capgemini, Cognizant, Globant, Infosys, NTT DATA, OSF Digital, PwC, Silverline, TCS, and Wipro
- **Aspirants:** Birlasoft, Marlabs, and Tech Mahindra

Scope of this report



Geography
Global



Providers
16 leading Salesforce
service providers

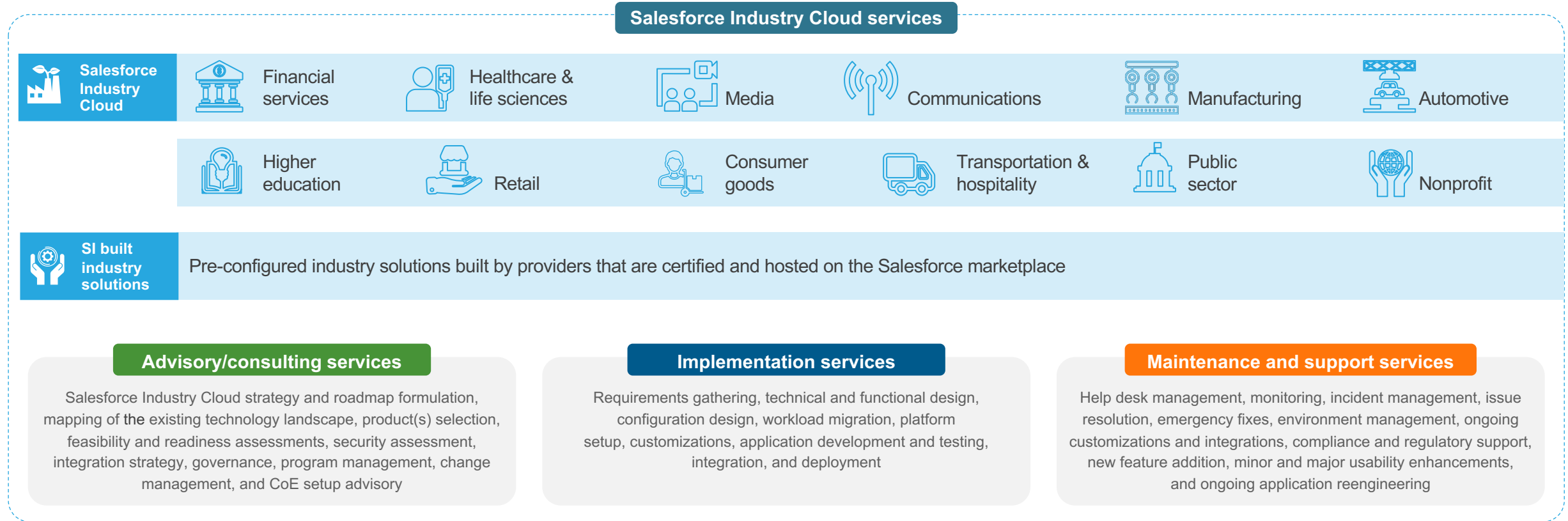


Services
Salesforce Industry
Cloud services

Everest Group’s definition of the scope of Salesforce Industry Cloud services

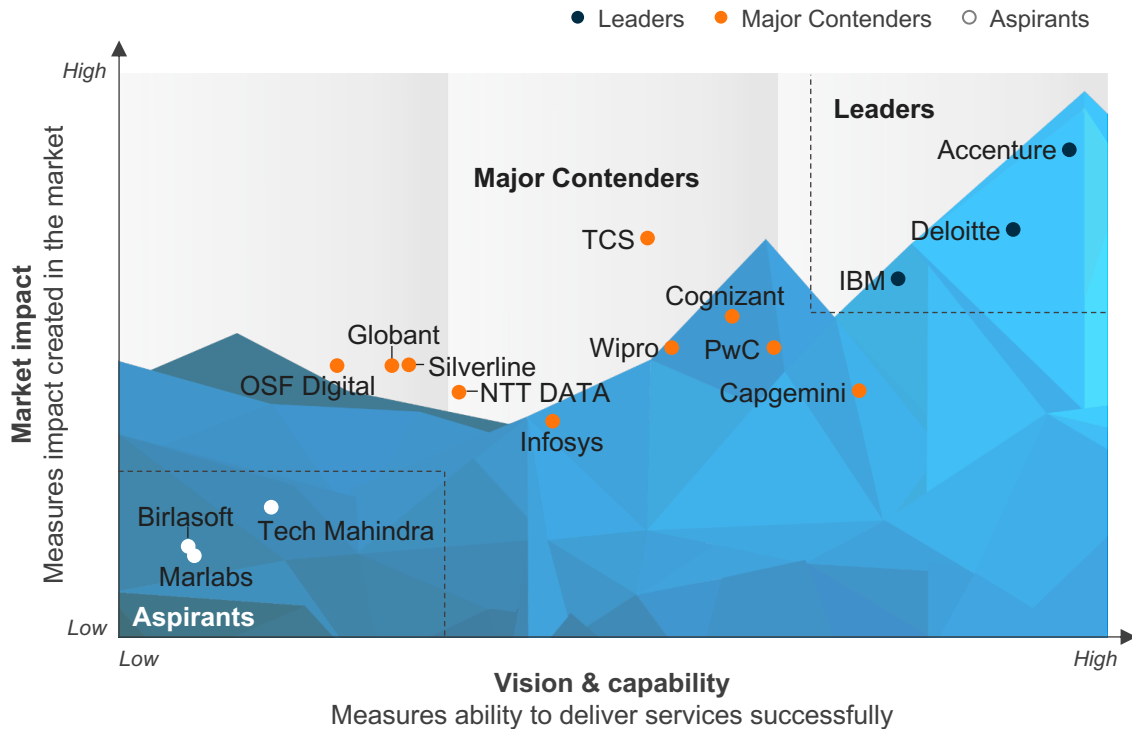
The scope includes IT services delivered for all Salesforce Industry Cloud products and industry solutions built by service providers that are certified and hosted on the Salesforce marketplace

NOT EXHAUSTIVE



This study offers three distinct chapters providing a deep dive into key aspects of Salesforce Industry Cloud services market; below are three charts to illustrate the depth of the report

Everest Group Salesforce Industry Cloud Services PEAK Matrix® Assessment 2022¹



¹ Assessments for Capgemini, Deloitte, IBM, OSF Digital, PwC, Silverline, and Wipro exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: 🔄 Low ● High

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

Everest Group's remarks on providers

Illustrative example

Measure of capability: 🔄 Low ● High

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

- Provider 1 is consistently winning Salesforce Partner Innovation Awards and recognition with the highest industry expertise level indicates its capability and credibility in the market
- Provider 1 has built a strong suite of IP tools/frameworks/solutions focused on financial services, energy & utilities, and public sector to expedite time-to-market

Limitations

- Provider 1 is positioned as a premium-priced partner in Salesforce engagements. It becomes a deterrent for cost-conscious clients
- Provider 1's focus on Salesforce manufacturing and consumer goods cloud is relatively less. It may cause hindrance for clients in these industries to partner with Accenture

Research calendar

Enterprise Platform Services (EPS)

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
SAP S/4HANA Services – Rise with Industry Transformations	November 2021
Microsoft Dynamics 365 – Digitizing Customer Experience	November 2021
Collapsing the Supply Chain: Top 14 Start-ups Redefining Real-time Transportation Visibility	January 2022
Oracle Cloud Application (OCA) Services PEAK Matrix® Assessment 2022 – Global	March 2022
Sustaining Client Satisfaction: Pivot from Implementation to Transformation Partner	March 2022
Oracle Cloud Applications – Systemize Innovation to Drive Business Value	July 2022
ServiceNow Services PEAK Matrix® Assessment 2022	August 2022
ServiceNow Services Provider Compendium 2022	September 2022
The Future of Field Service Management (FSM) – Driving Business Growth by Leveraging Emerging Technologies	October 2022
ServiceNow Services – Delivering the Next Frontier of Digital Transformation	October 2022
Salesforce Industry Cloud Services PEAK Matrix® Assessment 2023	November 2022
Salesforce Industry Cloud Services Provider Compendium 2023	Q4 2022
SAP Business Application Services PEAK Matrix® Assessment 2023 – Global	Q4 2022
SAP Business Application Services Provider Compendium 2023	Q4 2022
SAP Business Application Services PEAK Matrix® Assessment 2023 – Europe	Q4 2022

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