ISG Provider Lens™

Salesforce Ecosystem Partners

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:
cognizant

QUADRANT REPORT | MARCH 2024 | FRANCE

Table of Contents

Report Author: Marcio Tabach

The Salesforce market in France has undergone a period of rationalization to grow stronger

The second edition of ISG Provider Lens™ Salesforce Ecosystem Partners – France reflects a moment of rationalization of Salesforce projects. A large part of Europe faced economic challenges in 2023, with high inflation, increased interest rates and sluggish economic performance. This context has forced customers to reduce costs and reconsider their investments in IT projects. Unlike the pandemic period when most companies accelerated their digital transformation investments, in 2023, companies became more selective and conscious about their operating costs and their capital expenditures. Part of this rationalization was motivated by an excessive sense of urgency due to the immediate pandemic consequences, such as the need to move to cloud and develop online customer relationship tools and comprehensive e-commerce platforms. The end of the pandemic took off some of this sense of urgency.

The second reason for the rationalization was motivated by the news related to mass layoffs in the IT industry at the beginning of the year. Salesforce, like other IT giants such as Amazon and Microsoft, announced cutting 10 percent of its staff. This was motivated by two reasons — fear of an economic recession and rumors of a technology bubble. However, as time passed, the situation seemed similar to a *back to reality* process. Prospects of an economic recovery in 2024 resurged as inflation decreased and interest rates went down. The rationalization focused on extracting value from recent projects, measuring ROI and improving processes and automation. Customers started to revise their large and complex sets of Salesforce licenses and subscriptions. As a consequence, leading providers enhanced their offerings by providing license management, seeking synergies and economies of scale, and specializing in multicloud architectures with some overlapping functionalities. Customers raised their expectations about cost disclosure and results achieved with clear KPIs.

Mastering data and analytics is key to improving **business value** from the **Salesforce platform**.

The word that represented the year was rationalization, characterized by a strategic move to streamline processes, optimize resources and ensure long-term success. By embracing this period of adjustment, businesses can position themselves for greater resiliency and adaptability in the ever-evolving market landscape.

Despite these concerns during the year, the Salesforce market in France is growing at a more moderate rate than in previous years. Most of the providers consulted for this study reported growth. Moreover, the number of mergers and acquisitions were not as impressive as in recent years. Acquiring local companies was crucial for global systems integrators, such as Cognizant and Eviden (an Atos Business), to establish local operations with French-speaking and Salesforce-qualified staff. In addition, local companies also harness their local knowledge and industry contacts. This movement seemed to work as many of these companies managed to achieve leading positions in both editions of this study. Some global systems integrators acquired service providers in France in 2023, but whether they will profit from this strategic move or it has lost momentum is still unclear. Alternatively, local French providers have acquired nearshore companies from countries such as Tunisia, Morocco or those in Eastern Europe. Some of these acquirers are Niji, BayBridgeDigital and Cloudity.

A couple of reasons indicate that the Salesforce Market is still growing. These are Salesforce's announcement in 2022 to invest €3.5 billion in France in the following three years and a large number of recent projects developed by midmarket providers. According to the Salesforce AppExchange website, many of these providers have developed more than 100 recent projects individually. This means that Salesforce is no longer a product exclusive to large and deep-pocketed companies. In August 2023, Salesforce launched Starter Suite, a simple all-in-one CRM app bringing sales, service and marketing capabilities together to help small and growing businesses manage customer relationships, centralize key data and grow more efficiently. This is an important step for Salesforce to expand its customer base to a broader clientele that consequently helps midmarket partners. Midmarket providers also mentioned that projects that in the past focused on core clouds, such as Customer 360, recently became multicloud through integration with complementary clouds, such as Marketing Automation Cloud and Field Service Cloud. This became an important source of recurring business for Salesforce partners. In addition, integrating Salesforce with other systems became crucial, notably with ERP systems such as SAP, Sage and Infor. Integration with mobile channels is also important, as customers need to interact with their consumers through mobile phones other than PCs for emails or websites. Integration became an important part of providers' ability to deliver effective implementations.

On the same occasion it used to announce the aforementioned investments, Salesforce announced the adoption of Hyperforce EU Operating Zone. It aims to enable customers to store and process their data in the European Union by the end of 2022. Part of the €3.5 billion investment plan is dedicated to this objective, a clear response to the increasingly stringent regulations in the European Union and concerns about data sovereignty.

The past year was marked by the spread of GenAI, the launch of Open AI's ChatGPT and its impressive rate of adoption. The resulting potential to increase productivity shook the industry. Salesforce quickly launched its Einstein GPT, incorporating the ChatGPT functionality. Providers in this study unanimously echoed this theme. Some have designed their own functionality, integrating ChatGPT or other large language models (LLMs) to the platform to offer a more cost-effective solution to their clients. Others are still putting their bets on Einstein GPT. Providers are investing in their data science offerings, making partnerships with data clouds and data platforms such as Snowflake, Talend and Informatica. Some companies have even developed data marketing, a solution where Salesforce is used with data from social networks and sponsored links, Google Data Analytics and other tools. The GenAI hype has helped to raise consciousness about the role of data in designing effective Salesforce solutions. Predictive AI has gained importance in providing insights such as customer clusterization, lead conversion probability and hyperpersonalization offerings. AI has equally supported application-managed services where a bug found in one instance of the platform can be automatically fixed across all instances. Some have used GenAI to automate user interfaces with functionalities such as self-help in natural language, freeing the need for in-person help. Mastering data and analytics became crucial to improve business value from the Salesforce platform.

In addition to data and analytics, Salesforce Industry Clouds also became important to large customers, with solutions that comprise functionalities for specific needs. Large enterprise providers have developed their own solutions for segments with particular expertise or focus. Due to increased competition in the Salesforce implementation market, providers can foster differentiation through Industry Cloud solutions and industry understanding. One example is the use of AI to evaluate customer risks for insurance companies.

All of these trends together form an unstoppable movement toward enhancing the consumer and citizen experience. While the year of rationalization may imply a cooling in Salesforce demand, it will crucially lead to a more cohesive and sustainable growth of the Salesforce market in France.

> The word that represented the year was rationalization, characterized as a strategic move to streamline processes, optimize resources and ensure long-term success. By embracing this period of adjustment, businesses can position themselves for greater resilience and adaptability in the ever-evolving market landscape.

Provider Positioning

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Accenture	Product Challenger	Not In	Not In	Leader	Not In	Product Challenger
Akkodis	Not In	Leader	Leader	Not In	Leader	Market Challenger
AlmaviaCX	Not In	Leader	Product Challenger	Not In	Not In	Not In
BayBridgeDigital	Not In	Rising Star ★	Product Challenger	Not In	Product Challenger	Not In
Capgemini	Leader	Not In	Leader	Leader	Not In	Leader
CGI	Leader	Not In	Product Challenger	Product Challenger	Not In	Product Challenger
Cloudity	Not In	Leader	Leader	Not In	Leader	Not In
Cognizant	Leader	Not In	Leader	Leader	Not In	Leader
Comforth Easyfront	Leader	Not In	Leader	Market Challenger	Not In	Product Challenger
Customertimes	Rising Star ★	Not In	Not In	Product Challenger	Product Challenger	Not In

Provider Positioning

Page 2 of 4

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Deloitte	Product Challenger	Not In	Product Challenger	Not In	Not In	Leader
Devoteam	Leader	Not In	Not In	Market Challenger	Not In	Not In
Eviden	Leader	Not In	Rising Star ★	Leader	Not In	Rising Star ★
Guimini	Not In	Product Challenger	Not In	Not In	Not In	Not In
IBM	Product Challenger	Not In	Not In	Not In	Not In	Not In
Inetum	Market Challenger	Not In	Not In	Contender	Not In	Market Challenger
Infosys	Product Challenger	Not In	Product Challenger	Leader	Not In	Not In
Klint	Not In	Contender	Not In	Not In	Product Challenger	Not In
KPC Consulting	Not In	Contender	Not In	Not In	Contender	Not In
KPMG	Contender	Not In	Not In	Not In	Not In	Not In

Provider Positioning

Page 3 of 4

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Levana	Not In	Contender	Contender	Not In	Not In	Not In
LTIMindtree	Leader	Not In	Not In	Leader	Not In	Not In
Manao	Not In	Product Challenger	Not In	Not In	Contender	Not In
Niji	Not In	Leader	Market Challenger	Not In	Leader	Contender
Orange Business	Contender	Not In	Not In	Contender	Not In	Contender
OSF Digital	Not In	Leader	Product Challenger	Not In	Rising Star ★	Product Challenger
Persistent Systems	Not In	Leader	Product Challenger	Not In	Leader	Leader
PwC	Product Challenger	Not In	Not In	Not In	Not In	Leader
Reej Consulting	Not In	Product Challenger	Not In	Not In	Contender	Not In
Reply	Product Challenger	Not In	Leader	Product Challenger	Product Challenger	Not In

Provider Positioning

Page 4 of 4

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds — Midmarket	Implementation Services for Marketing Automation	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Sopra Steria	Contender	Not In	Not In	Market Challenger	Not In	Contender
Talan	Not In	Market Challenger	Leader	Not In	Market Challenger	Not In
TCS	Leader	Not In	Product Challenger	Leader	Not In	Not In
Tech Mahindra	Product Challenger	Not In	Not In	Product Challenger	Not In	Product Challenger
Texeï	Not In	Contender	Not In	Not In	Not In	Not In
Valtech	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Viseo	Not In	Leader	Product Challenger	Not In	Leader	Leader
VO2 Group	Not In	Product Challenger	Contender	Not In	Not In	Not In

Key focus areas for Salesforce Ecosystem Partners 2024.

- **Multicloud Implementation and Integration Services for Large Enterprises**
- **Implementation Services for Core Clouds — Midmarket**
- **Implementation Services for Marketing Automation**
- **Managed Application Services for Large Enterprises**
- **Managed Application Services for Midmarket**
- **Implementation Services for Industry Clouds**

Simplified Illustration; Source: ISG 2024

Definition

The Salesforce Ecosystem study examines various offerings of the Salesforce platform,categorized into implementation services (the change business) and managed application services focusing on operational support for productive applications (the run business). Based on the clients they cater to, these segments have been further categorized into large enterprises and the midmarket. This categorization is particularly significant due to the substantial demand for Salesforce integration into the complex application landscape of large enterprises. Furthermore, large enterprises primarily have globally operating businesses that require corresponding delivery capabilities from service providers. Expanding on the segmentation outlined above, the study includes quadrants examining focused offerings, which are the sweet spot for a large pool of participants within the ecosystem and are sought after by clients.

As a yearly investigation, running for the sixth consecutive year, the study is constantly updated to analyze Salesforce's year-over-year innovations. This sometimes results in adjustments to existing quadrants or the replacement of a quadrant with a new and more relevant topic. For example, the Implementation Services for Industry Clouds quadrant was introduced last year. The study's updates also allow us to adapt our examination of existing quadrants, incorporating innovations that Salesforce introduces to improve its cloud offerings. This year, Salesforce has renewed emphasis on data, generative AI (GenAI) and trust across its entire portfolio that we considered in our analysis.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following six quadrants for services: Multicloud Implementation and Integration Services for Large Enterprises, Implementation Services for Core Clouds — Midmarket, Implementation Services for Marketing Automation, Managed Application for Large Enterprises, Managed Application for Midmarket and Implementation Services for Industry Clouds.

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 (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' 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 position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant 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.

Multicloud Implementation and Integration Services for Large Enterprises

Who Should Read This Section

This report is relevant to large enterprises of all industries in France evaluating Salesforce multicloud implementation and integration service providers.

In this quadrant, ISG defines the current market positioning of these service providers and how they address the critical challenges faced by large enterprises in the country that have adopted various cloud products from the Salesforce portfolio. Over the years, Salesforce has expanded its product strategy beyond CRM applications to related applications, development, integration and reporting. Enterprises are increasingly demanding Salesforce implementation and integration services. Such services enable the adoption of Salesforce cloud solutions and their peripheral tools.

Global enterprises leading France's multicloud implementation and integration market trust Salesforce owing to its robust, secure and intelligent software offerings. To address such requirements, service providers focus more on developing AI-infused software products, leveraging Salesforce AI Cloud and generative AI (GenAI) for enhanced value and anything as a service (XaaS).

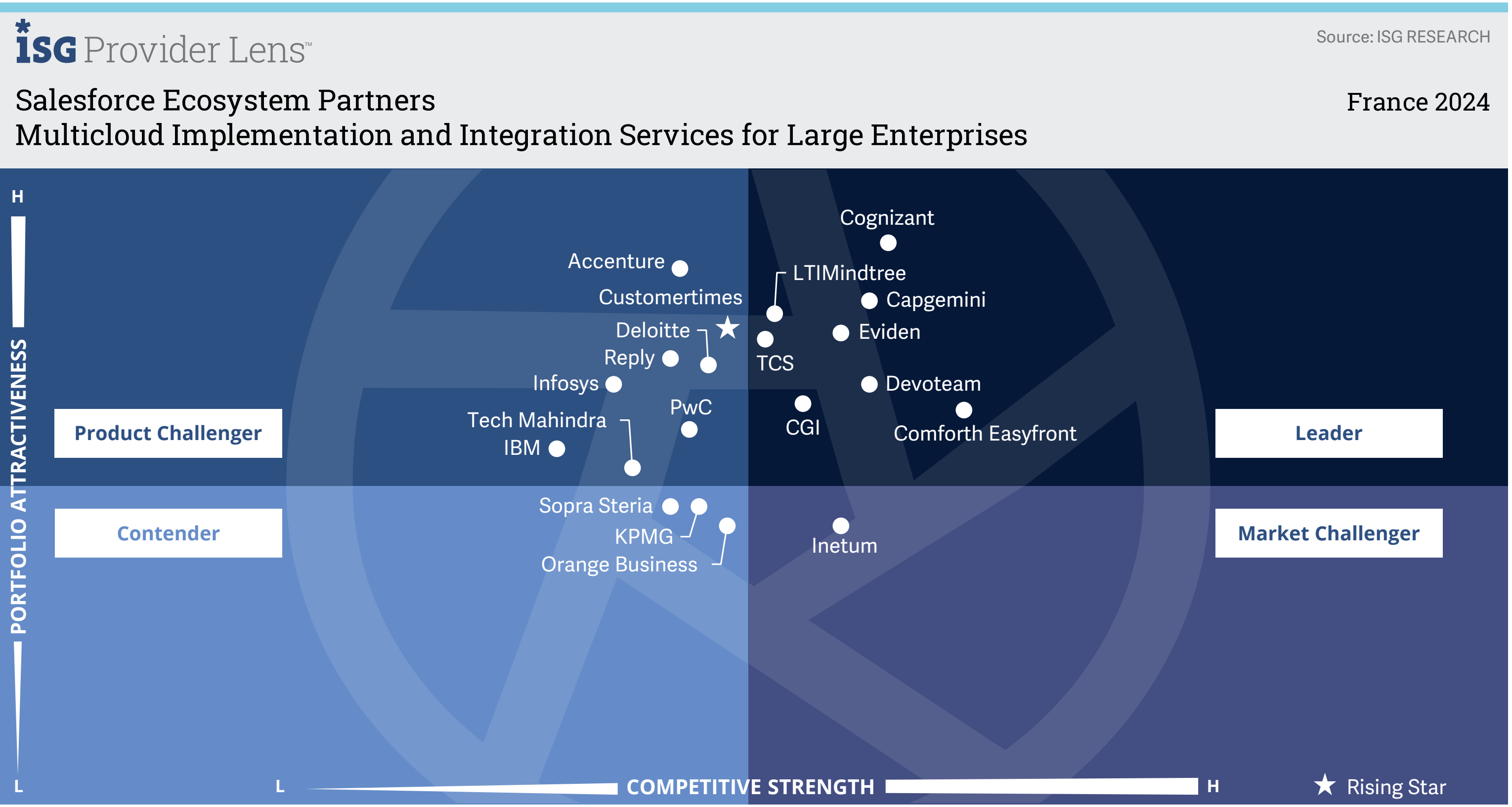
French enterprises prefer service providers with capabilities in functional scoping, business process design and technical audits to develop solution benchmarks and best practice design analysis for Salesforce applications. They also seek global providers with flexible resource locations (onshore, nearshore or hybrid) and dedicated teams based on their specific requirements.

Marketing and sales leaders should read this report to effectively analyze service partners' capabilities in implementing Salesforce Marketing Cloud, Sales Cloud, Heroku and related 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 better understand providers' relative positioning and capabilities in adopting Salesforce cloud services and integration and analysis solutions.

Security and data professionals should read this report to comprehend how providers comply with French security laws for Salesforce integration and compare practices for better understanding.



This quadrant evaluates service providers that implement Salesforce multiclouds, enablecomplex **integrations with other enterprise solutions** and provide complementary servicesfor **large corporations in the French market**.

Marcio Tabach

Definition

This quadrant assesses providers of implementation services tailored for Salesforce applications and their seamless integration with other significant enterprise software solutions. These integrations often form a critical part of the multifaceted systems used by large, global enterprises.

Our extensive study recognizes the integral complexity of these clients' IT environments and the fact that they heavily rely on various Salesforce clouds within the expansive Salesforce portfolio. This intricate landscape requires a comprehensive approach to the implementation of long-term programs. These programs may span multiple rollouts across diverse divisions of client organizations, operating across various regions and markets.

From a functional perspective, these implementation services encompass process consulting to streamline operations, designing to create tailored solutions, configuration to maintain optimal system performance, data clean-up to ensure data quality and accuracy, migration of legacy systems to new platforms and go-live support to ensure a smooth transition.

In conclusion, this quadrant is vital for enabling large, global enterprises to harness the full potential of Salesforce applications, aligning their systems optimally to achieve operational excellence and remain competitive in their respective markets.

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, along 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

Customers in France are opting for license and subscription rationalization as part of a cost optimization strategy. Because some platforms may have overlapping functionalities, large organizations usually buy packages of licenses and may have some redundant costs.

Providers for large enterprises are coupling AI and Salesforce solutions to automate insights and tasks. These uses of AI may be built over Salesforce Einstein or a separate system where integration tools are necessary.

From the 40 companies assessed for this study, 20 qualified for this quadrant, with eight being Leaders and one Rising Star.

Capgemini, with the largest certified Salesforce team in France, leverages GenAI to elevate customer experiences, solidifying its position as a major Salesforce Partner in Europe.

CGI seamlessly blends global expertise with local impact and delivers customized solutions with a focused vertical approach, excelling in the public sector.

Cognizant excels in data management and AI model development and boasts an Einstein Center of Excellence and AI delivery methodology, enhancing customer experiences through generative AI confluence.

Comforth Easyfront

Comforth Easyfront leverages its deep insights into the French culture, market dynamics and regulations to serve its diverse clientele nationwide.

Devoteam

Headquartered in France, **Devoteam** offers the S platform to deliver cutting-edge solutions, enhancing efficiency, collaboration and agility for businesses across industries.

Eviden's (an Atos business) investment in a pre-tuned AI tool accelerates code generation, prioritizing security, scalability and best practices for swift implementation.

LTIMindtree excels as MuleSoft's Premier Certified System Integrator Partner, with expertise in Salesforce, e-commerce clouds and innovative solutions.

TCS enhanced its globally recognized Salesforce capabilities and presence in France by acquiring Alti in 2023.

Customertimes

Customertimes (Rising Star) innovatively leverages GenAI for sales strategy co-piloting, directly based on OpenAI LLMs, bypassing Einstein GPT and optimizing Salesforce licenses.

Cognizant

Leader

"Cognizant has strong competence in integrating data and AI on its Salesforce architectures with an industry-led approach. The company can conduct complex integrations owing to its strong MuleSoft expertise."

Marcio Tabach

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 346,600 employees across 147 offices in 50 countries. In FY22, the company generated $19.4 billion in revenue, with Financial Services as its largest segment. In 2020, Cognizant acquired EI-Technologies, a pure-player Salesforce Partner headquartered in France. It has developed EI-Institut, an organization dedicated to qualifying and certifying professionals with Salesforce skills. The institute has alliances with national universities and qualifies over 2,000 people annually.

Strengths

Noteworthy MuleSoft capabilities: MuleSoft applications play an important role in integrating Salesforce solutions to other environments, such as ERP systems and hyperscalers. Cognizant has received the MuleSoft Partner of the Year award 10 times, and it has more than 1,000 certified professionals. As MuleSoft's Global Premier SI Partner, Cognizant has a strong MuleSoft practice with experienced consultants and expertise in implementing MuleSoft's Platforms, being ahead of its direct competitors to integrate complex architectures.

High competence with Data and AI: Cognizant has a strong expertise with data management and with the development and deployment of AI models. The company has developed a CoE for Einstein solutions and an Einstein AI delivery Methodology. It has also developed Cognizant's Generative AI Confluence to harness the potential of GenAI to enhance the customer's journey and experience.

Industry-led approach: Cognizant divides its remarkable team of over 11,000 certified professionals into industry-focused consultancies. The company develops targeted solutions either with Einstein AI features or with many ISV partners for specific verticals. Cognizant is a Salesforce Expert in six industries: consumer goods, financial services, healthcare, retail, manufacturing and public sector.

Caution

EI-Technologies has played a key role in the Salesforce market in France. Cognizant must clearly communicate the acquisition and its capabilities on its French website, to show to potential customers that it has capabilities that speak the local language and knows the market.

Implementation Services for Core Clouds — Midmarket

Who Should Read This Section

This report is relevant to small and midsize enterprises across all industries in France that are evaluating service providers of Salesforce Sales Cloud, Salesforce Service Cloud and Salesforce Commerce Cloud implementations.

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

In France, enterprises seek a full range of services in a single platform, from strategic advisory, multicloud and cloud implementations to integration and data migration. To meet such requirements, service providers focus on developing tools supporting digital enablement and rapid transition.

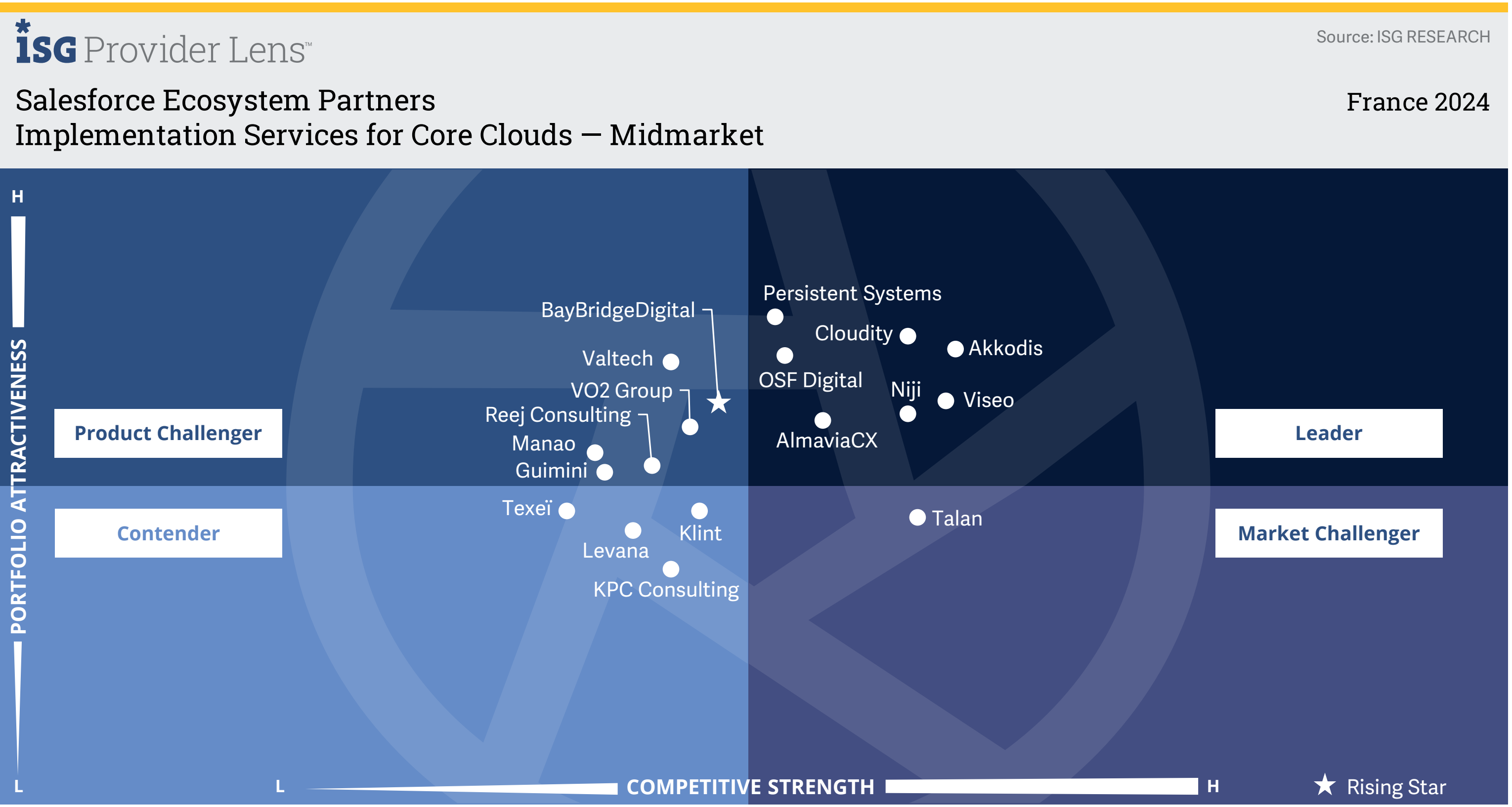
Considering the growth of the Salesforce core cloud business in France, service providers advise enterprises to undertake functional scoping, business process design and technical audits to develop solution benchmarks and best practice design analysis for Salesforce applications.

Security and data professionals should read this report to comprehend how providers comply with French security laws for Salesforce integration and compare practices for better understanding.

IT and technology leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce cloud services and integration and analysis solutions.

Marketing and sales leaders should read this report to understand service providers' relative positions and capabilities in implementing Salesforce Sales and Commerce Cloud, emphasizing industry-specific solutions.

Field service managers should read this report to understand how service providers implement and enhance Salesforce Service Cloud for improved field service operations.



This quadrant evaluates service providers that **implement core Salesforce clouds for midmarket companies in France**. It provides an assessment of their key strengths, differentiators and capabilities.

Marcio Tabach

Definition

This quadrant assesses providers specializing in Salesforce's core offerings — Sales Cloud, Service Cloud, Commerce Cloud and Community Cloud. These products are often considered to form the foundation of Salesforce's cloud-based services. Providers in this category adopt an agile implementation approach, typically catering to clients with midsize or smaller operations. They excel in cases that require minimal integration, resulting in projects within this quadrant often concluding in just a few months.

Key aspects of the services offered by providers in this quadrant revolve around process redesign using Salesforce applications. Implementation services cover process consulting to optimize workflows, designing to tailor Salesforce solutions, configuration to maintain seamless system performance, data clean-up to enhance data quality, data migration to transition smoothly and go-live support to ensure a successful launch.

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go live**) for Salesforce Core Clouds (for example, Sales Cloud, Service Cloud 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. Presence of **unique differentiators**
5. Economic stability and significant **delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**

Observations

Midmarket companies are evolving their CRM strategies to a multicloud approach to integrate different clouds, such as customer 360, marketing automation and service cloud.

French midsize companies deploy projects over some European countries, and that type of implementation often requires providers with multicountry and multilanguage capabilities.

From the 40 companies assessed for this study, 19 qualified for this quadrant, with seven being Leaders and one Rising Star.

AKKODIS

Akkodis swiftly scales teams with the Akkodis talent tool, utilizing Agile methodologies to deliver best-in-class services.

Almavia CX

Almavia CX extends beyond Salesforce, partnering with Zendesk, Pega and other tech firms to craft tailored architectures for clients.

Cloudity

Cloudity ensures successful Salesforce adoption through change management and training, distinguishing itself with robust European growth and high client satisfaction.

Niji

Niji specializes in comprehensive digital transformation consulting and Qualiopi-certified training, ensuring quality and skill development for clients.

OSF Digital

OSF Digital pioneers e-commerce and omnichannel sales with rapid deployment solutions, leveraging proprietary GenAI for efficiency.

Persistent

Persistent Systems excels in Data Cloud with over 1,000 implementations globally, using the Customer 360 Data Model and being recognized for exceptional customer service.

Viseo

Viseo emphasizes Salesforce, selling its Microsoft Dynamics division and showcasing a strong presence in the French market with extensive project experience.

BayBridgeDigital

BayBridgeDigital (Rising Star) rapidly ascended to Salesforce Summit Partner, excelling in e-commerce software and data optimization partnerships.

Implementation Services for Marketing Automation

Who Should Read This Section

This report is relevant to enterprises across all industries in France evaluating implementation service providers for Salesforce marketing automation.

In this quadrant, ISG defines the current market positioning of Salesforce marketing automation implementation service providers in France and discusses how they address enterprises' key regional challenges. These providers focus on delivering direct, personalized customer engagement and increasing revenue through tailored communication at scale and across multiple channels. Salesforce marketing automation is often the initial step in the Salesforce adoption journey, and companies seeking these implementation services typically do not have complex real-time integration needs.

In France, enterprises seek to integrate all Salesforce data and interactions into one platform for better visibility and access. Therefore, service providers are offering a GenAI-based consolidated platform to solve customers' unique needs.

Many enterprises under the scope of the Implementation Services for Marketing Automation quadrant look for specialized service providers with expertise in delivering end-to-end solutions across the marketing cloud stack, including marketing cloud account management and cloud intelligence.

There is a high demand for service providers with extensive experience in Salesforce marketing automation that can collaborate closely with enterprises' marketing teams to understand clients' business objectives. They can then adopt relevant marketing automation strategies using advanced Marketing Cloud Account Engagement and Marketing Cloud Engagement capabilities for seamless deployment.

Security and data professionals should read this report to comprehend how providers comply with French security laws for Salesforce integration and compare practices for better understanding.

IT and technology leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce cloud services and integration and analysis solutions.

Field service managers should read this report to understand relative position in adopting Salesforce Marketing Cloud, comparing technical capabilities, automation depth, and development methodologies.

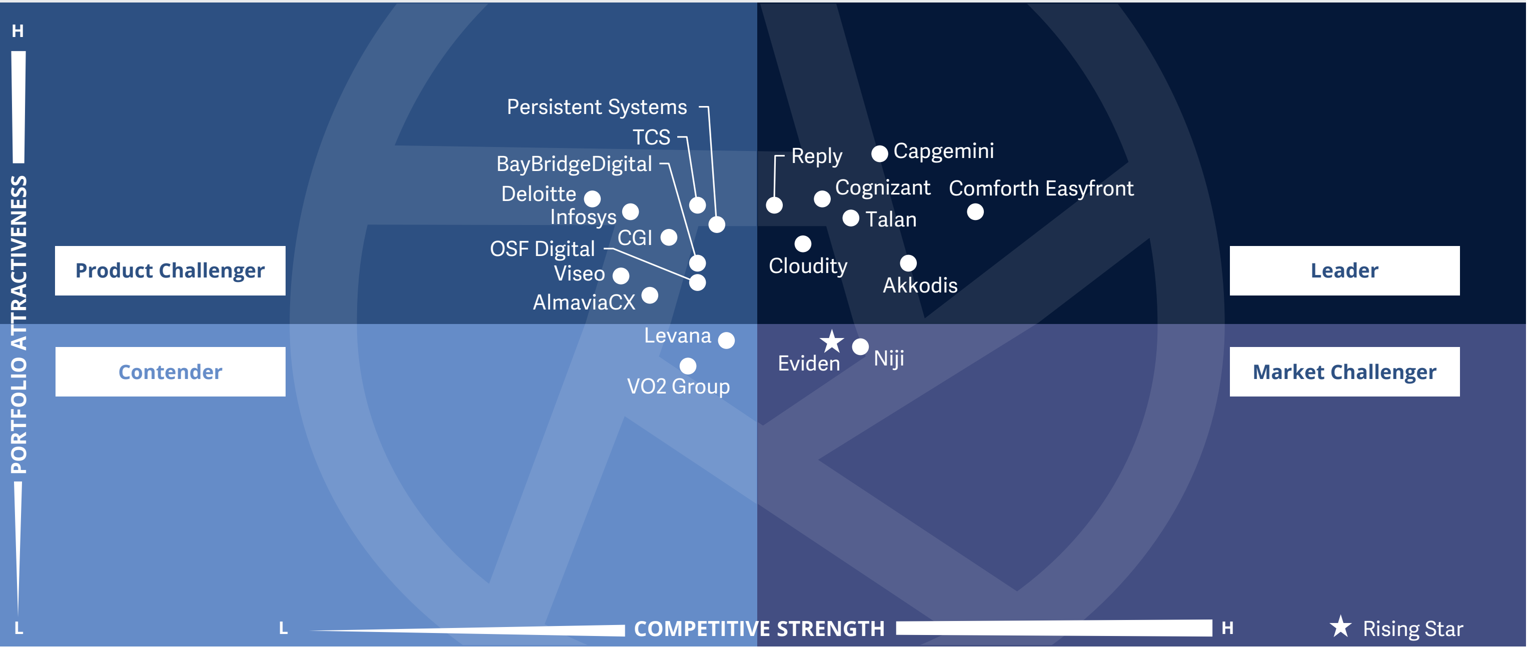
Marketing and sales leaders should read this report to understand the implementation of Salesforce Marketing Cloud, marketing expertise, digital experience and accelerators.

ISG Provider Lens™

Source: ISG RESEARCH

Salesforce Ecosystem Partners Implementation Services for Marketing Automation

France 2024



This quadrant evaluates service providers that **implement Salesforce marketing automation clouds and provide additional marketing services for companies in the French market**. It provides an assessment of their strengths, differentiators and capabilities.

Marcio Tabach

Definition

This quadrant examines providers specializing in Salesforce Marketing Cloud, catering to a wide spectrum of implementation scenarios. These range from minimal real-time integration into a complex system landscape to more challenging projects with a foundation of Salesforce Marketing Cloud for sophisticated e-commerce and omnichannel marketing endeavors. These scenarios require deep integration into a client's enterprise IT landscape.

Expertise in marketing-specific aspects such as media utilization and multichannel strategies is paramount in this quadrant. Given that integration with end clients often involves a high volume of transactions, the automation of processes emerges as a critical success factor.

The implementation services offered cover process consulting to optimize marketing strategies, designing to tailor Salesforce solutions, configuration to ensure seamless performance, data clean-up to enhance data quality and data migration to enable smooth transitions. These services also cover go-live support to ensure a successful launch.

Providers in this quadrant play a pivotal role in helping businesses harness the potential of Salesforce Marketing Cloud for simple implementations as well as complex, data-intensive omnichannel marketing initiatives. They ensure that a client's marketing capability is efficient and fine-tuned to deliver the best possible results in a competitive business landscape.

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go live**) for the Salesforce Marketing Cloud, Pardot and for marketing-specific aspects, such as information gathering, CX, 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. Presence of **unique differentiators**
5. Economic **stability and significant delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**

Observations

Providers offer full marketing services that go beyond Salesforce implementation, with services, such as search engine optimization (SEO) and e-mail marketing content.

Some providers enhance their marketing automation services with data marketing by cross-referencing data from different sources and using AI models.

From the 40 companies assessed for this study, 20 qualified for this quadrant, with seven being Leaders and one Rising Star.

AKKODIS

Akkodis excels in B2B marketing clouds, prioritizing privacy compliance. Itt offers adoption services and boasts a strong marketing strategy, including high-profile sponsorships.

Capgemini

Capgemini offers comprehensive digital marketing services, including AI-driven content creation, global deployment capabilities and industry-leading research, enhancing customer experiences globally.

Cloudity

Cloudity excels in multicloud projects, integrating Salesforce Marketing Cloud with Einstein Insights and Salesforce Maps for geospatial analysis.

cognizant

Cognizant excels in global implementations, complex integrations and optimizing marketing strategies.

Comforth Easyfront

Comforth Easyfront has expertise in Salesforce Marketing Cloud, Pardot, Datorama, Audience Studio and customized CRM implementations.

REPLY

Reply enhanced its globally recognized Salesforce marketing automation capabilities and presence in France by acquiring Wemanity in 2022.

Talan

Talan strengthens its marketing automation services through acquisitions and a robust data and analytics practice, benefitting French clients.

EVIDEN

Eviden (Rising Star) has experienced significant growth in France and globally, with Eviden's Salesforce Practice growing by 20 percent, doubling deal sizes and signing multiyear contracts.

Leader

"Cognizant achieves the highest level of qualification with Salesforce marketing clouds. It can deploy high-scale and complex architectures and has a differentiated marketing cloud offering."

Marcio Tabach

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 346,600 employees across 147 offices in 50 countries. In FY22, the company generated $19.4 billion in revenue, with Financial Services as its largest segment. In 2020, Cognizant acquired EI-Technologies, a pure-player Salesforce Partner headquartered in France. It has developed EI-Institut, an organization dedicated to qualifying and certifying professionals with Salesforce skills. The institute has alliances with national universities and qualifies 2,000 people annually.

Strengths

Large-scale and complex implementations: Cognizant has shown Marketing Cloud implementation use cases at a global scale involving over 35 countries. These references also involved complex integrations with other Salesforce clouds, AppExchange ISVs such as Veeva and several other integrations.

Marketing strategy optimization offering: Cognizant's offering differentiates by helping customers prioritize and deliver efficiencies and value across clients' business and technology ecosystems. Some of these services are campaign consulting with ideation and content analysis, auditing customers and segments for personalization and cross-channel campaign performance and deliverability assessments.

Highest level of qualification: In 2023 Cognizant became one of the only partners globally to receive the prestigious Salesforce Marketing Cloud Full Stack designation. It is an Expert partner with Level III specialization. Acquiring Lev, a distinguished marketing, technology, strategy and consulting firm, has enhanced Cognizant's expertise. Similarly, acquiring EI-Technologies, a France-based company distinctive for its cloud marketing services, has helped strengthen its customer training.

Caution

Despite Cognizant's remarkable competencies and capabilities with Salesforce marketing clouds, it might not be the most economical or best fit for midmarket companies with no need for complex integrations or multicountry implementations.

Managed Application Services for Large Enterprises

Who Should Read This Section

This report is relevant to large enterprises across all industries in France that are evaluating the service providers of Salesforce managed applications.

In this quadrant, ISG defines the current market positions of providers of Salesforce managed application services for large enterprises in France. This study also covers providers offering additional services, including administrative assistance, development and utilization accelerators, 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 Salesforce platforms, enterprise clients look for service providers that can optimize IT costs and maintain platforms efficiently. In addition, they seek providers that can manage applications, licenses and upgrades, offer user support, and develop business applications integrated with the platforms.

France-based large enterprises with global operations prefer partners that can support deployments in the country and other regions. They seek end-to-end managed application services across all stages of the Salesforce lifecycle. They also prefer global providers owing to their strengths in handling increased complexities, global capabilities, a large number of certified FTEs and extensive experience gained from multiple global projects.

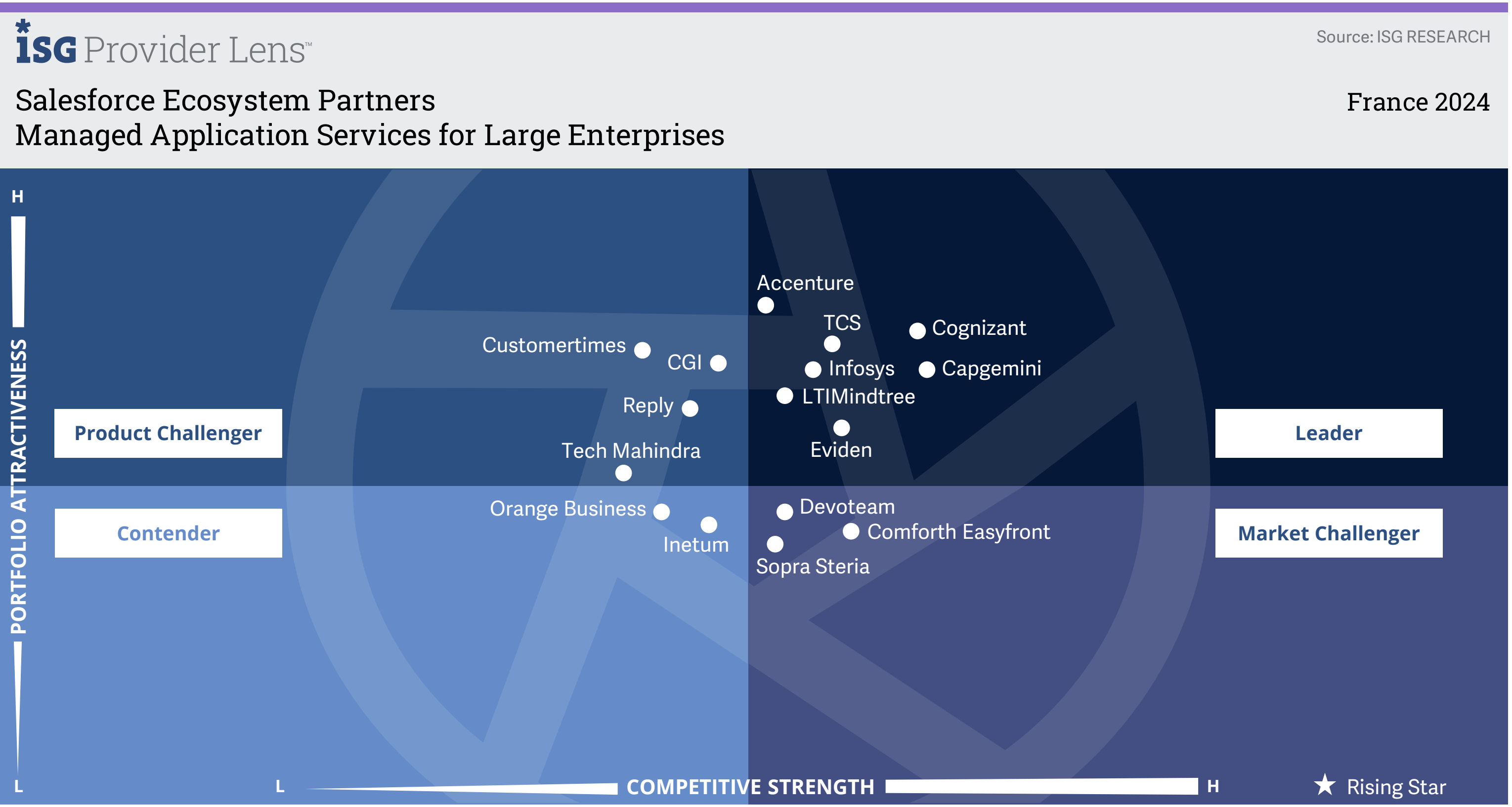
To better address dynamic business needs, service providers offer upgraded managed services that transform application and data portfolios into a more flexible and modern environment.

Marketing and sales leaders should read this report to effectively analyze service partners' capabilities in administration assistance, accelerators, services, proactive monitoring and advisory services.

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 gain insights into service providers' capabilities in offering managed services, comparing their technical prowess in remote and onsite monitoring and other aspects.

Security and data professionals should read this report to understand how providers comply with French security laws for Salesforce integration and compare practices for better understanding.



This quadrant evaluates service providers that offer **managed application services for large enterprises** using the Salesforce cloud. These services include **maintenance, support, security, compliance and continuous improvement**.

Marcio Tabach

Definition

This quadrant assesses providers that offer managed application services form maintenance and support functions. These include continuous monitoring, remote support, centralized management of Salesforce applications, meticulous data quality management, and data security and compliance-related aspects.

For large enterprise clients, these managed services expand in scope to address global reach and the inherent complexity of application landscapes. Such landscapes often involve a variety of solutions from various software providers, making centralized management and support a challenging but essential undertaking.

A key focus in this quadrant is the persistent pursuit of improvements and innovation in the solutions offered. The aim is to enhance the business value generated for enterprises consistently. These managed application services are defined by the transfer of key responsibilities to the service provider and are provided within the confines of rigorously defined SLAs.

Providers in this quadrant serve as the backbone of large enterprises' Salesforceoperations, ensuring not only meticulous maintenance of essential functions but also increased business value. Simultaneously, they are responsible for safeguarding dataintegrity, security and regulatory compliance within enterprise operations' complex, global landscape.

Eligibility Criteria

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

Global customers are unifying their managed services in different countries to achieve greater efficiency by identifying common issues in Salesforce platforms in different regions and reducing costs with large contracts.

GenAI use is gaining importance for managed services. It can be used to find inconsistencies in application code or promote self-help assistance for users.

From the 40 companies assessed for this study, 16 qualified for this quadrant, with seven being Leaders and no Rising Stars.

Accenture's Salesforce managed services accelerate end-to-end Salesforce adoption, maximize transformation securely, migrate infrastructure and deliver AI-powered customer service.

Capgemini excels in preconfigured managed services, optimizing Salesforce platforms with extensive transition management and certified professionals in France.

Cognizant has strengthened its market position in France by innovating with the Neuro IT Operations platform and Skygrade for AI-driven automation and cloud-native transformations.

Eviden enhanced its advanced managed services with proactive consulting, flexible models and recognized security solutions.

Infosys is focused on Panaya ForeSight for impact analysis in Salesforce changes and its proprietary Live Enterprise Application Management Platform for application lifecycles.

LTIMindtree collaborates with Salesforce to develop solutions such as Construction 360, Omni Commerce and Salesforce Automotive Cloud, showcasing expertise across Salesforce clouds.

TCS excels in comprehensive managed application services, including for Salesforce, with competence in various integration platforms and hyperscaler offerings.

Leader

"Cognizant has a world-class, verticalized and end-to-end managed services offering. The company also uses AI-driven forefront technologies to streamline and automate Salesforce managed services."

Marcio Tabach

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 346,600 employees across 147 offices in 50 countries. In FY22, the company generated $19.4 billion in revenue, with Financial Services as its largest segment. In 2020, Cognizant acquired EI-Technologies, a pure-player Salesforce Partner headquartered in France. It has developed EI-Institut, an organization dedicated to qualifying and certifying professionals with Salesforce skills. The institute has alliances with national universities and qualifies 2,000 people annually.

Strengths

End-to-end application managed services: Cognizant's offering covers all stages of the application lifecycle, including application development, application management of the client's existing application estate and application modernization. The company helps customers run their applications and data portfolios in a more flexible environment to support rapid changes. Cognizant is a Level II specialist in Salesforce managed services.

AI-driven automation: Cognizant has developed some state-of-the-art platforms for application management, such as the Cognizant Neuro® IT Operations platform. It brings AI-driven automation to the entire IT operations lifecycle. Another example is Skygrade™, an enterprise application modernization service that offers GenAI, modern tooling and deep hyperscaler specialization to accelerate cloud-native transformations.

Verticalized managed services: Cognizant leverages its deep industry knowledge to improve its managed services. The company can anticipate platform incidents by identifying standards in each particular industry solution. It also has industry-specific solutions for managed services, such as EAZAuto Smart Ticket Management and MedVantage.

Caution

Although EI-Technologies, a company Cognizant acquired in France, does not currently feature Cognizant's accelerators and solutions on its website, the subsidiary could greatly benefit from showcasing some of Cognizant's world-class solutions to enhance its offerings and provide added value to its clientele.

Managed Application Services for Midmarket

Who Should Read This Section

This report is relevant to small and midsize enterprises across all industries in France evaluating the providers of Salesforce managed application services.

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

In France, enterprises seek comprehensive solutions to optimize the Salesforce environment for sustained success. Service providers offer Salesforce managed services, including proactive monitoring, efficient incident resolution, customization, data management, user training, security measures and continuous improvement roadmap, specifically for midmarket clients.

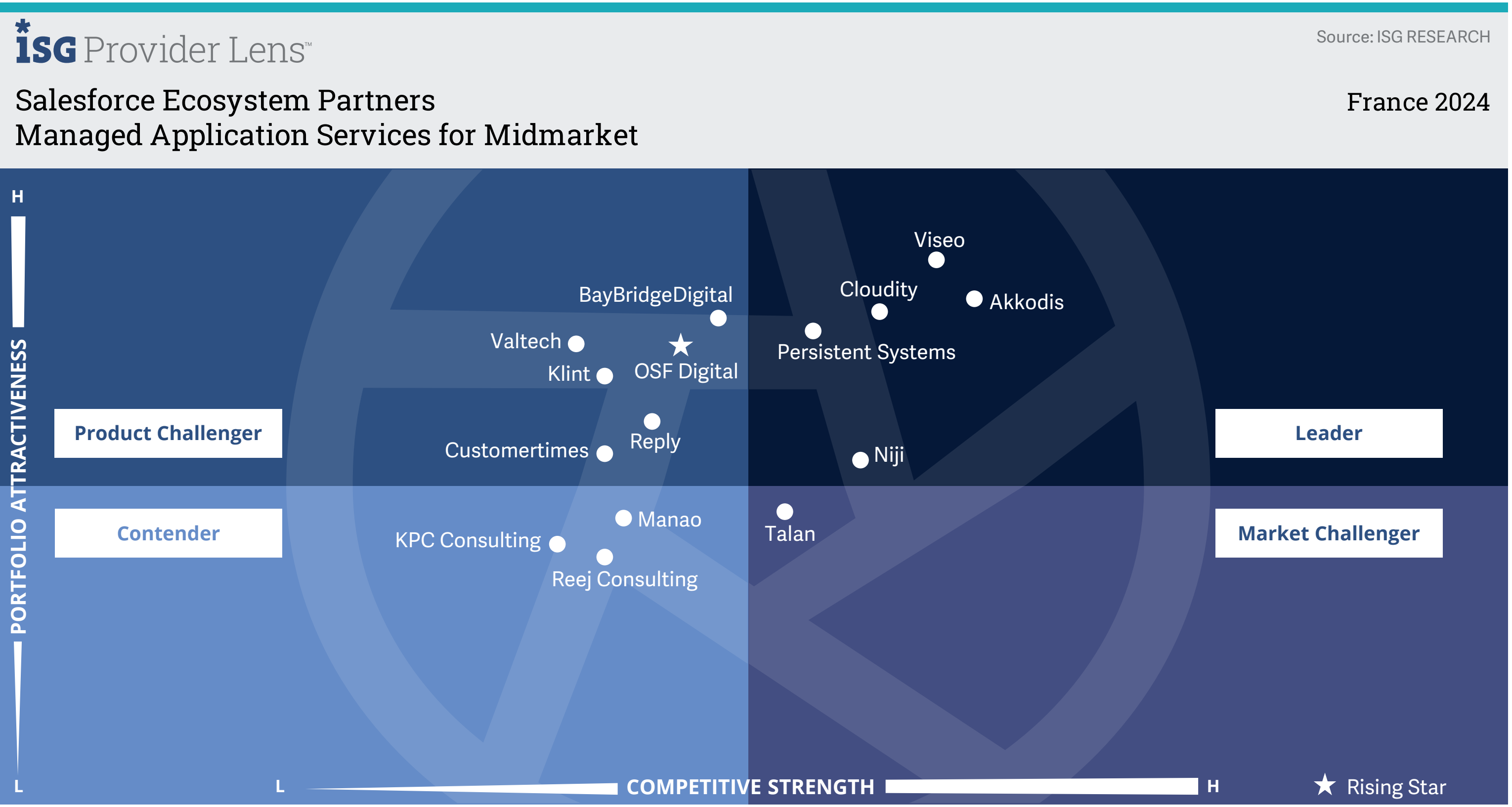
Small and midsize enterprises are seeking one-stop solutions for all their requirements related to Salesforce managed services. In contrast, service providers are expanding their portfolios and upgrading their Salesforce offerings by leveraging GenAI and automation.

Marketing and sales leaders should read this report to effectively analyze service providers' capabilities in implementing Salesforce MAS effectively, highlighting advanced managed service capabilities.

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

IT and technology leaders should read this report to compare providers' technical expertise, including monitoring, accelerators, incident response, automation and development methodologies.

Security and data professionals should read this report to understand how providers comply with French security laws for Salesforce integration and compare practices for better understanding.



This quadrant evaluates **service providers offering managed application services to midsize companies** using Salesforce clouds. These services include **maintenance, support, security, compliance and continuous improvement**.

Marcio Tabach

Definition

This quadrant focuses on providers' proficiency to deliver managed application services that encompass vital maintenance and support functions. These functions cover a comprehensive array of services, including monitoring, remote support, centralized administration of Salesforce applications, data quality management, and data security and compliance adherence.

Midmarket clients often have more modest integration requirements and tend to concentrate their operations within a specific region. They demand strong regional support, and providers in this quadrant are equipped to meet these requirements.

An essential aspect within this quadrant is the ongoing commitment to enhance the solutions offered. Providers constantly seek to improve and innovate their services to generate additional value for their clients. The capacity for ongoing refinement and adaptation is pivotal in a rapidly evolving business landscape.

Managed application services are defined by the transfer of key responsibilities to a dedicated service provider. These services are offered within the well-defined SLAs and network, ensuring that the clients' expectations are consistently met and exceeded.

Providers in this quadrant play a pivotal role in offering a regional focus and tailored support to midmarket clients while diligently catering to the intricate Salesforce applications, data quality and compliance requirements. These factors contribute to the continued growth and success of their clients' businesses.

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

Observations

A widespread practice among French providers is to establish operations in French-speaking nearshore locations, such as Morocco Tunisia and France's Reunion territory. These locations have historical ties with France and many French speakers.

Providers are offering implementation audits to fix bugs and glitches in implemented customer architectures. This practice helps to build a roadmap for enhancements to be developed by managed services.

From the 40 companies assessed for this study, 15 qualified for this quadrant, with five being Leaders and one a Rising Star.

AKKODIS

Akkodis leverages deep knowledge of the French market for proactive monitoring, incident resolution, customization, data management, user training and security.

Cloudity

Cloudity's sfdx-hardis tool streamlines CI/CD for Salesforce, replacing expensive solutions and demonstrating innovative expertise in managed services.

Niji

Niji enhanced its Salesforce-managed application services capabilities and presence in France by acquiring Altados in 2023.

Persistent

Persistent Systems' Intelligent Managed Support Services (iMSS) help ensure satisfaction by automating managed services with a self-help portal, early warning system and license optimizer.

VISEO

VISEO's onshore and nearshore AMS centers in Aix-en-Provence and Casablanca provide corrective maintenance, training and migrations.

OSF Digital

OSF Digital (Rising Star) optimizes customer licenses in experience cloud with a proprietary solution, offering efficient and high-quality managed services.

Implementation Services for Industry Clouds

Who Should Read This Section

This report is relevant to enterprises across all industries in France evaluating service providers offering implementation services for industry clouds. In this quadrant, ISG defines the current market positions of the service providers in France and identifies how they address the critical challenges associated with implementing industry clouds for Salesforce products.

This quadrant includes implementation service providers of Salesforce industry cloud products, such as Financial Services Cloud and Health Cloud. Industry-specific skills and appropriate accelerators are essential success factors for this segment. From a functional perspective, implementation services include process consulting, design, configuration, data clean-up, migration and go-live support.

In France, service providers substantially investing in and leveraging GenAI and automation tools. These tools help create pre-defined solutions consisting of industry clouds such as Net Zero Cloud, Nonprofit Cloud, Healthcare Cloud and Retail Cloud for quick implementation of Salesforce industry clouds without disrupting ongoing projects.

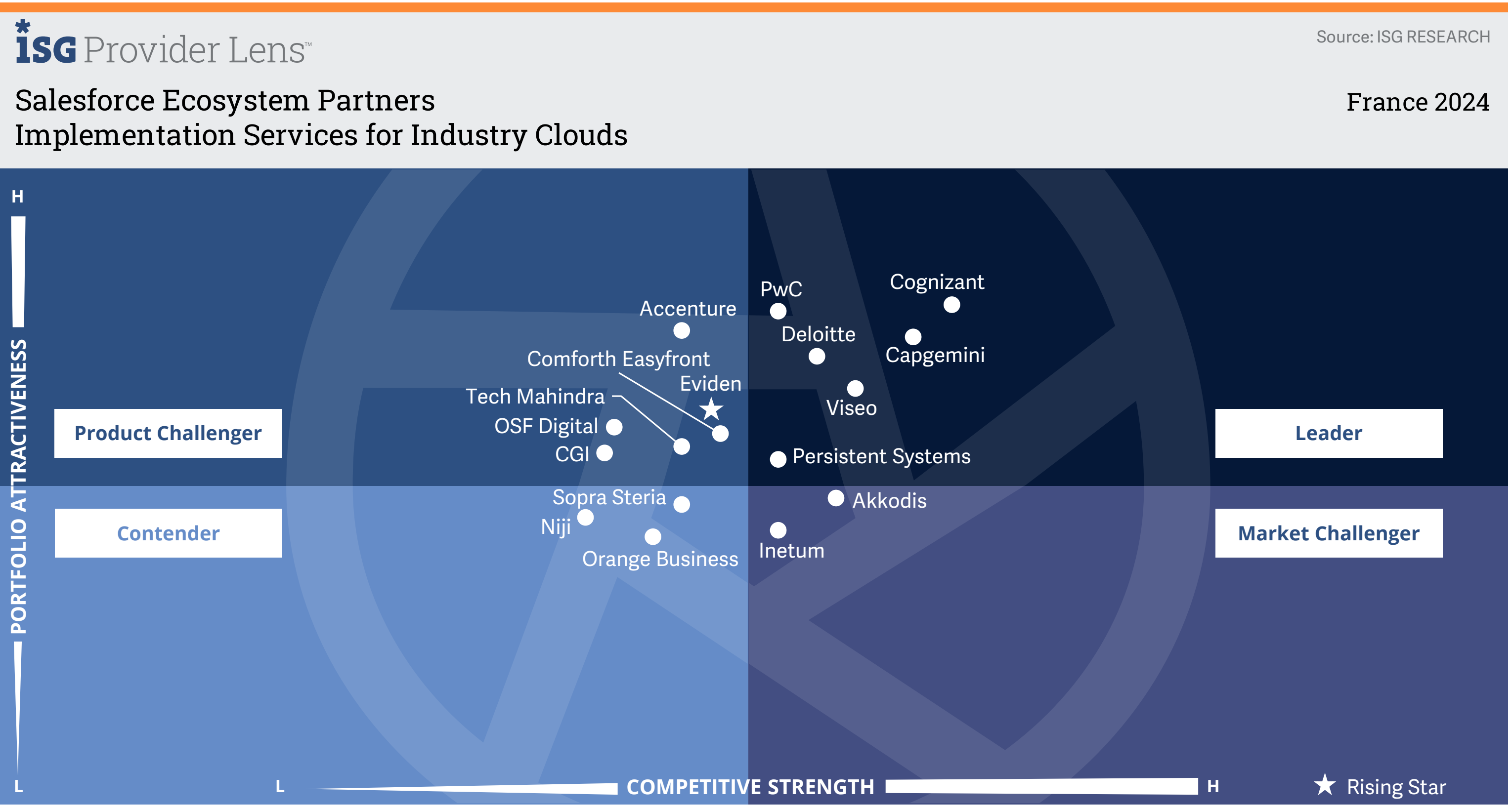
Service providers are also automating their industry-specific clouds that can be integrated with production-ready Salesforce industry cloud solutions with few or minor customizations. Such service providers are witnessing high demand in the French market.

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

IT and technology leaders should read this report to better understand providers' relative positioning and capabilities in adopting Salesforce industry cloud services and integration and analysis solutions.

Security and data professionals should read this report to understand how providers comply with French security laws for Salesforce integration and compare practices for better understanding.

Marketing and sales leaders should read this report to effectively analyze service partners' capabilities around industry clouds.



This quadrant evaluates service providers implementing **Salesforce Industry Clouds**, such as financial services cloud and health cloud, in the **French market**. It provides an assessment of their **strengths, differentiators and capabilities**.

Marcio Tabach

Definition

This quadrant assesses providers offering implementation services tailored to Salesforce's Industry Cloud products. These industry-specific offerings, such as Financial Services Cloud and Health Cloud, require unique skills and the deployment of relevant accelerators to ensure successful implementation. Having a deep understanding of the nuances and particularities within such specific industries is essential for providers in this segment.

Another pivotal aspect within this quadrant is the ability to craft holistic solutions by seamlessly integrating various Salesforce products. This skill enables providers to create comprehensive, tailored solutions that exactly match the unique needs of each client's specific situation. Salesforce's strategic shift toward increased verticalization underlines the growing significance of this capability, making it a top priority in new implementations.

From a functional perspective, the implementation services cover process consulting to optimize workflows, designing to create tailored solutions, configuration to ensure seamless system performance, data clean-up to enhance data quality, data migration to facilitate a smooth transition and go-live support to ensure the successful launch of these specialized Industry Cloud solutions.

Providers in this quadrant play a vital role in ensuring that businesses within specific industries harness the full potential of Salesforce's Industry Cloud products. Their industry-specific expertise and proficiency in integrating multiple Salesforce offerings empower organizations to tackle industry-specific challenges efficiently and gain a competitive edge in their respective fields.

Eligibility Criteria

1. Well-proven **domain expertise** for respective industries
2. Strong implementation capabilities (**consulting, configuration, data migration and go-live**) for the Salesforce Industry Cloud products and the products provided by Vlocity (recently taken over by Salesforce)
3. Deep knowledge of the **Salesforce data architecture**
4. Presence of **unique differentiators** such as proven industry-specific accelerators
5. Economic **stability and significant delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**

Observations

Most providers have an industry-oriented approach beyond their Salesforce offerings. It helps their sales teams build long-standing relationships with key customers and tailor each solution to specific needs.

Providers usually offer Salesforce Industry Clouds, or their own proprietary solution built on Salesforce platforms, to better meet industry-specific needs. The latter is done to differentiate their strategy from pure sale.

From the 40 companies assessed for this study, 16 qualified for this quadrant, with six being Leaders and one a Rising Star.

Capgemini

Capgemini partners with Salesforce for industry-specific solutions, driving transformation while committing to ambitious environmental targets.

cognizant

Cognizant offers industry-specific solutions such as MedVantage, InsurEleVate and Utility Next, with technologies specialized for the verticals.

Deloitte.

Deloitte leverages its expertise for specialized Salesforce industry solutions and has been recognized with multiple partner awards.

Persistent

Persistent Systems focuses on the healthcare, life sciences, financial services, hi-tech, communications and automotive industries, offering tailored Salesforce solutions and prioritizing value-based delivery and continuous optimization.

pwc

PwC utilizes deep industry knowledge to solve business problems, offering successful multicountry, multilanguage Salesforce Industry Clouds projects globally.

VISEO

VISEO excels in data science services, partnering with platforms such as Talend, Qlik, Databricks and Tableau, enabling sophisticated consumer analysis.

EVIDEN

Eviden (Rising Star) expands Salesforce Industry Cloud capabilities through acquisitions such as Edifixio in France and Profit4SF in the Netherlands.

Leader

Cognizant

"Cognizant's operations in France leverage local market insight and a sizable, certified workforce alongside world-class expertise. The company has developed a range of top-tier industry solutions to provide exceptional services to its customers."

Marcio Tabach

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 346,600 employees across 147 offices in 50 countries. In FY22 the company generated $19.4 billion in revenue, with Financial Services as its largest segment. In 2020, Cognizant acquired EI-Technologies, a Salesforce pure-play Partner headquartered in France. It has developed EI-Institut, an organization dedicated to qualifying and certifying professionals with Salesforce skills. The institute has alliances with national universities and qualifies 2,000 people annually.

Strengths

World-class industry solutions: Cognizant is a Level II specialist in industry products. The company has many industry-specific, award-winning and recognized industry solutions, such as MedVantage, InsurEleVate and Utility Next. In 2023, the company launched nine new industry-specific solutions. In addition, it has more than 800 Salesforce Industries-Certified consultants and more than 15 industry frameworks and solutions.

EI-Technologies industry specialization: EI-Technologies, a France-based acquired company, was a Level I industry product Specialist and Vlocity Partner before the Cognizant acquisition. The company has a vast clientele in over eight industries, including large and midsize companies, especially in financial services and insurance. As a Cognizant company, EI-Technologies couples a strong local market presence with Cognizant's world-class offerings.

Supply of qualified labor: Cognizant can meet the supply of qualified labor in France through its EI-Institut, a Salesforce-authorized training provider. The institute is certified by French authorities (Qualiopi certified), and it certifies thousands of professionals annually. It is an important initiative to continue the company's sustainable growth.

Caution

The information on Cognizant's AppExchange page dates back to 2020, while EI-Technologies' website displays figures from 2019. It is essential for the company to proactively update the information on its communication channels to ensure that stakeholders and clients have access to the most current and relevant data.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till January 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Salesforce Ecosystem Partners**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Human Resources

Region

▲ **Most satisfied**
Australia/New Zealand

▼ **Least satisfied**
Asia

Industry

▲ **Most satisfied**
Public sector

▼ **Least satisfied**
Oil and Gas

Industry Average CX Score

80.5

▲ Highest CX: 92
▼ Lowest CX: 60

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 380

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	53.4%
Nearshore	19.1%
Offshore	27.5%

Appendix

The ISG Provider Lens 2024 – Salesforce Ecosystem Partners study analyzes the relevant software vendors/service providers in France, based on a multiphased research and analysis process, and it positions these providers based on the ISG Research methodology.

Study Sponsor:
Aman Munglani

Lead Author:
Marcio Tabach

Editors:
Poulomi Nag and John Burnell

Research Analyst:
Puranjeet Kumar

Data Analyst:
Ilamaran Magesh

Consultant Advisor:
Yadu Singh

Project Manager:
Monika Pathak

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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 2024, 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

Author

Marcio Tabach

Distinguished Analyst

Marcio Tabach is an experienced management consultant, having led numerous assignments for multinationals and major local companies in Brazil in the past 14 years.

Currently, he is the Lead Analyst for ISG Analytics Services & Solutions, MarTech and Salesforce Ecosystem. He has experience in complex data analysis, cross referencing data and use of various analytic tools to support clients' strategic decisions. Previously, he has held marketing management positions in large companies within consumer goods and services.

In addition to his experience, Marcio has also been a guest lecturer in graduated management courses in Brazil. He holds a Full-Time MBA degree from the London Business School, two bachelor's degrees from renowned Brazilian business schools and a Data Scientist Certification. He is native in Portuguese, fluent in English and has professional working proficiency in French.

Enterprise Context and Global Overview Analyst

Puranjeet Kumar

Senior Research Analyst

Puranjeet Kumar is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Next-Gen ADM Solutions & Services and Salesforce Ecosystem. He supports the lead analysts in the research process and authors the global summary report, focal points, and quadrants reports. Puranjeet also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments.

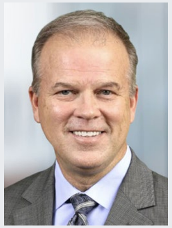
Prior to this role, he worked across several syndicated market research firms and has more than eight years of experience in research and consulting, with major areas of focus in collecting, analyzing, and presenting quantitative and qualitative data. His area of expertise lies across various technologies like application development, analytics, and salesforce ecosystem.

Study Sponsor

Aman Munglani

Director Ecosystem Studies,
Custom Research & Digital innovator series

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews. He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



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.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

MARCH, 2024

REPORT: SALESFORCE ECOSYSTEM PARTNERS