

Salesforce Ecosystem Partners

A research report comparing provider strengths,
challenges and competitive differentiators

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Salesforce accelerates its expansion, maintains growth and drives future innovation with Agentforce

Salesforce maintains a robust growth trajectory with a reported 9 percent year-over-year revenue increase. The company continues to deliver strong fiscal performance overall, reporting approximately \$37.9 billion in revenue for FY25, driven primarily by its robust subscription and support services. Its key product segments, including core CRM offerings and emerging cloud innovations, have contributed to these significant financial gains, supported by improved operating cash flow and margins.

However, recent market sentiment has been mixed. Despite Salesforce's leadership in the CRM market and ongoing investments in innovation, its share price, which had gained momentum following the announcement of the Agentforce platform, has experienced a

downturn partly attributed to the limited contribution from its new Agentforce platform and a weak short-term outlook.

This situation highlights a broader narrative — while Salesforce is pioneering a digital labor revolution through autonomous AI agents, the tangible impact of these innovations is still maturing.

The landscape of CRM and customer engagement is undergoing a profound transformation. Success is no longer defined solely by the ability to capture and store structured data; rather, the future favors those who can seamlessly integrate diverse data sources — both structured and unstructured — to create a comprehensive 360-degree view of customers. Recent advancements in data management have expanded traditional CRM boundaries, incorporating unstructured inputs such as social media content, emails and multimedia that were previously confined to isolated silos. This breakthrough enhances customer insights, fuels advanced analytics and underpins the deployment of autonomous, AI-driven services.

Salesforce's
Agentforce fuels
growth, but a
data integration
strategy
determines success.



As organizations transition into the era of AI-powered, agentic services, data integration emerges as a critical determinant of success. Simply implementing Salesforce is no longer sufficient; businesses must leverage integrated data to drive intelligent automation, deliver personalized experiences and streamline operations. In this new era, synthesizing disparate data points into actionable intelligence will define which companies thrive, thereby transforming CRM implementations and the overall business landscape.

Salesforce's competitive edge in Germany

Salesforce dominates the CRM market in Germany, despite fierce competition from global and local players. This dominance is particularly evident in references from industry leaders such as Mercedes Benz, Deutsche Bahn, Siemens and Deutsche Post DHL Group. SAP stands out as Salesforce's primary enterprise competitor in Germany, owing to its established ERP legacy and the ability to integrate CRM within the comprehensive SAP Customer Experience portfolio. However, it is typically chosen for environments that require

robust ERP integration. In contrast, Salesforce differentiates itself by focusing exclusively on cloud-based CRM and CX innovation. Its broad, modular Customer 360 platform offers best-of-breed applications for sales, service, marketing and commerce, all of which can be customized with minimal coding. This flexibility enables organizations in Germany to gain a 360-degree view of their customers while ensuring seamless interoperability with backend systems, including those by SAP.

Additionally, Microsoft Dynamics 365 poses strong competition for Salesforce in the midmarket segment, as businesses in this segment are already operating within the Microsoft ecosystem, leveraging the integration of Office 365 and Teams. However, Salesforce's extensive network of third-party applications and partners, combined with its established track record as the CRM market leader, sets it apart from niche providers such as HubSpot or Siebel/Oracle CX, which have a relatively limited presence.

Salesforce's strategy in Germany is further bolstered by its robust local partner ecosystem, continuous innovation and significant

investment in localized infrastructure. By delivering a reliable and scalable cloud that complies with stringent regional data regulations, Salesforce has emerged as the preferred platform for enterprises seeking comprehensive, customer-centric digital transformation in Germany.

The Mittelstand as an engine of growth

The new AI Index for the Mittelstand reveals that approximately 33 percent of midsize companies in Germany are already leveraging AI, highlighting the ongoing digital transformation within the region's economic infrastructure. According to the Deutscher Mittelstands-Bund, the German association for SMEs, Mittelstand is a major contributor to Germany's economic success, accounting for around 60 percent of the workforce and over 50 percent of the country's GDP. This underscores that innovative technologies such as AI are no longer optional but essential for continued growth.

This significant level of AI adoption enables Mittelstand firms to optimize processes, make data-driven decisions and sustainably

strengthen their competitiveness. Moreover, up to 45 percent of these companies plan to implement AI solutions in the coming years, emphasizing the tremendous potential of this technology trend.

This evolution presents significant opportunities for Salesforce and its ecosystem partners. Salesforce's flexible, scalable and data-driven CRM platform — augmented with state-of-the-art AI functionalities — provides the ideal foundation for Mittelstand firms to drive digital transformation. By harnessing integrated data solutions, these companies can strengthen customer relationships and transform their entire business processes, resulting in enhanced efficiency, improved CX and a sustainable competitive advantage.

Furthermore, Salesforce's collaboration with the Deutscher Mittelstands-Bund underpins this segment's strategic importance. Salesforce is positioning itself as a key partner for the Mittelstand, supporting them in successfully implementing AI and data-driven solutions. This partnership is critical for ensuring future business success in an increasingly digitalized world.



Headwinds and tailwinds

Expansion in Germany exposes Salesforce to a dynamic environment that presents both significant risks and promising opportunities. As it seeks to capitalize on its strong CRM and emerging AI capabilities, Salesforce must navigate a complex landscape of economic, regulatory, competitive and execution challenges while leveraging opportunities in digital transformation, industry-specific solutions and local market engagement.

Key challenges

- **Economic and market conditions:** Economic uncertainty and cautious IT spending among enterprises in Germany could hinder deal momentum. Skepticism surrounding early generative AI (GenAI) investments necessitates that Salesforce clearly demonstrate ROI to unlock budgets. Additionally, modest growth projections of 7–8 percent for FY2026 suggest a subdued demand environment, further intensified by robust competitive initiatives from SAP and Microsoft.

- **Regulatory and compliance challenges:** Operating in one of the world's highly regulated environments, Salesforce faces risks associated with the EU AI Act and evolving data sovereignty requirements. Ensuring that its AI products such as Einstein GPT and Agentforce meet high-risk AI standards and maintaining stringent data residency are critical for maintaining trust with clients in Germany.
- **Execution and implementation risks:** The rapid rollout of new features poses implementation challenges. Enterprises in Germany, already experiencing a skills shortage among local partners, may find it challenging to navigate the complexities of adopting advanced AI and automation tools. Inadequate change management and extended wait times for expert support could lead to diminished customer satisfaction and slow account expansion.

Key opportunities

- **Upselling AI and automation solutions:** Salesforce's early investments in GenAI position it to embed advanced AI tools

such as Einstein GPT and Agentforce into a broad range of deployments. A successful *land-and-expand* strategy can generate incremental revenue by integrating AI, analytics and automation across existing CRM solutions.

- **Expanding industry-specific offerings:** By focusing on tailored industry clouds, Salesforce can deepen its penetration in industries such as manufacturing, automotive, financial services and the public sector. The replication of success stories, such as improved sales efficiency in manufacturing, can serve as compelling proof points to the traditionally conservative market in Germany.
- **Strengthening local presence and trust:** Investments in local infrastructure, including data centers and a head office based in Munich, bolster Salesforce's commitment to the market. These initiatives, combined with collaborative efforts with local partners and community engagement, can enhance brand trust and reduce sales cycles.

- **Leveraging macro digital transformation:** As Germany advances its digital transformation initiatives under the Industrie 4.0 banner, Salesforce is well positioned to replace legacy systems with modern, cloud-based solutions. This digital shift not only enhances CX and operational efficiency but also contributes to broader economic growth, aligning Salesforce's success with Germany's digital agenda.

While Salesforce faces significant risks from economic headwinds, stringent regulatory frameworks and execution challenges, its strong technology portfolio and commitment to local investments present substantial growth opportunities in Germany. By focusing on demonstrable ROI in AI, enhancing industry-specific capabilities and reinforcing trust through localization, Salesforce is poised to not only maintain its leader position in the CRM market but also drive the next wave of digital innovation in Germany.



Industry-specific trends in Germany

A major trend in the Salesforce ecosystem in Germany is the increasing demand for industry-specific solutions. Enterprises in the region increasingly seek CRM systems customized to their specific industry needs rather than relying on one-size-fits-all tools. In response, Salesforce has adapted its product portfolio to include industry-specific cloud solutions, such as Financial Services Cloud for banking/insurance and Health Cloud for healthcare, which integrate Salesforce's CRM functionality with industry templates and compliance features, aligning with the expectations of enterprises in the region.

Earlier, ISG research had highlighted that the traditional Salesforce tools are often inadequate for many enterprises in Germany, as they need advanced functionality beyond the standardized feature set. In practice, sectors such as automotive and manufacturing (key contributors to Germany's economy) have embraced Salesforce to modernize sales and service processes, frequently enhancing it with custom solutions or specialized add-ons such as dealer management and IoT integration

for connected machines. Recognizing this, Salesforce acquired Vlocity in 2020 to strengthen its industry cloud capabilities, which has since facilitated the development of prebuilt processes for industries such as utilities and telecommunications, which are areas of growing interest in Germany.

Adoption patterns of Salesforce vary across sectors. Manufacturing and automotive firms like Siemens and Audi leverage Salesforce to connect dealers and customers, using its analytics to predict maintenance needs or personalize marketing efforts. In the financial services sector, firms improve client management and comply with customer data regulations using the Financial Services Cloud.

The public sector and healthcare organizations are also exploring Salesforce, albeit carefully. For example, healthcare providers in Germany are considering Health Cloud to manage patient outreach but must navigate data protection laws to ensure compliance.

The Mittelstand, exemplified by firms such as Villeroy & Boch, is increasingly embracing cloud CRM solutions to propel growth and

exports, often choosing Salesforce for its scalability as they outgrow simpler tools. This widespread demand has led to significant growth in Salesforce adoption across Germany, which, in turn, is straining the ecosystem's delivery capacity.

A notable bottleneck is the shortage of qualified Salesforce professionals in Germany. With the advent of AI, the demand has intensified and the necessary skill sets have expanded.

Service providers are experiencing high demand for implementation and integration projects, which contributes to market consolidation while fostering intensive partnerships wherein large system integrators collaborate with niche specialists to better address local requirements. Simultaneously, Salesforce partners are ramping up training programs to develop more certified consultants in Germany.

Regulatory compliance remains a critical factor in CRM deployments. Germany has stringent data protection laws and a strong privacy culture influenced by GDPR and local regulations, which has historically made some firms in the region hesitant to embrace cloud

services. Salesforce has addressed these concerns by investing in local infrastructure with data centers in Germany and a dedicated Hyperforce EU Operating Zone, which guarantees that customer data for EU clients can be stored and processed entirely within the EU by EU-based personnel.

This is especially relevant for regulated industries such as banking and the public sector in Germany, where maintaining data sovereignty is often a non-negotiable requirement. The availability of Hyperforce (Salesforce's next-gen platform on public cloud) allows enterprises in Germany to use Salesforce while meeting data residency requirements and ensures that support services are handled by EU staff for compliance with local standards.

Enterprises in the region are also evaluating Salesforce's tools in light of emerging regulations such as the EU AI Act, which will impose oversight on AI systems. Salesforce's focus on *trusted AI*, which includes features for dataset privacy, bias mitigation and audit trails in Einstein AI, is likely to be a selling point in highly regulated sectors.



Executive Summary

Overall, the market in Germany is characterized by increased demand for Salesforce solutions across sectors, balanced by careful consideration of compliance and customization needs.

Salesforce's growth in Germany is fueled by its ability to offer both innovation (such as AI and industry-specific solutions) and compliance (including data residency and security), as well as by strong digitalization trends in the country.

As companies in Germany continue their digital transformation efforts, factors such as government incentives for Industry 4.0, a national initiative to achieve AI leadership and the need to improve CX in competitive global markets serve as tailwinds for Salesforce's expansion.

However, the key challenge lies in efficiently delivering projects while ensuring Salesforce's solutions continue to align closely with the unique needs of specific industries and regulatory requirements in Germany.

Emerging AI technologies

Salesforce is rapidly integrating AI innovations into its platform, providing significant benefits

to enterprises. A centerpiece of these advancements is Einstein GPT, announced as the world's first GenAI for CRM. Einstein GPT combines Salesforce's proprietary AI models with leading large language models like OpenAI's ChatGPT, leveraging a company's trusted CRM data. This enables users to receive AI-generated content and recommendations in natural language. For instance, sales reps can draft emails or call summaries, developers can obtain code suggestions and marketers can auto-generate personalized campaign content.

By dynamically combining real-time customer data with GPT-driven text generation, Einstein GPT aims to boost employee productivity and enhance CX while meeting the stringent accuracy requirements of the market in Germany. Building on this, Salesforce introduced Einstein Copilot, a conversational AI assistant that is embedded directly into the user interface of Salesforce apps. Copilot enables employees and customers to interact with Salesforce data through natural language that is accessible via websites or portals. This feature allows users to receive immediate responses and trigger automated

actions, which is particularly advantageous in addressing complex customer queries and multilanguage support requirements.

Agentforce, a new platform for creating autonomous AI agents, is the next strategic advancement in Salesforce's AI initiatives. While Einstein GPT provides content and insights, Agentforce enables AI agents to take actions on behalf of users across Salesforce apps. An autonomous agent is essentially an AI that not only understands and responds to prompts but can also execute end-to-end tasks without human intervention. When assigned an objective, such as resolving a customer issue or qualifying a sales lead, an Agentforce agent can generate its subtasks, execute them (such as updating records, sending communications or initiating workflows within Salesforce) and iterate until the goal is achieved.

These agents continuously learn and improve, while operating around the clock. For businesses in Germany that prioritize process efficiency and accuracy, Agentforce provides a solution to automate routine interactions and processes at scale. For example, an Agentforce customer service agent can autonomously

resolve Tier-1 support inquiries by retrieving information from backend systems and delivering responses in German, requiring human intervention only when necessary. Early evidence of Agentforce's impact is promising. For example, in Salesforce's support site, Agentforce handled 380,000 customer conversations, achieving an 84 percent resolution rate, with only 2 percent requiring human intervention.

Salesforce has seamlessly integrated these AI capabilities into its Einstein 1 Platform, indicating that enterprises in Germany can benefit from AI that is directly plugged into their existing Salesforce data and processes, rather than relying on external AI tools. Moreover, Salesforce's open ecosystem approach allows businesses to integrate their own AI models if needed. Collaborative initiatives, such as the integration of Google's GPT-4 based Gemini model into Agentforce, further ensure access to cutting-edge AI while maintaining data residency controls.

In summary, Einstein GPT and Agentforce represent key growth areas for Salesforce. They enhance the intelligence and autonomy of



Salesforce's CRM offerings, which serve as a key differentiator in Germany, where companies are keen to leverage AI for productivity gains while adhering to stringent quality and compliance standards.

Multicloud capabilities: Paramount in the AI era

Salesforce and Google have recently expanded their strategic partnership, unveiling a major update that leverages Google's cutting-edge Gemini models to empower Salesforce's Agentforce platform. This collaboration is not just about deploying advanced AI; it underscores a broader, critical shift toward hybrid and multicloud architectures that enable enterprises to access best-of-breed solutions from multiple vendors and make it a strategic imperative for leading MSPs and GSIs.

By integrating the Gemini models with Agentforce, AI agents can efficiently tackle multimodal tasks. These agents can now process images, audio and video, as well as tap into real-time insights from Google Search via Vertex AI. Such capabilities enable businesses to handle complex, data-intensive scenarios —

whether tracking shipments in logistics, analyzing customer sentiment or processing multimedia customer interactions — all without compromising on speed or accuracy.

One of the key advantages of this expanded partnership is the enhanced flexibility it provides to customers. By enabling Salesforce Service Cloud to integrate more closely with Google's Customer Engagement Suite, enterprises can access advanced contact center functions such as real-time voice translation, intelligent agent handoffs and personalized recommendations. This flexibility is a direct outcome of leveraging a multicloud strategy, where the best features of each platform merge seamlessly.

Operating Salesforce's Agentforce, Data Cloud and Customer 360 on Google Cloud infrastructure can enable access to new regions and simplified procurement via the Google Cloud Marketplace. The use of Zero-Copy technology further enables a seamless, bidirectional flow of data between Google BigQuery and Salesforce Data Cloud. This indicates that enterprises can access, integrate

and utilize data from multiple sources in real time, overcoming traditional data silos and driving more informed decision-making.

Hybrid and multicloud environments are paramount in Germany, because they provide the agility that modern businesses require. Enterprises are no longer confined to a single vendor's ecosystem; they can now choose the best-of-breed tools that address their specific needs. This approach prevents vendor lock-in and optimizes overall performance, scalability and data security. In a landscape characterized by increasing data volumes and rising customer expectations, a unified, hybrid platform ensures that organizations can promptly deliver personalized experiences and actionable insights.

Moreover, this partnership highlights the importance of open ecosystems. Businesses benefit from the flexibility to select AI models and capabilities that best address their unique challenges. As organizations increasingly seek integrated solutions that span both on-premises and cloud environments, the need for robust hybrid and multicloud strategies has become paramount. This shift

not only enhances operational efficiency but also drives innovation across all facets of customer engagement.

In summary, the collaboration between Salesforce and Google exemplifies how hybrid and multicloud capabilities are transforming the future of AI-driven business solutions. By combining the strengths of Salesforce's enterprise platform with Google's advanced AI models and cloud infrastructure, businesses are equipped to break down data silos, scale rapidly and deliver next-generation CX. Progressing further into the era characterized by agentic and AI-powered solutions, these cloud strategies will be the cornerstone of digital transformation, empowering companies to thrive in an increasingly competitive global market.

Salesforce Hyperforce: A catalyst for cloud transformation

Salesforce Hyperforce represents a significant advancement in cloud architecture. By reimagining the deployment of cloud services, Hyperforce enables Salesforce's CRM and related services to operate on major public



clouds while maintaining robust security, compliance and scalability. This transformation is particularly significant for enterprises in Germany, which prioritize robust data protection, adherence to local regulations and sustainable practices.

Key aspects of Hyperforce that appeal to sustainability-focused organizations include:

- **Scalability and flexibility:** Hyperforce's modern architecture allows organizations to scale their operations seamlessly. This agility reduces the over-provisioning of resources and minimizes energy waste by ensuring that computing power is allocated efficiently based on demand.
- **Enhanced security and compliance:** Enterprises in Germany operate under stringent data protection laws. Hyperforce's ability to deploy Salesforce services on regional public clouds indicates that data residency requirements can be met without compromising performance or sustainability.
- **Optimized resource utilization:** By leveraging public cloud infrastructure that often incorporates energy-efficient data

centers, Hyperforce helps organizations reduce their carbon footprint while achieving high performance.

Net Zero Cloud: Empowering sustainable business

While Hyperforce redefines the infrastructure layer, Net Zero Cloud specifically targets sustainability management. As businesses become increasingly accountable for their environmental impact, Net Zero Cloud provides a comprehensive solution to measure, track and reduce carbon emissions.

In Germany, Net Zero Cloud offers the following benefits to enterprises:

- **Integrated sustainability reporting:** The platform consolidates data across an organization's operations, providing real-time visibility into carbon emissions, energy usage and other environmental metrics. This helps them adhere to Germany's rigorous sustainability standards and reporting requirements.
- **Actionable insights:** With its advanced analytics and AI-driven recommendations, Net Zero Cloud empowers decision-makers

to identify inefficiencies, optimize energy use and set realistic sustainability goals.

- **Transparency and accountability:**

As consumers and regulators increasingly seek transparency, companies using Net Zero Cloud can effectively communicate their sustainability progress. This capability builds trust among stakeholders and reinforces the brand's commitment to environmental responsibility.

The ability to seamlessly integrate sustainability data into existing business processes ensures that the journey toward net zero is both measurable and manageable. For businesses in Germany facing constant pressure to balance profitability with environmental stewardship, this is a breakthrough solution.

Drive toward a sustainable digital economy

Germany's commitment to sustainability is well documented, with ambitious national targets for reducing carbon emissions and promoting renewable energy. Enterprises in the region are increasingly adopting digital solutions that boost efficiency and support environmental goals. In this context, the combined capabilities

of Hyperforce and Net Zero Cloud are particularly relevant.

Key drivers for adoption:

- **Regulatory environment:** Germany's strict environmental regulations and the goal of achieving net-zero emissions by 2050 create an ideal environment for technologies that can deliver both business performance and sustainability benefits. Cloud solutions that integrate sustainability metrics help companies remain compliant with evolving regulations.
- **Renewable energy integration:** Germany is a leader in renewable energy. By leveraging data from energy-efficient public clouds and integrating it with Net Zero Cloud's tracking capabilities, organizations can optimize their energy consumption patterns and support broader sustainability initiatives.
- **Corporate social responsibility (CSR):** In Germany, consumers and investors increasingly favor companies that demonstrate a commitment to sustainability. Deploying state-of-the-art cloud solutions such as Hyperforce and Net Zero Cloud



allows organizations to enhance their CSR profiles, potentially driving better market positioning and customer loyalty.

The synergy between Hyperforce's efficient, scalable infrastructure and Net Zero Cloud's comprehensive sustainability management presents a compelling value proposition for businesses in Germany. This integration not only streamlines digital transformation efforts but also provides a strategic tool for reducing environmental impact. As Germany continues to lead in green innovation, companies that adopt these cloud solutions will be well positioned to achieve both operational excellence and sustainability targets.

The rise of agents — The augmented workforce

Autonomous AI agents, exemplified by Salesforce's Agentforce, are set to reshape business operations in Germany by automating tasks that previously required significant human intervention. These AI agents function as *digital coworkers*, capable of handling everything, from customer inquiries to internal processes. For instance, a Salesforce Agentforce bot could

automatically resolve routine support tickets, initiate follow-ups or support sales prospecting by engaging leads in natural language.

Immediate ROI: Clear benefits for businesses

Companies can enhance their efficiency and speed by entrusting repetitive or time-consuming tasks to AI agents. According to Salesforce's data, Agentforce agents have achieved high success rates, resolving customer requests with 84 percent accuracy without human intervention in early deployments. This indicates that many routine service interactions can be managed autonomously, freeing up human staff for more complex, value-added work.

The *digital labor* revolution is particularly appealing in Germany, where workforce shortages in areas like customer service and the urgent need to improve productivity present significant challenges. For example, in industries such as healthcare, autonomous agents have the potential to reduce administrative burdens. Research revealed that AI agents could eliminate up to 30 percent of healthcare paperwork. This addresses issues

such as burnout, allowing medical staff to dedicate more time to patient care.

By deploying Agentforce, a hospital or insurer in Germany could use always-on virtual assistants to handle tasks such as appointment scheduling, FAQ responses or claims processing, thereby improving service availability and consistency.

The societal implications of this shift can be significant. On the positive side, AI-driven automation can enhance human workers' capabilities by relieving them of monotonous tasks. This allows them to focus on creative, strategic or relationship-oriented aspects of their jobs, thereby increasing job satisfaction and necessitating the development of advanced skill sets.

Businesses in Germany might experience improved customer satisfaction as AI agents provide rapid responses and around-the-clock services. There is also a broader economic advantage, given that the widespread adoption of AI agents could boost productivity within the German economy. This shift can help companies remain competitive globally

while reducing operational costs. Salesforce envisions that these autonomous agents, customized via Agentforce, will function as a *fleet of superpowered assistants* available to every department.

Developers and IT professionals in Salesforce's ecosystem remain optimistic, envisioning AI agents as a means to advance in their careers. Moreover, autonomous agents could help address service gaps in society by providing support in remote areas or during after-hours. This capability is particularly valuable in a country like Germany, which has a widespread rural population and strict working hours for human staff.

However, there are risks and challenges associated with AI agents that society and businesses must navigate. The potential for job displacement is a key concern. For instance, as Agentforce automates specific tasks, such as entry-level customer support or basic data entry, these jobs may be displaced. Companies will need to effectively manage workforce transitions and retrain employees for advanced roles. Salesforce often emphasizes



the importance of reskilling, positioning its Trailhead learning platform as a resource to help people move into new roles in an AI-enabled workplace.

It is also important to consider ethical and trust-related implications. Autonomous agents must operate within the framework of company policies and German/EU laws. For example, ensuring AI decisions are transparent and non-discriminatory is crucial to avoid regulatory penalties and public backlash. Salesforce has implemented guardrails such as requiring human review for specific high-stakes AI actions and allowing companies to establish usage policies. However, it is crucial for organizations to continuously monitor their AI agents.

Data privacy is another societal consideration. The processing of customer data by AI agents for decision-making must be compliant with GDPR. Recognizing consumers' susceptibility to data handling practices, businesses in Germany deploying Agentforce must prioritize transparent communication and opt-out options to maintain trust.

Lastly, reliability and accountability in autonomous AI are new frontiers. If an AI agent makes a mistake (for example, in a financial recommendation or a customer refund), companies must have protocols for correcting the error and take responsibility, rather than blaming the algorithm. These considerations underscore the fact that while Agentforce and similar technologies are powerful, companies in Germany are rolling them out judiciously, often initiating pilot projects and carefully measuring outcomes.

Salesforce's strategy of integrating Agentforce into its trusted CRM platform provides organizations in Germany with a relatively controlled environment where they can explore the capabilities of autonomous agents.

Salesforce's commitment: Leveraging technology for positive business and societal change

The long-term societal impact of automation will depend on how well companies balance it with a human touch. The likely scenario is the emergence of an *augmented workforce*, where human expertise is combined with AI agents,

resulting in better outcomes that surpass those achievable by either entity independently. Salesforce and its community in Germany are actively engaging with policymakers and industry groups to ensure the widespread adoption of this technology benefits businesses, employees and customers alike. This approach reflects Salesforce's mantra of using technology to drive positive business and societal change.

Transitioning from managed services to managed agent services: The acceleration of Agentforce

Amid the ongoing surge in digital transformation, traditional SaaS models are evolving into platforms that seamlessly integrate intelligent, autonomous capabilities into business operations. Leaders such as Microsoft's CEO Satya Nadella and Salesforce's CEO Marc Benioff are at the forefront of this change, marking a pivotal moment for the Salesforce managed services community. This evolution offers a significant opportunity for MSPs to transition into managed agent service providers, unlocking new avenues for growth, innovation and enhanced client value.

The end of traditional SaaS and the rise of the agentic layer

- **A new era in cloud platforms:** Insights from Satya Nadella highlight a clear transition from conventional software models to agile, AI-integrated cloud platforms. The narrative that *SaaS is Dead* does not imply obsolescence; rather, it marks the beginning of an era where cloud services are defined by responsiveness, intelligence and autonomy. AI integration enables systems to optimize operations and act on behalf of users, fostering a dynamic, data-driven business environment.
- **Agentforce and the vision of digital agents:** Marc Benioff's introduction of Agentforce at Salesforce encapsulates this forward-thinking vision. The concept of an *agentic layer* envisions digital agents that extend beyond routine automation to participate in decision-making, customer interaction and operational management. Early adoption stories from Dreamforce and various partner deployments illustrate how these agents can enhance human capabilities and drive transformative business change.



Unlocking the opportunities for MSPs

1 Navigating integration complexity requires specialized expertise:

As enterprises adopt platforms powered by autonomous agents, integration becomes increasingly complex. The new agentic layer is not a plug-and-play solution; it requires the following:

- **Tailored configuration and customization:** Agents must align with specific business processes. MSPs must excel in designing precise guardrails, creating effective prompts and ensuring seamless integration with legacy systems.
- **Continuous optimization:** Autonomous systems require ongoing fine-tuning to maintain accuracy and responsiveness. Managed agent service providers can add value by offering continuous analytics and refinement services.

2 Delivering value-added services:

Transitioning to an agent-first operational model opens up several high-value service opportunities:

- **Security and governance:** As agents make autonomous decisions, robust security protocols and compliance measures become essential. MSPs can lead by establishing frameworks that ensure agents operate within secure, clearly defined parameters.
 - **Performance analytics:** As organizations leverage agentic systems, the ability to measure performance, ROI and overall efficiency becomes crucial. Providers that can deliver in-depth insights will stand out in the market.
 - **Client education and change management:** With many business leaders adapting to the agentic paradigm, MSPs can serve as trusted advisors by simplifying complexities and guiding clients through the transition.
- #### 3. Upskilling and technological investment:
- To fully capitalize on this opportunity, MSPs must invest in their teams and technology:
- **Training programs:** Equip staff with the knowledge required to design, deploy and manage AI-driven agents effectively.
 - **Tooling and partnerships:** Invest in robust integration tools and form strategic alliances with leading AI technology vendors to stay ahead of industry trends, as integration across ecosystems in multicloud environments is the new normal.

Navigating security, governance and compliance

Navigating security, governance and compliance is essential to ensuring the successful integration of autonomous agents. A comprehensive governance framework should be designed to establish clear operational boundaries for digital agents, implement robust risk management protocols that monitor and mitigate potential threats, and adhere to stringent compliance frameworks to meet industry standards and regulatory requirements.

Educating clients and facilitating change

Adopting an agent-first model is not only a technological shift but also necessitates significant cultural and operational changes within organizations. To ease this transition, MSPs must develop educational content that

articulates the benefits, potential risks and best practices for managing digital agents. Additionally, offering pilot programs can provide clients with firsthand experience of the transformative impact of autonomous agents, while dedicated change management support can help navigate the technical and cultural challenges that come with this new paradigm.

Outlook: Preparing for a transformed business landscape

The evolution from traditional managed services to managed agent services is more than just a technological upgrade; it represents a fundamental change in business operations. As organizations build their digital workforces, the enhanced efficiency, agility and intelligence provided by autonomous agents will redefine customer interactions, operational workflows and decision-making processes.

Recommendations for forward-thinking businesses

- **Act now:** Early adoption is crucial. Organizations that invest in developing or partnering for managed agent services can gain a significant competitive advantage.



- **Invest in talent and technology:** It is crucial to ensure the teams have the necessary skills and tools to fully leverage agentic platforms.
- **Prioritize security and compliance:** A robust governance framework is essential to safeguard data and maintain trust, as agents become integral to operations.
- **Embrace continuous innovation:** With the agentic landscape evolving rapidly, staying informed about emerging trends and being prepared to iterate are essential.

The Salesforce Agentforce ecosystem:



Source: Salesforce

The rise of Agentforce clearly illustrates that the era of static SaaS is evolving into a dynamic, AI-powered future, defined and accelerated by autonomous and agent-driven enterprises.

For those in the Salesforce managed services sector, this transformation is a strong opportunity to lead by evolving into managed agent service providers to help businesses embrace this shift strategically.

Key takeaways and observations for Quadrant 1: AI-powered Multicloud Implementation Services — Large Enterprises

Key characteristics of a strong Leader

A strong Leader in this quadrant combines technical innovation with strategic people-centric practices: Key attributes include:

- **Advanced technology integration:** Leaders demonstrate strong expertise, for example, in deploying AI and ML capabilities within multicloud environments. They focus on integrating Salesforce with ERP systems and legacy platforms while leveraging advanced solutions such as Agentforce and Data Cloud.
- **Robust change management:** The ability to manage the human aspects of digital transformations is a crucial factor. Strong leaders have proven OCM frameworks that ensure workforce adaptation and smooth transitions during complex implementations.

- **Thought leadership and compliance:** Leaders are not only early adopters of technological innovations but also active participants in Salesforce partnerships and advisory boards. This involvement reinforces their credibility and helps them stay ahead of regulatory and market changes.

Advice for service providers

1. **Invest in strong OCM capabilities:** Providers should further develop and highlight their change management frameworks. By incorporating structured change methodologies, agile user adoption strategies and clear OCM practices, they can help enterprises navigate complex transformations with minimal disruption. This not only builds trust but also accelerates successful adoption.
2. **Enhance local and regional expertise:** To address the regulatory and data sovereignty challenges in the market in Germany, providers must strengthen their local presence. This includes increasing the number of Germany-based, Salesforce-certified experts, showcasing regional



success stories and potentially expanding tailored solutions to cater to both midmarket clients and large enterprises.

Key takeaways

- **Integrated transformation:** Providers in this quadrant excel by combining Salesforce industry clouds with AI-driven innovations, advanced automation and multicloud integration. They deliver end-to-end solutions, from process consulting and system configuration to legacy system migration, ensuring that large enterprises harness the full potential of Salesforce in complex IT landscapes.
- **Holistic approach:** Beyond the technical aspects, the report emphasizes the importance of aligning technology with people-driven change. Robust organizational change management (OCM) is critical to help enterprises adapt to new processes, ensuring smooth transitions and accelerated time to value.
- **Compliance and scale:** The quadrant underscores the need for providers to build scalable delivery models and regional

capabilities that meet local regulatory requirements and data sovereignty concerns while ensuring high-quality, compliant implementations.

Key takeaways and observations for

Quadrant 2: Implementation Services for Core Clouds and AI Agents — Midmarket

Key characteristics of a strong Leader

A strong Leader in this quadrant effectively combines rapid, agile implementation with advanced AI integration. Key attributes include:

- **Agility and speed:** Leaders deliver Salesforce Core Cloud implementations quickly by utilizing standardized accelerators and agile project management, ensuring low complexity and fast time to value.
- **AI-driven innovation:** Leaders showcase robust integration of AI agents such as Agentforce, Einstein GPT and Einstein AI into the core Salesforce framework, providing intelligent automation, predictive insights and streamlined processes.
- **Seamless integration expertise:** Leaders are proficient in integrating Salesforce solutions with existing enterprise systems through

API-based architectures and real-time data synchronization, thereby enhancing overall system connectivity and performance.

- **Industry-specific customization:** Leaders tailor solutions to meet the unique needs of midmarket clients. They use prebuilt industry blueprints to deliver scalable, high-impact implementations that support digital resilience and operational efficiency.

Advice for service providers

1. **Invest in Agile methodologies and prebuilt accelerators:** Service providers should further develop and leverage preconfigured, industry-specific accelerators to meet the midmarket demand for rapid deployments. Embracing agile and low-code/no-code approaches will enable rapid implementations and help clients realize benefits quickly.
2. **Enhance AI integration capabilities:** Providers must continue to build robust use cases of AI solutions and Agentforce that clearly demonstrate their value. Strengthening AI-driven automation and ensuring seamless integration with core

systems such as ERP and BI will differentiate their offerings and drive enhanced decision-making and operational efficiency for midmarket businesses.

Key takeaways

- **Midmarket focus with agile delivery:** This quadrant targets midmarket companies leveraging Salesforce's core clouds, including Sales, Service, Commerce and Experience Clouds, along with proof-of-concept AI agents such as Agentforce and Einstein AI. Providers in this space use Agile methodologies to enable rapid, low-complexity deployments that help clients achieve quick operational improvements.
- **Prebuilt accelerators and industry-specific solutions:** The report highlights the increasing use of preconfigured accelerators and industry-specific blueprints. This approach significantly reduces implementation time and customization overhead, enabling midmarket clients to experience faster time to value with scalable, cost-effective solutions.



- **AI-enhanced automation and seamless integration:** A strong trend in the quadrant is the integration of AI-driven automation. Providers are differentiating themselves by delivering compelling AI use cases, ranging from intelligent workflows to predictive analytics, coupled with seamless integrations using MuleSoft and API-based architectures across ERP, BI and other enterprise systems.

Key takeaways and observations for

Quadrant 3: Implementation Services for Marketing and Commerce with AI Enablement

Key characteristics of a strong Leader

A strong Leader in this quadrant effectively combines deep technical expertise with strategic vision. Key attributes include:

- **Hyperpersonalized experiences:** By integrating robust AI and real-time analytics into Salesforce Marketing and Commerce solutions, Leaders enable brands to execute personalized, data-driven campaigns that significantly enhance customer engagement.

- **Seamless integration and scalability:** Leaders ensure smooth, cross-cloud orchestration that unifies disparate systems into a cohesive, omnichannel CX. This not only drives efficiency but also supports scalable, measurable outcomes.
- **Strategic advisory and industry-specific solutions:** Leaders differentiate themselves by offering tailored accelerators and expert consulting services that address both local market nuances and global best practices, ensuring sustainable digital transformation. Strong Leaders not only transform the marketing and commerce technology stack but also have leading capabilities to transform brands holistically.

Advice for service providers

1. **Deepen AI integration and showcase ROI:** Service providers must invest in further enhancing their AI capabilities, particularly around Einstein AI, GenAI and Agentforce, to deliver tangible, measurable improvements in personalization and campaign effectiveness. They should document and

share case studies that illustrate clear business outcomes and demonstrate compliance with local market standards.

2. **Strengthen cross-cloud integration with prebuilt accelerators:** Providers must develop and refine industry-specific, preconfigured accelerators that seamlessly integrate Salesforce Marketing and Commerce Clouds with other enterprise systems. This approach will reduce implementation time, minimize customization overhead and ensure a unified omnichannel experience for clients.

Key takeaways

- **AI-driven marketing and commerce:** Providers in this quadrant focus on enabling hyperpersonalized CX by integrating Salesforce Marketing and Commerce Clouds with advanced AI capabilities such as Einstein AI, GenAI and Agentforce. This integration drives data-driven marketing, real-time analytics and omnichannel automation.

- **Cross-cloud orchestration and real-time insights:** The quadrant highlights the importance of seamless integration across disparate systems, including Marketing, Commerce and Data Clouds, to deliver unified customer journeys. Predefined accelerators and industry-specific blueprints help reduce complexity and speed up deployments.
- **Strategic transformation for enhanced CX:** With a focus on measurable ROI and scalable implementations, providers are increasingly leveraging AI for predictive analytics, content generation and autonomous decision-making, ensuring that brands can engage customers more effectively and drive revenue growth.

Key takeaways and observations for Quadrant 4: Managed Application Services — Large Enterprises

Key characteristics of a strong Leader

A strong Leader in this quadrant blends global delivery capabilities with localized expertise. The key attributes include:



- **AI integration for proactive management:** Leaders integrate advanced AI technologies to create self-healing systems and predictive service models that minimize downtime and reduce manual intervention.
- **Scalable, end-to-end support:** Leaders offer comprehensive, outcome-driven managed services that cover all aspects of Salesforce operations, ranging from system monitoring to compliance management, ensuring a robust, secure and continuously optimized environment.
- **Global reach with local compliance:** Leaders maintain enterprise-grade service standards through a global network of support centers while tailoring services to meet local regulatory and market demands, thereby achieving operational excellence and building trust in the market in Germany.

Advice for service providers

1. **Invest in advanced predictive analytics:** Providers must enhance their managed service offerings by strengthening AI-driven automation and predictive maintenance capabilities. By demonstrating reduced

downtime and improved incident resolution through case studies, they can build client confidence and showcase tangible ROI.

2. **Adopt flexible, outcome-based pricing models:** Providers should focus on refining their pricing and contract models to emphasize outcome-based approaches. By aligning service delivery with clear business metrics and offering flexible engagement options, they can better cater to the evolving needs of large enterprises while reinforcing long-term partnerships.

Key takeaways

- **Enterprise-scale managed services:** Providers in this quadrant specialize in managing and optimizing complex Salesforce environments for large enterprises. Their services cover continuous monitoring, centralized application management, data quality assurance, and strict regulatory compliance, all delivered on a global scale.
- **AI-driven automation and proactive support:** A key trend is the integration of AI technologies such as Salesforce Einstein

AI, GenAI and Agentforce into managed services. This enables predictive incident resolution, self-healing infrastructures and proactive monitoring that drive cost efficiencies and enhance operational resilience. Managed agents can become the new accelerator for Salesforce managed services.

- **Outcome-based and scalable solutions:** Providers differentiate themselves through mature pricing and contract models focused on measurable outcomes. They leverage robust methodologies and cross-cloud expertise to ensure seamless integration, continuous improvement, and global reach while adhering to local regulations.

Key takeaways and observations for

Quadrant 5: Managed Application Services — Midmarket

Key characteristics of a strong Leader

A strong Leader in this quadrant combines deep regional expertise with robust, AI-powered managed service capabilities. The key attributes include:

- **Comprehensive, modular support:** Leaders deliver localized end-to-end Salesforce administration, proactive monitoring and continuous system optimization through structured and customizable service packages.
- **AI-driven proactive maintenance:** By integrating predictive analytics and automation, Leaders minimize downtime, reduce operational risks and ensure ongoing service improvements.
- **Compliance with local regulations and value delivery:** Leaders maintain a strong regional presence that ensures data security and regulatory compliance, while their outcome-based pricing models demonstrate clear business value for midmarket clients. These providers often offer industry-specific solutions and services, making them strategic partners for global organizations.

Advice for service providers

1. **Strengthen AI and predictive capabilities:** Providers must enhance their service offerings by further integrating AI-driven automation and predictive analytics. By



showcasing real-time monitoring and proactive maintenance through detailed case studies, they can build client trust and demonstrate clear ROI.

2. **Tailor service packages with regional expertise:** Providers must focus on developing modular, outcome-based pricing structures that cater to midmarket needs. By strengthening local support and leveraging regional compliance expertise, they can ensure their managed services are both flexible and cost-effective for midmarket enterprises.

Key takeaways

- **Regional and modular focus:** Providers in this quadrant specialize in end-to-end Salesforce managed services for midmarket businesses. They emphasize strong regional support, tailored service packages and outcome-based pricing models to meet midmarket clients' integration requirements.
- **AI-driven proactive management:** The quadrant highlights the growing role of AI automation and predictive analytics in managing Salesforce environments.

Proactive monitoring, automated issue resolution and continuous optimization help midmarket clients minimize downtime and reduce operational risks.

- **Compliance and continuous improvement:** Ensuring data quality, security and compliance is a central tenet. Providers are dedicated to ongoing enhancements and innovation, generating additional value through continuously refined managed services.

Key takeaways and observations for Quadrant 6: Implementation Services for Industry Clouds

Key characteristics of a strong Leader

A strong Leader in this quadrant combines deep industry expertise across sectors with a broad portfolio of solutions and tailored accelerators. The key attributes include:

- **Industry expertise and strategic adaptation:** Leaders exhibit deep domain knowledge and leverage tailored accelerators to address industry-specific challenges,

while continuously adapting through proactive change management to drive lasting transformation.

- **AI-driven efficiency and personalization:** Leaders integrate advanced AI tools such as predictive analytics and Agentforce to optimize workflows, enhance customer engagement and deliver real-time, data-driven insights.
- **Holistic integration and regulatory compliance:** Strong Leaders provide end-to-end, compliance-ready solutions that seamlessly integrate multiple Salesforce products with existing enterprise ecosystems, ensuring robust operational security and regulatory adherence.

Advice for service providers

1. **Develop and showcase industry accelerators:** Providers must invest in enhancing their portfolio of prebuilt, industry-specific accelerators that simplify implementation and drive faster time to value. By sharing detailed case studies

and measurable outcomes, they can build client confidence in their ability to address industry-specific challenges.

2. **Strengthen local support:** Providers must expand their onshore support teams with deep regional and industry expertise to ensure that their implementations meet local regulatory requirements and cultural expectations. This localized focus can improve user adoption and long-term customer satisfaction.

Key takeaways

- **Tailored industry expertise:** Providers in this quadrant specialize in Salesforce industry clouds implementations, delivering solutions tailored to industry-specific needs, such as Financial Services and Health Cloud. They leverage deep domain knowledge and prebuilt industry accelerators to address unique regulatory and operational challenges.



- **AI-driven automation and real-time insights:** The integration of AI-powered tools such as predictive analytics, ML, Data Cloud and Agentforce enhances process efficiency, personalization and compliance. This enables enterprises to achieve real-time insights and optimized workflows.
- **Compliance and end-to-end integration:** A key differentiator is the ability to deliver holistic, compliance-ready solutions that seamlessly integrate multiple Salesforce products with existing enterprise ecosystems, ensuring both regulatory adherence and operational excellence.

Innovations such as Agentforce drive a digital labor revolution, while a holistic data integration strategy empowers intelligent automation. This approach delivers a 360-degree customer view, empowering large enterprises and the Mittelstand to excel in digital transformation. By seamlessly integrating structured and unstructured data, Salesforce drives hyperpersonalized experiences, solidifying its position as the go-to platform.





Provider Positioning

Page 1 of 5

	AI-powered Multicloud Implementation Services – Large Enterprises	Implementation Services for Core Clouds and AI Agents – Midmarket	Implementation Services for Marketing and Commerce with AI Enablement	Managed Application Services – Large Enterprises	Managed Application Services – Midmarket	Implementation Services for Industry Clouds
Accenture	Leader	Not In	Leader	Leader	Not In	Leader
adesso SE	Not In	Leader	Leader	Not In	Leader	Leader
Aquilliance	Not In	Product Challenger	Not In	Not In	Contender	Not In
Assist Digital	Not In	Contender	Contender	Not In	Not In	Not In
BearingPoint	Not In	Contender	Not In	Not In	Product Challenger	Not In
Brighter Cloud	Not In	Contender	Not In	Not In	Not In	Not In
Capgemini	Leader	Not In	Leader	Leader	Not In	Leader
CGI	Contender	Not In	Not In	Product Challenger	Not In	Not In
Cloud Monsters	Not In	Product Challenger	Contender	Not In	Product Challenger	Contender





Provider Positioning

Page 2 of 5

	AI-powered Multicloud Implementation Services – Large Enterprises	Implementation Services for Core Clouds and AI Agents – Midmarket	Implementation Services for Marketing and Commerce with AI Enablement	Managed Application Services – Large Enterprises	Managed Application Services – Midmarket	Implementation Services for Industry Clouds
Cludity	Not In	Rising Star ★	Not In	Not In	Product Challenger	Not In
Cognizant	Leader	Not In	Leader	Leader	Not In	Leader
Customertimes	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Deloitte	Leader	Not In	Leader	Leader	Not In	Leader
Deutsche Telekom	Not In	Leader	Leader	Not In	Leader	Leader
DIA	Not In	Leader	Product Challenger	Not In	Leader	Contender
DIGITALL	Not In	Leader	Leader	Not In	Leader	Contender
dotSource	Not In	Leader	Not In	Not In	Product Challenger	Contender
Eigenherd	Not In	Leader	Not In	Not In	Contender	Not In



 Provider Positioning

	AI-powered Multicloud Implementation Services – Large Enterprises	Implementation Services for Core Clouds and AI Agents – Midmarket	Implementation Services for Marketing and Commerce with AI Enablement	Managed Application Services – Large Enterprises	Managed Application Services – Midmarket	Implementation Services for Industry Clouds
EPAM Systems	Product Challenger	Not In	Not In	Contender	Not In	Not In
Eviden (Atos Group)	Product Challenger	Not In	Contender	Product Challenger	Not In	Contender
Factory42	Not In	Leader	Product Challenger	Not In	Leader	Product Challenger
Fujitsu	Contender	Not In	Not In	Contender	Not In	Not In
HCLTech	Leader	Not In	Product Challenger	Leader	Not In	Leader
IBM	Leader	Not In	Product Challenger	Leader	Not In	Leader
ilum:e informatik	Not In	Contender	Not In	Not In	Contender	Not In
Infosys	Leader	Not In	Leader	Leader	Not In	Leader
KPMG	Contender	Not In	Not In	Not In	Not In	Not In





Provider Positioning

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	AI-powered Multicloud Implementation Services – Large Enterprises	Implementation Services for Core Clouds and AI Agents – Midmarket	Implementation Services for Marketing and Commerce with AI Enablement	Managed Application Services – Large Enterprises	Managed Application Services – Midmarket	Implementation Services for Industry Clouds
LTIMindtree	Product Challenger	Not In	Product Challenger	Rising Star ★	Not In	Product Challenger
Mindcurv	Not In	Product Challenger	Product Challenger	Not In	Product Challenger	Contender
mindsquare	Not In	Contender	Not In	Not In	Contender	Not In
Nagarro	Not In	Contender	Not In	Not In	Contender	Not In
NTT DATA	Rising Star ★	Not In	Not In	Rising Star ★	Not In	Product Challenger
OSF Digital	Product Challenger	Not In	Not In	Not In	Not In	Not In
Persistent Systems	Not In	Product Challenger	Contender	Not In	Product Challenger	Product Challenger
PwC	Leader	Not In	Product Challenger	Product Challenger	Not In	Product Challenger
Reply	Leader	Not In	Leader	Product Challenger	Not In	Product Challenger





Provider Positioning

Page 5 of 5

	AI-powered Multicloud Implementation Services – Large Enterprises	Implementation Services for Core Clouds and AI Agents – Midmarket	Implementation Services for Marketing and Commerce with AI Enablement	Managed Application Services – Large Enterprises	Managed Application Services – Midmarket	Implementation Services for Industry Clouds
Salesfive	Not In	Leader	Leader	Not In	Leader	Product Challenger
Sopra Steria	Contender	Not In	Not In	Contender	Not In	Not In
TCS	Product Challenger	Not In	Product Challenger	Leader	Not In	Product Challenger
Tech Mahindra	Product Challenger	Not In	Product Challenger	Leader	Not In	Rising Star ★
UST	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Wipro	Leader	Not In	Rising Star ★	Leader	Not In	Leader



Key go-to-market focus for **Salesforce Ecosystem Partners** in the Implementation (change) and Managed Application (run) Services businesses.

Simplified Illustration Source: ISG 2025

AI-powered Multicloud Implementation Services – Large Enterprises

Implementation Services for Core Clouds and AI Agents – Midmarket

Implementation Services for Marketing and Commerce with AI Enablement

Managed Application Services – Large Enterprises

Managed Application Services – Midmarket

Implementation Services for Industry Clouds

Definition

The Salesforce Ecosystem study will examine 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 target clients, 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 will also include quadrants examining focused offerings, which are the sweet spot for a large pool of participants within the ecosystems and are sought after by clients. As a yearly investigation, running for the seventh consecutive year, this annual study is constantly updated to reflect Salesforce's

year-over-year innovations, leading to occasional adjustments in the existing quadrants. For example, the Marketing Automation quadrant was adjusted last year to cover services beyond midmarket. The study's updates also allow us to adapt our examination of existing quadrants, incorporating the innovation that Salesforce introduces to improve its cloud offerings. This year, Salesforce's consolidated product strategy for Data Cloud, Einstein, Einstein GenAI and Agentforce products across its portfolio has been considered in our analysis.



Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: AI-powered Multicloud Implementation Services – Large Enterprises, Implementation Services for Core Clouds and AI Agents – Midmarket, Implementation Services for Marketing and Commerce with AI Enablement, Managed Application Services – Large Enterprises, Managed Application Services – Midmarket and Implementation Services for Industry Clouds.

The ISG Provider Lens™ Salesforce Ecosystem Partners 2025 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on markets, including the U.S., U.K., Germany and Brazil.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has 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.

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 follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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.

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.





AI-powered Multicloud Implementation Services – Large Enterprises

Who Should Read This Section

This report is valuable for service providers and large enterprises offering AI-powered multicloud implementation services in Germany to understand their market position and for large enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers to enterprises, with a comprehensive overview of the market's competitive landscape and how each provider addresses key regional challenges.

Technology professionals

Managing platforms supporting end-to-end processes should read this report to see how Salesforce Data Cloud and MuleSoft integrate with data lakes and other enterprise platforms.

Digital professionals

Tasked with furthering digital transformation within the enterprise should read this report to understand how AI is being infused across Salesforce's portfolio of solutions.

Business professionals

Should read this report to identify use cases delivered by Salesforce Cloud when integrated within the enterprise's complex IT landscape and their associated business benefits.

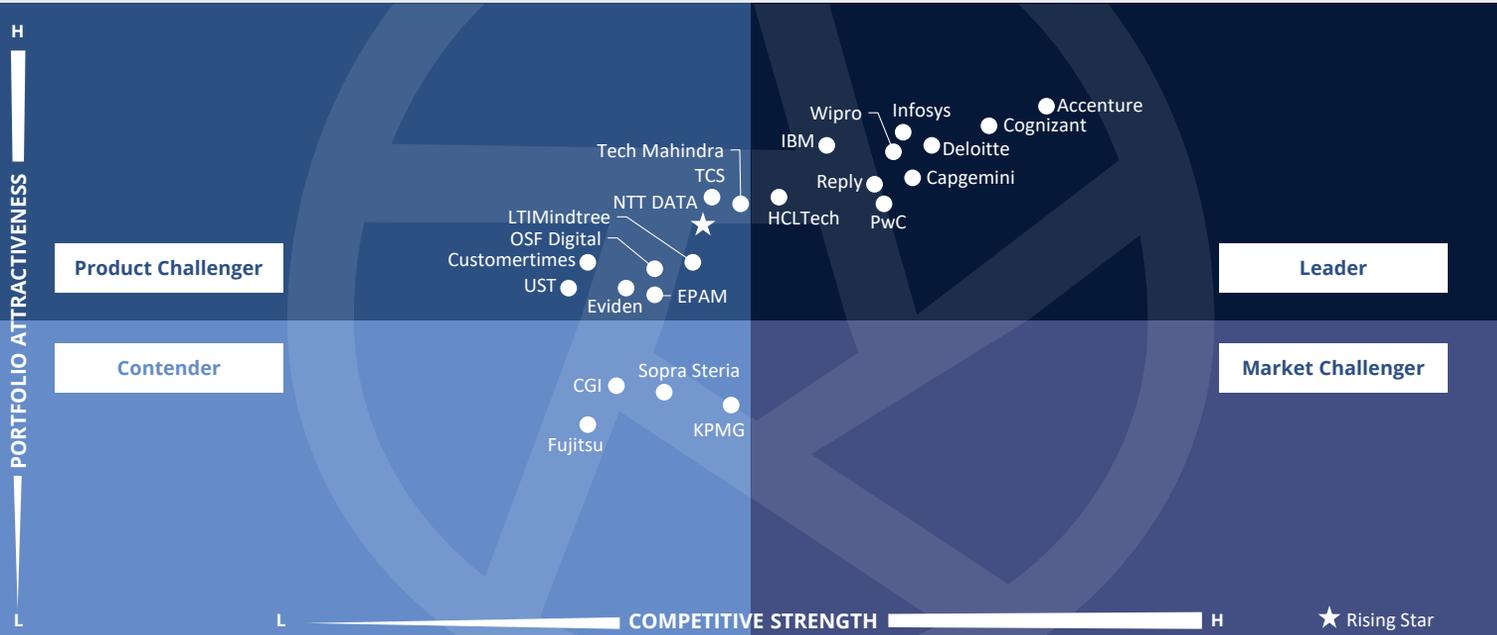
Procurement professionals

Should read this report to understand how Salesforce providers compare their strengths and the areas that still need improvement.



Salesforce Ecosystem Partners
AI-powered Multicloud Implementation Services – Large Enterprises

Germany 2025



Providers in this quadrant **accelerate** enterprise transformation by **integrating Salesforce Cloud Solutions**, AI-driven innovations and advanced automation **in complex ecosystems**, with cross-cloud orchestration and OCM to align technology with people-driven change.

Roman Pelzel



AI-powered Multicloud Implementation Services – Large Enterprises

Definition

This quadrant focuses on providers of Salesforce implementation services, emphasizing their integration with key enterprise software and data repositories used by large global businesses.

The study acknowledges the complex IT environments of clients relying on various Salesforce components. This complexity necessitates a comprehensive approach to long-term program implementation, often involving multiple rollouts across different divisions and regions.

These services focus on process consulting, custom solution design, system configuration, legacy system migration and go-live support. They also include data cleanup, orchestration and AI and ML enablement to improve business accuracy and efficiency. 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 support**) across all Salesforce products
2. **Deep knowledge** of 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. Expertise in the **design and delivery of AI and ML** capabilities, leveraging multiple data sources **as part of multicloud** implementations
5. Availability of **predefined solutions** and accelerators, preferably both functionally oriented and industry-specific
6. Delivery **capabilities at scale** to serve large enterprise clients
Compelling list of **use cases and references**



AI-powered Multicloud Implementation Services – Large Enterprises

Observations

The multicloud implementation services market is rapidly evolving as enterprises seek integrated solutions that connect Salesforce's ecosystem with broader IT landscapes.

Providers in this quadrant excel in AI-powered, enterprise-scale Salesforce transformations, integrating multicloud environments with advanced AI, automation and data orchestration to break down silos and enhance agility. They have deep expertise in connecting Salesforce clouds with ERP systems and cloud platforms such as AWS, Google Cloud and Azure, leveraging strong MuleSoft and Data Cloud skills. Their industry-specific accelerators ensure compliance with industry regulations and AI governance, while their delivery models provide global scalability and regional adaptability.

Beyond technology, providers differentiate themselves through robust OCM capabilities, ensuring that Salesforce-driven transformations address technological complexity and workforce adaptation.

Leaders in this quadrant demonstrate substantial thought leadership, often serving on Salesforce partnership advisory boards to drive innovations and provide clients with early access to new features and insights. By balancing AI-driven automation, multicloud integration, scalable enterprise delivery and OCM, they enable enterprises to achieve successful Salesforce transformations.

Product Challengers have notable AI and multi-cloud competencies, yet their limited local presence, references or brand awareness constrain them from becoming leaders.

Contenders are often regional or niche specialists with dedicated solutions. While they bring focused expertise, they must invest in their portfolio and market reach to move across the quadrant.

From the 42 companies assessed for this study, 23 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture leads AI-powered Salesforce transformations with first-mover adoption of Agentforce, scalable multicloud integration and effective change management. The company's industry-specific accelerators and expertise drive automation and innovation at scale.

Capgemini

Capgemini drives AI-powered Salesforce multicloud transformations in Germany by integrating Einstein AI, Data Cloud and automation. Its deep industry expertise, scalable cloud architecture and compliance-ready solutions enable enterprises to enhance customer engagement.

cognizant

Cognizant's AI-driven Salesforce expertise combines multicloud integration, automation and real-time insights. With industry accelerators, MuleSoft proficiency and a growing regional presence, Cognizant helps enterprises enhance their CRM, CX and operational efficiency.

Deloitte.

Deloitte connects Salesforce with legacy ERP and supply chain systems through MuleSoft-driven automation. Its Trustworthy AI™ framework fosters responsible AI adoption, while hybrid cloud synchronization ensures secure, scalable multicloud transformations.

HCLTech

HCLTech's AI-driven Salesforce solutions leverage Agentforce, Data Cloud and multicloud integration to optimize CX and business automation. Its global innovation labs and industry-specific AI accelerators enable enterprises to unlock AI-powered efficiencies.

IBM.

IBM delivers trusted AI-powered Salesforce solutions by integrating watsonx AI with Einstein 1 Platform for predictive automation. Its expertise in hybrid cloud, ecosystem interoperability and enterprise-grade AI governance make it a preferred choice for regulated industries.



AI-powered Multicloud Implementation Services – Large Enterprises



Infosys is a leader in AI-driven Salesforce implementations, integrating predictive automation, its CX AI Suite and cross-cloud workflows. Combining Fluidio's regional expertise with Simplus' AI innovation, Infosys ensures compliance-ready, scalable and locally optimized Salesforce solutions.



PwC specializes in large-scale Salesforce implementations, integrating AI, Data Cloud and advanced analytics for seamless enterprise modernization. Its ability to orchestrate end-to-end business transformations ensures interoperability and maximizes digital efficiency.



Reply utilizes AI, ML and Data Cloud to unify customer data, enhance automation and drive business value. Its expertise in API-led integration with MuleSoft ensures seamless connectivity across Salesforce and enterprise applications for optimized CX and efficiency.



Wipro's expansive global delivery model ensures seamless Salesforce implementations with AI-driven automation and deep ERP integration. Its industry-specific accelerators and strong regional presence in Germany drive compliance, efficiency and innovation at scale.



NTT DATA (Rising Star) offers AI-first Salesforce solutions with Einstein AI, Data Cloud and MuleSoft automation. Its DSGVO-compliant multicloud integration approach and intelligent automation capabilities ensure rapid, scalable and efficient transformations.



Cognizant



“Cognizant’s AI-first strategy, multicloud expertise, deep Salesforce capabilities, industry partnerships and proven track record position it as a strong partner for enterprises aiming to future-proof their CRM and CX strategies.”

Roman Pelzel

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 336,800 employees across over 50 countries. In FY24 the company generated \$19.7 billion in revenue, with Health Sciences as its largest segment. With its global Salesforce expertise, AI-driven multicloud capabilities, deep industry specialization and innovation leadership, Cognizant is a preferred implementation partner for enterprises in Germany. It enables businesses to maximize Salesforce ROI and accelerate digital transformation through AI-driven automation, integrations across ecosystems and industry-specific accelerators. Salesforce has honored Cognizant with two 2024 Partner Innovation Awards in the Core CRM and AI category.

Strengths

AI-powered multicloud innovation for large enterprises: Cognizant delivers AI-driven Salesforce transformations by integrating Agentforce, Data Cloud, Einstein AI and Tableau/CRM Analytics to enhance automation and decision-making, leveraging the entire Salesforce portfolio. With over 5,000 AI certifications, the company delivers scalable, industry-specific AI solutions, ensuring enterprises benefit from real-time customer intelligence, predictive analytics and workflow automation to drive operational efficiency and business growth.

Advanced enterprise integration: Cognizant’s MuleSoft expertise and multicloud integration capabilities enable seamless connectivity between Salesforce, ERP systems, legacy platforms and real-

time customer data ecosystems. As a 10X MuleSoft Innovation Partner Award winner, it combines Data Cloud with MuleSoft to provide scalable, AI-powered enterprise integrations, ensuring enhanced data visibility, automation and compliance.

Expansion and growth: Cognizant is scaling its UKI and EMEA capabilities, particularly in Germany, France and Spain, to drive localized Salesforce delivery. Its regional growth strategy includes investments in nearshore capabilities in Spain and Latin America to enhance data residency compliance and multiregion service scalability for enterprises in Germany.

Caution

Due to Cognizant’s extensive global Salesforce-certified workforce, there is an opportunity to strengthen its regional workforce presence further. Expanding localized expertise and delivery capabilities could enhance customer engagement and responsiveness to the specific needs of enterprises in Germany.





Implementation Services for Core Clouds and AI Agents – Midmarket

Who Should Read This Section

This report is valuable for service providers and midmarket enterprises offering implementation services for core clouds and AI agent in Germany to understand their market position and for midmarket enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers to enterprises, with a comprehensive overview of the market's competitive landscape and how each provider addresses key regional challenges.

Marketing and sales professionals

Should read this report to see how companies improve sales and marketing functions with Salesforce's experience, sales, service, commerce, marketing and data clouds.

Technology professionals

Should read this report to identify opportunities to leverage Salesforce's Data Cloud, Einstein GenAI and Agentforce to improve platform performance for sales and service agents.

Business professionals

Should read this report to identify use cases delivered using Salesforce's core clouds, Agentforce and their associated business benefits.

Procurement professionals

Should read this report to understand how Salesforce providers compare their strengths and the areas that still need improvement.



**Salesforce Ecosystem Partners
Implementation Services for Core Clouds and AI Agents – Midmarket**

Germany 2025



This quadrant evaluates providers' capabilities to **accelerate digital transformation** among midmarket businesses in Germany with **Salesforce's core clouds, Agentforce and Einstein AI** to drive automation and intelligent decision-making.

Roman Pelzel



Implementation Services for Core Clouds and AI Agents – Midmarket

Definition

This quadrant will assess providers specializing in Salesforce's core offerings — Sales Cloud, Service Cloud, Commerce Cloud and Experience Cloud. These products are considered as the foundation of Salesforce's cloud services. The quadrant will also assess proof-of-concept demonstrations of autonomous AI Agents, including Agentforce, alongside these Core Clouds.

Providers in this category use an agile approach, focusing on midsize or smaller clients. With minimal integration, projects are often completed in a few months.

Service providers in this quadrant mainly focus on process redesign using Salesforce applications. Implementation services include process consulting, custom solution design, system configuration, data cleanup, data migration and go-live support for a smooth launch.

This agile approach helps midmarket companies quickly leverage Salesforce, streamline operations and adapt to market changes for faster, improved outcomes.

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go-live support**) for Salesforce Core Clouds such as 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** such as Agentforce demonstration capabilities
5. Economic stability and significant **delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**



Implementation Services for Core Clouds and AI Agents – Midmarket

Observations

Midmarket businesses are rapidly adopting Salesforce solutions to improve operational efficiency and digital resilience, while integrating AI-driven automation and real-time insights. They are looking for partners to help them leverage the latest AI-empowered innovations from Salesforce.

A notable trend in this quadrant is the widespread adoption of prebuilt accelerators and industry-specific expertise, enabling faster time to value. Providers utilizing industry blueprints are experiencing increased demand, as midmarket clients prefer low-complexity, high-impact implementations. Additionally, Agile methodologies and low-code/no-code solutions are critical differentiators, allowing for quicker deployment with minimal customization overhead.

Leaders in this quadrant demonstrate compelling AI and Agentforce use cases, employing predictive analytics to enhance speed and efficiency. They excel in MuleSoft, API-based architectures and data synchronization, delivering seamless ERP,

BI and Data Cloud integrations. These providers often partner with global providers to enhance their service offerings.

Market Challengers in this quadrant may have strong Salesforce implementation experience but lack differentiation in AI capabilities or industry-focused expertise. Product Challengers tend to be innovative in specific areas but lack substantial local market reach. Contenders typically have solid Salesforce implementation capabilities but must expand their coverage of Salesforce Cloud solutions and improve their capabilities in areas such as AI enablement, prebuilt solutions and market presence.

Overall, the quadrant reflects a strong shift toward AI-enhanced acceleration, seamless third-party integrations and industry-specific customization.

From the 42 companies assessed for this study, 19 qualified for this quadrant, with 8 being Leaders and 1 Rising Star.

adesso

adesso empowers midmarket businesses with AI-enhanced Salesforce implementations. By integrating Agentforce and Einstein AI, the company automates sales, service and customer interactions, enabling smarter decision-making and operational efficiency at scale.



Deutsche Telekom delivers AI-powered Salesforce implementations with prebuilt industry templates and rapid deployment accelerators. Its expertise in ERP, BI and marketing integration ensures optimized sales and customer engagement for clients.

DIA

DIA combines AI-powered automation, real-time data insights and agile implementation strategies to optimize Salesforce solutions for midmarket clients. Its expertise in Agentforce and Tableau enhances customer engagement and drives intelligent decision-making.

DIGITALL

DIGITALL specializes in AI-enhanced Salesforce implementations, focusing on agile delivery, industry-specific customizations and seamless ecosystem integration. Its expertise in automation and data-driven insights enables businesses to optimize CRM and customer engagement.

dotSource

dotSource drives Salesforce transformations with Quick Start Commerce solutions, AI-driven analytics and seamless ERP integration. Its industry-specific road maps and scalable CRM strategies help businesses optimize customer engagement and drive digital growth.

Eigenherd

Eigenherd accelerates Salesforce transformation with AI-driven automation, hybrid cloud solutions and industry-specific accelerators. Its expertise in Net Zero Cloud and ESG-driven digitalization makes it a strategic partner for sustainable and future-ready implementations.



Implementation Services for Core Clouds and AI Agents – Midmarket

factory42

factory42 is a trusted Salesforce partner for midmarket businesses, offering AI-driven automation, Agentforce integration and CRM optimization. Its structured learning, thought leadership initiatives and hands-on training ensure long-term success for midmarket clients.

Salesfive

Salesfive is an AI-powered Salesforce innovator. It leverages its AI Master Award-winning expertise to integrate Agentforce, intelligent workflows and predictive analytics. Its structured change management and user training ensure seamless implementation and adoption.

Cloudity

Cloudity (Rising Star) is a fast-growing Salesforce Partner, offering AI-driven solutions and structured digital transformations. Its expertise in Agentforce, Data Cloud and change management accelerates seamless adoption and delivery of high-impact CRM solutions.





Implementation Services for Marketing and Commerce with AI Enablement

Who Should Read This Section

This report is valuable for service providers offering implementation services for marketing and commerce with AI enablement in Germany to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers to enterprises, with a comprehensive overview of the market's competitive landscape and how each provider addresses key regional challenges.

Marketing and sales professionals

Should read this report to see how providers use AI to identify the next best action, generate content and personalize experiences across marketing and commerce channels.

Data management professionals

Should read this report to check how Salesforce Data Cloud is deployed to converge data from Salesforce products and other sources to enable a unified marketing data model.

Business professionals

Should read this report to observe how AI enablement is infused in salesforce marketing and commerce solutions to drive operational efficiency and business value creation.

Procurement professionals

Should read this report to understand how Salesforce providers compare their strengths and the areas that still need improvement.



**Salesforce Ecosystem Partners
Implementation Services for Marketing and Commerce with AI Enablement**

Germany 2025



Providers assessed in this quadrant enable enterprises to drive **data-driven marketing** and **commerce automation** by **integrating AI, cross-cloud orchestration** and **real-time analytics** to deliver hyperpersonalized, scalable CX.

Roman Pelzel



Implementation Services for Marketing and Commerce with AI Enablement

Definition

This quadrant examines providers specializing in Salesforce Marketing and Commerce Cloud services. It focuses on implementation scenarios, including standalone projects and integration of Salesforce Marketing Cloud, Salesforce Commerce Cloud, Salesforce B2C Commerce Cloud, or commerce platforms from other vendors.

These implementations range from limited real-time integrations to complex projects such as using Salesforce Marketing Cloud for advanced e-commerce and omnichannel marketing. Real-time data access is key for decision-making, with AI and ML aiding in propensity scoring, decisioning, content generation and autonomous agents sourced from both Salesforce and third parties.

Providers offer services and solutions for integrated, personalized CX for marketing and commerce that boosts brand awareness, conversion and retention while automating processes for memorable customer interactions.

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go-live support**) for Data Cloud, Marketing Cloud, Commerce Cloud, B2C Commerce Cloud, Einstein, Einstein GenAI and Agentforce.
2. **Deep knowledge** of martech and commerce architectures and standard software packages other than Salesforce, along with the ability to implement **end-to-end processes** relevant to marketing and commerce.
3. Provision of **strategy advisory services** for marketing, commerce and CX.
4. Availability of **Predefined solutions** and accelerators, preferably both functionally oriented and industry-specific
5. Presence of unique differentiators related to **AI enablement** for marketing and commerce Compelling list of **use cases and references**



Implementation Services for Marketing and Commerce with AI Enablement

Observations

Marketing and commerce transformations reflect a rapidly evolving landscape, where AI-driven automation, predictive analytics and omnichannel strategies define market leadership. Implementations of Salesforce Marketing Cloud and Commerce Cloud are increasingly enhanced by AI-powered personalization engines, real-time data processing and cross-cloud orchestration, enabling hyperpersonalized CX.

The adoption of Salesforce Einstein AI and Agentforce has accelerated, enabling businesses to improve customer segmentation, automate content generation and drive transformative commerce initiatives. Leading providers excel in executing AI-driven campaigns, delivering omnichannel personalization and leveraging predictive analytics. However, challenges persist in demonstrating measurable ROI for AI investments, scaling implementations across multiple regions and addressing industry-specific compliance constraints. While

some providers emphasize global reach and scalability, others focus on localized AI solutions tailored to regional market needs.

Leaders in this quadrant effectively transform brands through deep AI integration, seamless cross-cloud execution and industry expertise, allowing enterprises to automate and scale marketing and commerce operations across diverse ecosystems.

Product Challengers in this quadrant offer specialized features or unique solutions but require broader local adoption and large-scale implementations to gain traction. Market Challengers possess solid capabilities and a favorable market position but must enhance their portfolios to stay relevant. Contenders are expanding their Salesforce capabilities yet need to further develop their capabilities and integration expertise to compete at higher levels.

From the 42 companies assessed for this study, 24 qualified for this quadrant, with 10 being Leaders and 1 Rising Star.

accenture

Accenture transforms brands through Accenture Song by utilizing AI-empowered Salesforce solutions to create seamless, hyperpersonalized marketing and commerce experiences. Its expertise in Data Cloud and cross-cloud integration accelerates scalable digital commerce.

adesso

adesso SE drives Salesforce-based CX innovation by leveraging AI, real-time data and omnichannel integration to personalize customer journeys. adesso's expertise in predictive analytics and strategic consulting helps businesses enhance brand loyalty and foster digital growth.

Capgemini

Capgemini delivers industry-tailored Salesforce solutions that leverage AI-powered segmentation, real-time A/B testing and predictive analytics. The company's data-driven commerce and CX innovations help brands personalize customer journeys and optimize business outcomes.

cognizant

Cognizant facilitates seamless omnichannel engagement through the integration of Einstein AI, Data Cloud and automation. The company's industry-specific accelerators and multicloud integration enhance personalization, improve conversion rates and accelerate growth for enterprises.



Implementation Services for Marketing and Commerce with AI Enablement

Deloitte.

Deloitte powers Salesforce-driven CX innovation with AI automation, real-time data intelligence and hyperpersonalization. Its predictive analytics and cross-cloud orchestration enable brands to optimize digital marketing and commerce experiences at scale.



Deutsche Telekom leverages Salesforce AI, Data Cloud and automation to streamline omnichannel marketing and e-commerce. Its seamless integration with ERP, CRM and payment platforms enables businesses to optimize digital commerce and maximize customer conversions.

DIGITALL

DIGITALL combines AI, ML and Salesforce multicloud expertise to drive intelligent marketing and commerce automation. Its predictive insights and real-time analytics help businesses enhance CX, streamline decision-making and optimize customer journeys.



Infosys powers AI-led marketing and commerce with Aster™, unifying Salesforce's ecosystem to enable hyperpersonalized campaigns, predictive analytics and experience-driven automation that maximizes engagement and digital commerce outcomes for enterprises in Germany.



Reply transforms B2B and B2C commerce with Salesforce cloud solutions, enabling seamless order management, AI-driven inventory synchronization and omnichannel shopping experiences. Its industry-specialized solutions optimize CX and support real-time customer decision-making.

Salesfive

Salesfive accelerates AI-driven marketing and commerce with Salesforce, utilizing its fluent:cx subsidiary and AI Master Award-winning expertise. Its automation, predictive analytics and omnichannel strategies enable intelligent customer engagement and drive business growth.



Wipro (Rising Star) drives AI-powered marketing and commerce transformation with Salesforce by integrating Einstein AI, Agentforce and Data Cloud. Its prebuilt accelerators and real-time analytics enable hyperpersonalized customer engagement and omnichannel automation.



Cognizant



“Cognizant is a strategic partner for Salesforce-driven CX transformations in Germany. It combines advanced AI, deep industry expertise and strategic partnerships to enable enterprises to achieve personalized, data-driven CX at scale.”

Roman Pelzel

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 336,800 employees across over 50 countries. In FY24, the company generated \$19.7 billion in revenue, with Health Sciences as its largest segment. In Germany, Cognizant’s AI-driven personalization, seamless multicloud integration and industry-specific CX solutions position it as a leading partner for AI-powered marketing and commerce transformations. Its expertise in Salesforce Data Cloud, Agentforce and Einstein AI ensures enterprises achieve scalable, automated and customer-centric digital experiences that drive measurable business outcomes with enhanced CX in Germany.

Strengths

AI-powered customer engagement:

Cognizant leverages Einstein AI, Data Cloud and Agentforce to enable real-time personalization, predictive analytics and AI-driven marketing automation. Integrating AI-powered insights into Salesforce Marketing Cloud and Commerce Cloud, Cognizant helps enterprises optimize customer journeys, boost conversions and enhance retention through hyperpersonalized campaigns and AI-driven content recommendations.

Scalable multicloud solutions for seamless CX:

Cognizant combines Marketing Cloud, Commerce Cloud, MuleSoft and Data Cloud to deliver end-to-end, AI-driven customer engagement solutions. Its expertise in integrating real-time customer data across

multiple platforms enables enterprises to deliver consistent, omnichannel experiences across web, mobile and social channels.

Industry-specific AI solutions for intelligent commerce:

Cognizant provides tailored AI-powered marketing and commerce solutions for financial services, retail, healthcare and telecom enterprises. Its industry-specific accelerators and automation frameworks enable organizations to streamline commerce operations and optimize digital customer interactions. Cognizant maximizes customer lifetime value by leveraging Salesforce loyalty management, AI-driven pricing optimization and intelligent customer segmentation.

Caution

Cognizant could elevate its market positioning by showcasing a Salesforce-powered brand evolution using Salesforce solutions. This approach could reinforce its leadership, strengthen client trust and set a new benchmark in digital reinvention. Sharing more local references would further help attract new clients.





Managed Application Services – Large Enterprises

Who Should Read This Section

This report is valuable for service providers offering managed application services in Germany to understand their market position and for large enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers to enterprises, with a comprehensive overview of the market's competitive landscape and how each provider addresses key regional challenges.

Marketing and sales leaders

Should read this report to analyze service partners' capabilities in administration assistance, accelerators, proactive monitoring and advisory services.

Field service managers

Should read this report to understand how service providers implement and expand the Salesforce Service Cloud to better manage field service operations.

IT and technology leaders

Should read this report to better understand managed service providers' capabilities and compare their technical expertise in remote and onsite monitoring.

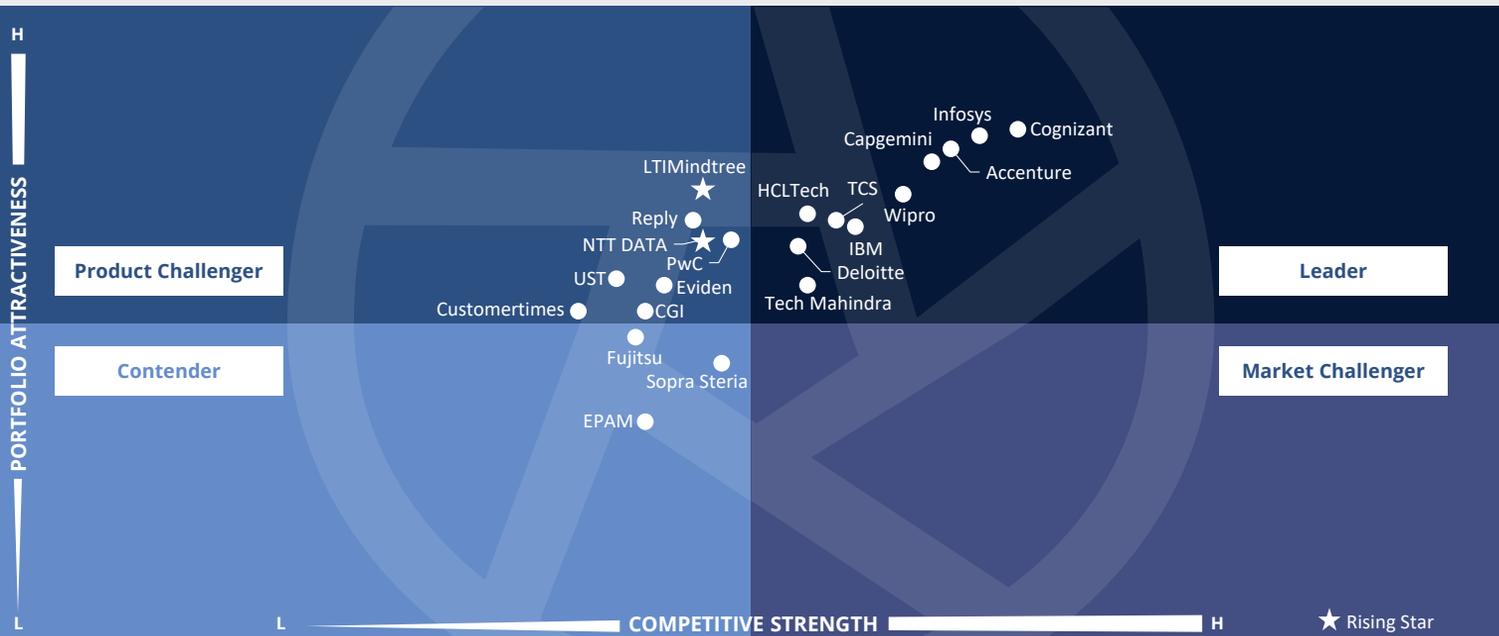
Security and data professionals

Should read this report to understand how providers adhere to German security laws for Salesforce integration and compare practices for better understanding.



Salesforce Ecosystem Partners
Managed Application Services – Large Enterprises

Germany 2025



Providers in this quadrant **manage and optimize** complex Salesforce environments, leveraging **AI-driven automation, compliance frameworks** and **multicloud expertise**. Their focus on scalability, efficiency and innovation ensures seamless operations.

Roman Pelzel



Managed Application Services – Large Enterprises

Definition

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

For large enterprise clients, managed services extend to address global reach and the complexity of application landscapes, often characterized by solutions from various software providers, necessitating centralized management and support.

This quadrant emphasizes ongoing improvements and innovations in solutions to enhance business value for enterprises. Managed services involve transferring key responsibilities to the provider under strictly defined SLAs.

Providers in this quadrant are crucial to large enterprises' Salesforce operations, ensuring smooth maintenance of core functions and driving business value. They also safeguard data integrity, security and regulatory compliance across complex, global operations.

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**



Managed Application Services – Large Enterprises

Observations

Enterprises are increasingly seeking scalable, AI-enabled service models to optimize operational efficiency while ensuring data security and regulatory adherence. Providers in this quadrant differentiate themselves through predictive automation, proactive monitoring and outcome-based managed services that support Salesforce environments across complex, global IT landscapes.

A key trend is the widespread adoption of AI-driven service automation. Providers are integrating Salesforce Einstein AI, GenAI and Agentforce into their managed services to enable self-healing IT infrastructures and predictive incident resolution, which facilitate cost-efficient operations. Comprehensive multicloud capabilities are essential for providers, as enterprises demand seamless interoperability across Salesforce, AWS, Google Cloud and Azure ecosystems.

Leaders exhibit enterprise-scale automation, robust governance frameworks and AI-driven predictive service management. They effectively combine global reach with localized

compliance capabilities and offer end-to-end support for the Salesforce ecosystem, employing outcome-based pricing models.

Product Challengers consist of experienced MSPs with strong AI-driven automation, compliance frameworks and specialized solutions. However, their local market presence may not be as strong, potentially limiting their ability to scale regionally. To progress, they must enhance their local footprint. Contenders are recognized players in the market, bringing niche expertise and proprietary tools. Although they may lack the global scale and full-stack capabilities of Leaders, they hold strategic advantages in specific industries or service areas. To advance, they must strengthen their local presence and broaden their service portfolio.

From the 42 companies assessed for this study, 21 qualified for this quadrant, with 10 being Leaders and 2 Rising Star.

accenture

Accenture combines enterprise-scale automation, AI-driven compliance and predictive maintenance to enhance Salesforce managed service offerings. The company's deep industry expertise and regulatory frameworks ensure efficient, scalable and resilient digital transformation.

Capgemini

Capgemini's Salesforce managed services integrate predictive automation, DevOps-driven enhancements and energy-efficient cloud operations. The company's Rightshore® model ensures around-the-clock support, seamless compliance and cost-optimized scalability for global enterprises.

cognizant

Cognizant transforms Salesforce operations with AI-powered automation, real-time analytics and cloud-native governance. Its expertise in predictive service management and regulatory compliance ensures seamless, scalable and secure managed services for large enterprises.

Deloitte.

Deloitte enhances Salesforce application management with AI-driven service automation, real-time compliance enforcement and intelligent workflow orchestration. Its hybrid Application Management approach ensures scalable, secure and future-ready enterprise operations.

HCLTech

HCLTech delivers AI-powered Salesforce managed services leveraging its ASM 2.0 framework, enabling self-healing automation, predictive monitoring and cross-cloud optimization. Its global delivery model ensures operational resilience and business agility.

IBM.

IBM optimizes Salesforce managed services with AI-led governance, real-time security automation and cross-cloud DevOps frameworks. The company's enterprise-grade compliance and around-the-clock service operations ensure resilient, future-ready Salesforce ecosystems for clients.



Managed Application Services – Large Enterprises



Infosys offers Salesforce managed services, with predictive automation, AI-powered IT resilience and proactive service management. Its LEAP Assistant and CX AI Suite drive efficiency, ensuring enterprises in Germany achieve uninterrupted and optimized Salesforce operations.



TCS enhances Salesforce managed services by leveraging GenAI-powered automation, autonomous agents and AI-driven test case generation. The company's predictive issue resolution and process automation optimize governance, accelerate deployment and drive operational efficiency.



Tech Mahindra enhances its Salesforce managed service offering with AI-enhanced automation, flexible SLA models and localized support. Predictive analytics and proactive governance ensure uninterrupted service, compliance alignment and digital resilience for clients in Germany.



Wipro delivers AI-powered Salesforce managed services through its NextGen Thrive framework, integrating proactive automation, compliance governance and flexible engagement models. Its Cloud Management Center accelerates the deployment of agile and high-performing Salesforce ecosystems.



LTIMindtree (Rising Star) offers AI-powered Salesforce managed services with automation-driven workflows, real-time ticket resolution and predictive system insights. Its consulting-led approach ensures seamless cloud integration and scalable enterprise operations.



NTT Data (Rising Star) delivers AI-powered Salesforce managed services with predictive automation, MuleSoft expertise and around-the-clock global support. Its localized service model ensures regional compliance and operational resilience for enterprise-wide Salesforce ecosystems.





“With AI-powered Salesforce managed services, including proactive monitoring, compliance-driven frameworks and multicloud scalability, Cognizant enables enterprises to achieve long-term operational efficiency, cost optimization and continuous innovation.”

Roman Pelzel

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 336,800 employees across over 50 countries. In FY24, the company generated \$19.7 billion in revenue, with Health Sciences as its largest segment. Cognizant is a global leader in AI-powered Salesforce managed application services, offering proactive system monitoring, AI-driven automation and industry-specific optimizations. With its strong focus on predictive analytics, security compliance and DevOps-driven service delivery, Cognizant enables businesses in Germany to achieve operational excellence, cost efficiency and digital transformation while driving continuous innovation.

Strengths

AI-driven Salesforce application services:

Cognizant leverages Einstein AI, Data Cloud and Agentforce to enable predictive monitoring, AI-driven incident resolution and self-healing workflows within Salesforce environments. By automating system diagnostics and performance tuning, Cognizant reduces manual intervention, accelerates service recovery and optimizes system uptime. Its automation-first approach ensures enterprises benefit from real-time issue detection and AI-led remediation.

Scalable multicloud application management:

Cognizant provides end-to-end managed services across Sales Cloud, Service Cloud, Marketing Cloud, Revenue Cloud and industry clouds, ensuring seamless multicloud operations

for enterprises. The company's expertise in cross-platform integrations with MuleSoft, SAP and Microsoft Dynamics enables real-time insights across various ecosystems.

Industry-specific managed services with continuous innovation:

Cognizant tailors its Salesforce managed services, ensuring industry-specific compliance, risk mitigation and optimized workflows. With around-the-clock monitoring, DevOps-driven release management and automated testing frameworks, the company enables enterprises to scale Salesforce applications efficiently. Proprietary AI-driven platforms such as Neuro IT Operations further enhance system analytics and facilitate proactive issue resolution.

Caution

Cognizant excels in large-scale services. However, it should focus on midmarket firms that seek cost-efficient, scalable and automation-driven application management and often lack in-house expertise. By becoming a trusted midmarket partner in Germany, Cognizant could capture new growth opportunities.





Managed Application Services – Midmarket

Who Should Read This Section

This report is valuable for service providers offering managed application services in Germany to understand their market position and for midmarket enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers to enterprises, with a comprehensive overview of the market's competitive landscape and how each provider addresses key regional challenges.

Marketing and sales leaders

Should read this report to analyze and highlight service providers' capabilities in implementing Salesforce managed application services.

Field service managers

Should read this report to understand how service providers implement and expand 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 adhere to German security laws for Salesforce integration and compare practices for better understanding.



**Salesforce Ecosystem Partners
Managed Application Services – Midmarket**

Germany 2025



This quadrant assesses providers delivering **end-to-end Salesforce managed services** for midmarket businesses. They are **regional experts** and offer **modular service delivery** with proactive problem-solving, **AI-driven automation** and compliance frameworks.

Roman Pelzel



Managed Application Services – Midmarket

Definition

This quadrant focus on providers' proficiency in offering managed services that include vital maintenance and support functions, such as monitoring, remote support, centralized Salesforce administration, data quality management, and data security and compliance adherence.

Midmarket clients often have more modest integration requirements and operate within a specific region. They demand strong regional support, which providers in this quadrant are well-equipped to deliver.

A key aspect within this quadrant is the ongoing commitment to enhance solutions. Providers constantly strive to improve and innovate their services, generating additional value for clients. The ability for ongoing refinement and adaptation is pivotal in a rapidly evolving business landscape.

Managed services involve the transfer of key responsibilities to a dedicated service provider, operating within a well-defined SLA network to ensure consistent delivery of client expectations.

Providers in this quadrant offer regional focus and tailored support, as well as address Salesforce applications, data quality and compliance requirements for midmarket clients.

Eligibility Criteria

1. Well-proven experience in **operational support for application landscapes** with a 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**



Managed Application Services – Midmarket

Observations

This quadrant represents a rapidly maturing landscape where regional support, automation-driven efficiencies and compliance adherence differentiate providers. Midmarket businesses are increasingly seeking proactive, AI-driven managed services to optimize their Salesforce environments, reduce operational risks and enhance user adoption. Providers in this quadrant emphasize localized expertise to ensure local compliance, while also integrating AI automation, predictive analytics and modular service packages to address evolving client needs.

Many providers now offer modular, outcome-based pricing structures, allowing midmarket clients to select tailored support levels. This flexibility is particularly relevant for businesses striving to balance cost control with long-term scalability. Additionally, automation-powered service management is becoming a critical factor, as AI-driven monitoring and proactive issue resolution help reduce downtime and optimize system performance.

Leaders in this quadrant serve as strategic partners, demonstrating comprehensive Salesforce MSP capabilities, structured service portfolios and scalable delivery models. They possess strong capabilities in AI integration, regional market presence and service quality. Product Challengers offer innovative, high-value services but must expand their regional footprint and improve client engagement to compete effectively. Contenders hold niche strengths, often excelling in specialized industry solutions, training programs or proprietary accelerators; however, they need to broaden their service portfolios and strengthen their market positioning to advance within the quadrant.

The providers in this quadrant are recognized for their midmarket services while also frequently serving larger enterprises or partnering with larger MSPs and global GSIs.

From the 42 companies assessed for this study, 17 qualified for this quadrant, with 6 being Leaders.

adesso

adesso SE delivers AI-driven Salesforce managed services, featuring proactive system optimization, SmartShore delivery and structured service packages. Its cost-effective, scalable delivery model ensures seamless around-the-clock support, enhancing clients' operational and digital resilience.



Deutsche Telekom delivers secure, AI-powered Salesforce managed services while prioritizing European data sovereignty. Its industry-specific templates, automation frameworks and structured service models ensure compliance, scalability and seamless operations for clients.

DIA

DIA combines AI-powered automation, real-time monitoring and expert advisory services to deliver future-proof Salesforce managed services. With accelerator-driven solutions and extensive regional expertise in DACH, it ensures seamless system integration and long-term optimization.

DIGITALL

DIGITALL provides scalable, AI-powered Salesforce managed services, focusing on compliance-driven automation and proactive monitoring. With strong industry expertise and a high customer satisfaction rating, it ensures long-term business value and system reliability.

factory42

factory42 delivers tailored Salesforce managed services with structured, flexible support packages. Its strong regional expertise, proactive monitoring and outcome-driven pricing ensure optimized, scalable and cost-effective Salesforce operations for midmarket clients.

Salesfive

Salesfive blends regional strength with AI-powered Salesforce service management, ensuring seamless system maintenance and operational efficiency. The company's flexible, tailored support packages and compliance-driven governance make it a trusted partner in Germany.





Implementation Services for Industry Clouds

Who Should Read This Section

This report is valuable for service providers offering implementation services for industry clouds in Germany to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers to enterprises, with a comprehensive overview of the market's competitive landscape and how each provider addresses key regional challenges.

Technology professionals

Managing platforms supporting vertical-specific processes should read this report to see how Salesforce industry clouds deliver out-of-the-box frameworks and integrations.

Digital professionals

Tasked with furthering digital transformation within the enterprise should read this report to understand the trade-offs between customizing multicloud and moving to industry clouds.

Business professionals

Should read this report to identify how Salesforce providers implementing industry cloud unlock efficiencies and greater business value.

Procurement professionals

Should read this report to understand how Salesforce providers compare their strengths and the areas that still need improvement.



**Salesforce Ecosystem Partners
Implementation Services for Industry Clouds**

Germany 2025



Providers evaluated in this quadrant specialize in **implementing Salesforce industry cloud solutions**. They leverage **sector-specific expertise, AI-powered automation and compliance-ready integrations** to accelerate digital industry transformation.

Roman Pelzel



Implementation Services for Industry Clouds

Definition

This quadrant will assess providers offering implementation services tailored to Salesforce's industry cloud products such as Financial Services Cloud and Health Cloud, which require specialized skills and accelerators for successful implementation. Providers must have an in-depth understanding of industry nuances.

Another key aspect is the ability to integrate Salesforce products to create holistic solutions tailored to clients' needs. Salesforce's focus on increased verticalization highlights the importance of these capabilities in new implementations.

Implementation services include process consulting for workflow optimization, custom solution design, system configuration, data cleanup, data migration and go-live support for specialized industry cloud solutions.

Providers in this quadrant are crucial for businesses leveraging Salesforce's industry cloud products. Their expertise in integrating multiple Salesforce offerings enables organizations to address sector-specific challenges efficiently and gain a competitive edge.

Eligibility Criteria

1. Well-proven **domain expertise** for respective industries
2. Strong implementation capabilities (**consulting, configuration, data migration and go-live support**) for the Salesforce industry cloud products
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**



Implementation Services for Industry Clouds

Observations

Salesforce's industry cloud solutions are gaining momentum, supported by AI-powered automation, data-driven decision-making and regulatory requirements. Enterprises are increasingly seeking specialized providers capable of delivering tailored, industry-specific Salesforce implementations that integrate seamlessly with their ecosystems.

Leading providers utilize predictive analytics, ML and AI-enhanced industry workflows to enhance regulatory compliance, process efficiency and customer engagement. The adoption of Data Cloud and Agentforce for real-time insights, intelligent process automation and personalized experiences has further accelerated this trend.

The market is highly competitive, with global providers gaining an edge through scalable delivery models, strategic ISV partnerships, and prebuilt accelerators that streamline implementation and enhance time to value. Meanwhile, regional players are strengthening their market presence by focusing on localized compliance expertise, onshore support and deep industry-specific knowledge.

Leaders in this quadrant offer end-to-end implementation services, industry-aligned accelerators, compliance-ready Salesforce solutions and comprehensive OCM capabilities. Product Challengers deliver technologically advanced solutions but require a stronger regional presence to effectively compete with Leaders. While they offer niche strengths and proprietary accelerators, Contenders must focus on broadening their delivery capabilities and improving their industry-specific certifications to gain competitive advantages. As Salesforce continues to expand its vertical cloud strategy, providers must stay current with their expertise to maintain a competitive edge.

From the 42 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and 1 Rising Star.

accenture

Accenture drives AI-powered industry cloud transformation, delivering hyperpersonalized CX, real-time analytics and automation for various industries. Its co-innovation hubs and prebuilt accelerators facilitate fast and scalable Salesforce deployments.

adesso

adesso SE enables businesses to confidently navigate complex industry challenges by combining deep domain expertise, Salesforce industry cloud capabilities, regional knowledge and scalable automation to enhance customer engagement and operational efficiency.

Capgemini

Capgemini drives innovation in various industries with AI-powered Salesforce solutions that integrate Agentforce automation, real-time analytics and IoT-powered sustainability frameworks to future-proof enterprise operations and deliver hyperpersonalized experiences.

cognizant

Cognizant drives Salesforce transformation at scale by combining cloud-native innovation, AI-powered workflows and extensive ISV partnerships to help enterprises modernize their Salesforce ecosystems with agility and compliance.

Deloitte.

Deloitte's global Salesforce expertise and industry-specific accelerators enable enterprises to modernize digital operations, leveraging real-time compliance tracking, AI-driven automation and scalable cloud solutions, especially tailored for highly regulated industries.

T

Deutsche Telekom is a pillar of digitalization in Germany, enhancing energy grid automation, real estate operations and manufacturing supply chains with its regulatory-compliant Salesforce solutions, underpinned by its secure cloud ecosystem capabilities.

HCLTech

HCLTech enhances Salesforce industry clouds by utilizing its AI-empowered InFusion Solution Suite, optimizing financial risk management, healthcare compliance and energy industry automation through predictive analytics, workflow automation and seamless data integration.



Implementation Services for Industry Clouds



IBM's Salesforce industry clouds leverage AI-powered automation by integrating Hyperforce for secure cloud deployments, watsonx AI for predictive analytics, Agentforce for AI-driven CX and over 150 industry accelerators tailored for real-time applications in Germany.



Infosys delivers end-to-end Salesforce industry clouds transformations, integrating prebuilt accelerators, MuleSoft-driven innovation and AI-powered automation to help enterprises streamline workflows, improve compliance and enhance customer engagement.



Wipro delivers end-to-end Salesforce industry clouds by leveraging AI-driven industry accelerators, while integrating API-driven architectures for seamless connectivity within ecosystems, enhanced predictive analytics, compliance automation and customer engagement.



Tech Mahindra (Rising Star) combines AI-driven industry accelerators like Auto.CX.NxT for the automotive industry with ERP connectivity, MuleSoft integrations and predictive analytics to accelerate Salesforce industry clouds deployments within enterprise ecosystems.



Cognizant



“With AI-driven automation, deep industry expertise and cloud-native innovations, Cognizant empowers enterprises in Germany to modernize their Salesforce environments while ensuring operational resilience, compliance and customer-centric transformation.”

Roman Pelzel

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 336,800 employees across over 50 countries. In FY24, the company generated \$19.7 billion in revenue, with Health Sciences as its largest segment. The company is a leading provider of AI-driven multicloud Salesforce solutions, delivering digital transformations for enterprises across sectors in Germany. By leveraging predictive analytics, AI-powered automation and industry-specific Salesforce innovations, Cognizant enables enterprises to enhance operational efficiency, optimize customer engagement and meet industry-specific regulatory compliance while driving sustainable growth.

Strengths

AI-driven industry solutions: Cognizant’s industry-specific accelerators and AI-driven solutions position it as a leader in enterprise automation and digital transformation across healthcare, banking, telecommunications, insurance and retail sectors. Cognizant helps enterprises streamline operations, enhance CX and drive long-term business success by leveraging predictive analytics, AI-powered automation and industry-specific Salesforce innovations, including sustainability.

Expansive ISV partner ecosystem: Cognizant has one of the largest ISV partner ecosystems, collaborating with DocuSign, Celonis, Avalara, UiPath, Conga and more to deliver industry-specific solutions and accelerators. With over 20 strategic partnerships and more than 150 accelerators

built on the Salesforce platform, Cognizant enhances enterprise agility, automation and compliance.

Culture of continuous innovation: Cognizant fosters a culture of AI-driven innovation through Salesforce Techathons, IDEAthons and GenAI Studios. With over 75,000 innovation ideas generated, Cognizant accelerates industry-specific problem-solving, coinnovation and Salesforce ecosystem advancements. As a member of seven Salesforce Partner Advisory Boards, Cognizant plays a key role in shaping the future of Salesforce innovations, ensuring cutting-edge solutions tailored to industry needs.

Caution

Cognizant excels in driving Salesforce industry clouds transformations for enterprises in Germany. By expanding its focus more on midmarket enterprises, the company could unlock new growth potential. Showcasing its local success stories, especially in Germany’s key industries, would further strengthen Cognizant’s position as a trusted advisor.





Appendix

The ISG Provider Lens 2025 – Salesforce Ecosystem Partners research study analyzes the relevant software vendors/service providers in the German market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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 & Editor Biographies



Lead Analyst

Roman Pelzel
Assistant Director & Principal Analyst

Roman Pelzel is a thought leader and trusted advisor with 30 years of experience leading and facilitating outcome-centric digital work and workplace strategies and technology transformations across different industries, including cloud adoption and ITIL-based service management.

As a Principal Analyst and Advisor at ISG, he is dedicated to transforming digital work in the DACH region. He frequently speaks on human-centric digital work, employee experience and digital experience management.

He is presently contributing as a Lead Analyst and Author with the ISG Provider Lens for Salesforce Ecosystem, Oracle Ecosystem and Future of Work.



Enterprise Context and Global Overview Analyst

Ayushi Gupta
Senior Research Analyst

Ayushi is a Senior Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Salesforce Ecosystem and the Future of Work. She supports the lead analysts in the research process and authors the Enterprise Context, the Global Summary report, focal points and quadrants reports. Ayushi has around 4 years of experience conducting in-depth competitive research across various business verticals. She has also been responsible for collating and analyzing secondary data to provide insights into ongoing trends, defining the

business landscape and evolving needs of the potential target audience. She is good at collaborating seamlessly with stakeholders and external clients, ensuring timely delivery of reports. Her areas of expertise lie across various industry verticals: IT services, Health, Higher Education, Infrastructure, Power & utility, and Finance. She is skilled in market research, visualization, storyboarding, and analysis.



Study Sponsor



Aman Munglani
Director: Hyperscalers, Digital Innovator Series
and Custom Research

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies. In his tenure exceeding

twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.

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™

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***ISG**

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





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