

Salesforce Ecosystem Partners

A research report comparing strengths
and advantages of Salesforce partners

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Salesforce powers AI-driven acceleration of omnichannel customer engagement to automate and innovate

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 2025, driven primarily by its robust subscription and support services. Key product segments, including its core CRM offerings and emerging cloud innovations, have contributed to these solid financial results, supported by improved operating cash flow and margins.

However, recent market sentiment has been mixed. Despite Salesforce's leadership in CRM and ongoing investments in innovation, the momentum of the share price — boosted by the announcement of Agentforce — has cooled off. This slowdown is partly due to a modest contribution from the new Agentforce platform and a weak short-term outlook.

This situation underscores an overarching narrative — while Salesforce is pioneering a digital labour revolution through autonomous AI agents, the tangible impact of these innovations is still developing.

The CRM and customer engagement landscape is experiencing significant transformation as success is no longer defined solely by the ability to capture and store structured data. It now requires seamless integration of diverse data sources, both structured and unstructured, to form a comprehensive 360-degree view of the customer. Recent advancements in data management have expanded traditional CRM boundaries, incorporating unstructured inputs such as social media content, emails and multimedia that once resided in isolated silos. This breakthrough enriches customer insights, fuels advanced analytics and underpins the deployment of autonomous, AI-driven services.

As organisations enter the age of agentic and AI-accelerated services, data integration emerges as a critical determinant of success. Besides implementing Salesforce, businesses must leverage integrated data to drive intelligent automation, deliver personalised

From structured data to **intelligent decisions**, AI-driven Salesforce integration **unlocks growth.**



experiences and streamline operations. In this new era, synthesising disparate data points into actionable intelligence will define which companies thrive, transforming CRM implementations and the overall business landscape.

Salesforce's competitive edge in UK

The UK CRM market is highly competitive, but Salesforce holds a leadership position with a significant edge in ecosystem and innovation, claiming to be the #1 CRM provider in the region. This dominance means that many FTSE 100 and major British enterprises rely on Salesforce to drive their sales, service and marketing operations. Key competitors in the region include Microsoft Dynamics 365, Oracle (Fusion/Siebel CRM), SAP Customer Experience (SAP CX) and emerging players such as HubSpot.

- **Microsoft Dynamics 365:** Microsoft is Salesforce's closest rival in many UK accounts, especially those already invested in its broader software stack. Dynamics 365's value proposition often lies in integrating Microsoft Office, Azure and Teams —

appealing to companies standardising on Microsoft. However, Salesforce's unique value comes from its focus on CRM and CX excellence. It offers enhanced depth in CRM functionalities and a vast AppExchange ecosystem of third-party solutions, which often means Salesforce can be tailored more precisely to business needs. Salesforce's momentum in AI with Einstein and Agentforce is viewed as a step ahead of Microsoft's CRM-specific AI. However, Microsoft is making strong efforts with its *Copilot* AI in Dynamics and Office. In the UK, where many businesses are adopting cloud technology, Salesforce's long-established multitenant cloud model and reputation for innovation make it a preferred choice over Dynamics for large-scale, customer-centric transformations.

- **SAP CX and Oracle CRM:** These legacy enterprise software solutions are part of the UK's IT landscape, particularly in specific verticals. UK subsidiaries of global manufacturing or utilities firms that use SAP ERP might choose SAP CX, which includes former Hybris commerce and

Cloud for Customer CRM. However, its market share is much smaller than that of Salesforce. Oracle's historic Siebel CRM has a footprint in some financial institutions and public sector agencies, though it has shifted focus to the Fusion CRM cloud. Salesforce differentiates itself by offering a modern, user-friendly interface and faster innovation cycles (three major releases per year). Companies in the UK often cite user adoption and agility as reasons for preferring Salesforce over the comparatively rigid SAP or Oracle systems. Salesforce's extensive partner network with global consultancies, such as Accenture, Deloitte and PwC, and local specialists enable successful deployments. In contrast, finding resources for outdated CRM systems can be challenging.

- **Midmarket and niche competitors:** In the UK's midmarket segment, solutions such as HubSpot CRM, Zoho or SugarCRM compete for small businesses or those with more straightforward needs. HubSpot, for example, has gained popularity for its ease of use and marketing integration, but it generally

serves as a stepping stone as many scaling businesses eventually migrate to Salesforce for its robustness and scalability. Salesforce has recognised this and offers essentials, SMB packages and a starter bundle to capture growing companies early. Industry-specific CRMs or customer platforms (such as wealth management platforms in finance or patient management systems in healthcare) sometimes compete indirectly. Salesforce's strategy to address this is its Customer 360 platform approach — which spans various functions, including sales, service, marketing and e-commerce. This unified approach is a compelling proposition for businesses aiming for a single source of truth for customer data.

Salesforce's local commitments and innovations amplify its unique value proposition in the region. It emphasises trust and compliance, which resonates with the data protection laws (the UK GDPR) and rigorous security standards demanded by sectors such as finance.

Salesforce's multiyear UK investment plan involves localising products (e.g., supporting UK-specific payment systems in Commerce



Cloud or HMRC integrations), growing local data centre capacity and expanding support teams. This regional focus, combined with its global presence, positions Salesforce as a vendor that can meet companies' reliability and advanced capabilities needs.

In the UK, Salesforce is more than a software provider; it is a strategic partner that drives business innovation. This advantage gives it a competitive edge over companies lacking the same level of engagement or broad offerings.

Vertical-specific trends in the UK

Salesforce usage in the UK spans virtually all sectors, each with its trends, adoption patterns and challenges. A few key vertical-specific trends stand out:

- **Financial services:** The UK, particularly London, is a global financial hub. Banks, insurance companies and fintech startups have widely adopted Salesforce to manage client relationships, regulatory compliance and omnichannel customer service. The Financial Services Cloud (FSC) has also gained traction as it caters to

wealth management, retail banking and insurance use cases. For instance, FSC enables a holistic view of a customer's financial holdings and automates mortgage application workflows. A notable trend is integrating Salesforce with core banking systems to provide front-office advisors with a unified view of customer data. In the UK, partners often build bespoke integrations due to strict data handling rules in the finance sector. Regulatory compliance is a significant factor as financial institutions in the UK must adhere to the Financial Conduct Authority (FCA) regulations regarding data protection, record-keeping and operational resilience. Salesforce's strong security measures, coupled with the availability of onshore UK data centres and Hyperforce on UK cloud infrastructure, help reassure this sector. Another trend is using Salesforce to support ESG and sustainability reporting, which financial companies are increasingly tasked with. Salesforce's analytics can help track and report these metrics effectively.

- **Retail and consumer goods:** The UK retail sector, including e-commerce, uses Salesforce Commerce Cloud and Marketing Cloud to create personalised shopping experiences and customer loyalty programs. With consumers expecting seamless digital interactions, retailers use Salesforce to connect online and in-store data. A trend here is the move towards omnichannel service — for instance, using Service Cloud to enable contact centre agents to handle queries about online orders, store inventory checks and returns in one console. Retailers in the region are also exploring *headless* architectures where Salesforce Commerce Cloud provides backend capabilities, while a custom front end delivers the shopping experience, allowing enhanced creative freedom in UX. Salesforce's acquisition of Mobify for headless commerce and integration of MuleSoft for connecting inventory systems play into this trend. Retailers in the region are also using AI (Einstein) for product recommendations

and CRM data to run highly targeted campaigns, reflecting a sector-wide push to use data analytics to drive sales.

- **Healthcare and life sciences:** The UK's healthcare sector, including the NHS and private providers, has traditionally been slower in adopting cloud CRM due to legacy systems and data sensitivity. However, there is a growing interest in Salesforce's Health Cloud and related solutions to improve patient engagement, particularly in private healthcare networks and pharma companies. A notable trend is patient-centric care coordination, utilising Salesforce to manage patient outreach, appointment scheduling and even vaccine rollouts. Salesforce was involved in several COVID-19 response solutions globally. Life sciences firms in the UK use Salesforce to manage clinical trial recruitment and drug marketing, leveraging the Salesforce platform's compliance with good practice (GxP) guidelines for software. Regulatory adherence, such as NHS data governance rules, is crucial. Consequently, Salesforce often must be configured for



UK-specific healthcare standards, including NHS number and GP practice integration. The introduction of agentic AI (Agentforce) is seen as potentially transformative, where AI agents could reduce the administrative workload of healthcare workers. This factor is essential as the UK healthcare system faces staffing challenges.

- **Public sector:** UK government departments and local councils have started to use Salesforce for citizen services, case management and even vaccine scheduling. For instance, the NHS Test and Trace program used Salesforce to manage COVID-19 tracing contacts. A notable trend in the public sector is the emphasis on *low-code solutions* to modernise legacy systems quickly. Salesforce's declarative development tools (Flow, Lightning App Builder) align well with this approach. However, adoption is tempered by procurement rules and the need for high security (official-sensitive level data). Salesforce has achieved various UK government security accreditations and is available via the G-Cloud procurement

framework, making it easier for agencies to adopt. Focus areas in government include digital permitting, grant management and constituent services — Salesforce's flexibility allows these diverse use cases to be on one platform. A key regulatory factor is data residency and sovereignty. Although the UK is outside the EU, the government still requires specific data (e.g., defence, sensitive personal data) to be stored locally. Salesforce's UK infrastructure and the Hyperforce EU/UK zones address this requirement, and the company's pledge to invest further in the UK likely includes expanding such capabilities.

- **Telecom and media:** UK telecom providers and media companies use Salesforce for customer support and sales, including managing mobile subscriber sign ups or advertising sales in media. An observed trend is using Salesforce Vlocity capabilities to handle telco-specific processes such as order provisioning and subscriber management. This strategy helps telecom providers modernise their CRM rapidly by using industry templates. Media companies

leverage Salesforce to get 360-degree views of subscribers or advertisers and drive personalised content offers via Marketing Cloud.

Across these verticals, a common theme is addressing *regulatory challenges and data protection*. Post-Brexit, the UK has maintained a domestic data protection framework (referred to as the UK GDPR) closely aligned with the EU GDPR. Compliance with privacy regulations is critical for all industries, especially those handling consumer data in the financial, retail and healthcare sectors. Salesforce provides tools for consent management, data masking and is aligning with the upcoming Data Protection Law (DPL) which is crucial for UK customers. Companies are also focusing on upcoming AI regulations or guidelines to ensure the responsible use of features such as Einstein GPT. Salesforce's push for *Trusted AI* and ethical guidelines aligns with this requirement.

Another market growth factor in the UK is the *focus on SMBs and startups*. The region has a vibrant startup scene, with London being a major tech hub in Europe. Many scale-ups

choose Salesforce early to ensure scalability. Salesforce's presence at community events, such as World Tour 2024 in London with over 12,000 attendees, indicates strong engagement beyond the enterprise segment. The Salesforce economy in the UK also benefits from a growing talent pool, which includes a base of Salesforce-certified professionals and a culture of continuous learning supported by Trailhead and local user groups. This ecosystem encourages further adoption because companies know they can hire or contract the skills needed.

In terms of adoption patterns, firms in the UK often start with a specific Salesforce product to solve a pressing problem. For example, a single division might roll out Sales Cloud to replace spreadsheets, or a marketing team might adopt Marketing Cloud for email campaigns. Success in one area then leads to multicloud expansion. The *land and expand* pattern is facilitated by Salesforce's modular licensing. As a result, many UK customers now use several Salesforce cloud products together. An insurance company, for instance, might use Sales Cloud for its brokers, Service Cloud for policyholder support and Experience Cloud



to run an agent portal. The more Salesforce becomes embedded across departments, the more strategic it becomes, leading to long-term growth in the account and for business.

To sum up, sector-specific needs and trends significantly shape Salesforce's usage in the UK. Salesforce has adeptly introduced industry-specific features, often through templates and acquisitions such as Vlocity, to meet these needs. At the same time, it ensures that horizontal capabilities including AI, analytics, integration benefit all sectors. The region's regulatory environment, demand for quick digital wins and competition within each industry drive Salesforce to continuously adapt its approach by vertical. This adaptability has been key to its success in diverse fields, from finance to the public sector.

Salesforce's trajectory in the UK market is positive, provided it remains vigilant about the challenges. The risks mainly revolve around external economic factors, fierce competition and customer success. These can be managed through strategy and investment — many of which Salesforce is already undertaking. The opportunities in the

UK are aligned with Salesforce's strengths, which include innovation, ecosystem building and cross-industry applicability. Salesforce has the chance to not only reinforce its CRM dominance but also become a critical platform for businesses navigating the next decade of digital and AI transformation.

By focussing on customer success to ensure every client gets value from the platform, engaging with the unique aspects of the market such as regulations, culture and business networks, and highlighting success stories to create momentum, Salesforce can continue to grow in the UK.

With its current strategy of heavy investment and focus on AI and industry solutions, Salesforce is well placed to seize the moment, turning potential risks into opportunities to further adapt and solidify its leadership in the region.

Emerging AI technologies

The UK market has shown keen interest in Salesforce's AI-driven features, such as Einstein GPT and Agentforce, which are becoming central to its value proposition. Einstein GPT introduced generative AI (GenAI) natively

into the Salesforce platform. For businesses, this means users can leverage AI assistance within their daily CRM workflows. Sales representatives can autogenerate personalised email drafts or follow-up reminders; service agents can get AI-suggested knowledge article responses to customer inquiries; marketers can have AI create tailored content for campaigns — all by typing natural language prompts in Salesforce. Under the hood, Einstein GPT works by securely blending the enterprise's Salesforce data with large language models (such as OpenAI's GPT-3.5/4) to produce contextually relevant outputs.

The combination of Salesforce's proprietary AI (Einstein) with public models is particularly appealing to companies in the UK that require both innovation and control. They benefit from advanced AI while keeping customer data within Salesforce's trusted boundary. One use case gaining traction in the UK is Einstein GPT for Slack. Internal collaboration can be enhanced by AI summarizing lengthy threads or drafting instant poll questions, improving productivity in workplaces that have adopted Slack for communication.

Salesforce expanded its AI portfolio with Einstein Copilot and the concept of Agentforce. Einstein Copilot is a conversational assistant in every app, allowing users (or even customers on self-service portals) to chat with an AI to retrieve answers or execute actions in Salesforce. For example, a sales manager in London might ask, "Show me this quarter's pipeline by region," and Copilot would generate a report on the fly. This feature aligns with a trend in the UK of using chatbots and assistants to streamline work, building on comfort with AI systems such as chatbots in banking or retail customer service.

Agentforce, unveiled around Dreamforce 2023, takes AI further by enabling fully autonomous agents that perform tasks independently across the Salesforce Customer 360 platform. Rather than just responding with information, an Agentforce bot can act, i.e., log a case, update a record, send an email or even orchestrate a multistep workflow to fulfil an objective. These agents rely on a blend of technologies such as ML, NLP and the logic of Salesforce's Flow automation engine to perceive context, make decisions



and execute actions continuously. In the UK, sectors including financial services and retail are piloting such capabilities. For instance, a UK bank could deploy an autonomous AI agent to handle mortgage inquiries online. In the process, the agent can converse with a customer to gather requirements, perform credit checks via integrated systems and present suitable mortgage options, all without human intervention.

Salesforce reports rapid uptake since Agentforce became generally available (GA) in October 2024. Over 5,000 Agentforce deals were closed in just a few months, indicating strong interest particularly from organisations known to be early cloud adopters. Salesforce CEO Marc Benioff even dubbed late 2024 the *Quarter of Agentforce* highlighting that no product in Salesforce's history has grown as quickly and expressing his excitement about the future.

For UK customers, the impact of Einstein GPT and Agentforce is twofold — productivity gains and competitive differentiation. These AI features directly address common pain points, as businesses in the UK often grapple with efficiency, whether processing a large

volume of customer emails or analysing data promptly for decision-making. Einstein GPT can significantly reduce the time spent generating content or insights, effectively acting as a *co-pilot* for each user.

Meanwhile, Agentforce opens new avenues to serve customers. A UK e-commerce company, for example, can use Agentforce to run an AI-powered shopping assistant on its website that helps customers find products, answer questions and even initiate returns or support tickets automatically. This kind of innovation can set companies apart in terms of CX.

Salesforce also emphasises trust and transparency in these AI features, which are critical concerns in the UK environment.

Features such as the Einstein Trust Layer, which ensures external AI models don't inadvertently retain Salesforce data, and the ability for customers to choose their AI model (OpenAI, Anthropic or bring-your-own-model) give businesses confidence that they can pursue AI without compromising compliance or security.

In a nutshell, Salesforce's emerging AI technologies are quickly becoming integral

to its offerings in the UK market. They promise to transform how users interact with CRM — from manual clicks and typing to conversational queries and autonomous processes. Early adopters in the region are already experimenting with these tools. Salesforce Ben, a popular Salesforce news site, reports that still in its early days, these agents and GPT features could be *game-changing* in the long run. Salesforce's role is to ensure that the technology is useful and easy to implement, converting AI hype into tangible improvements in efficiency and customer satisfaction for organisations in the UK.

Multicloud capabilities are paramount in the AI era

Salesforce and Google have recently expanded their strategic partnership, unveiling a major update that leverages Google's advanced Gemini models to empower Salesforce's Agentforce platform. This collaboration is not just about deploying advanced AI; it also underscores a more expansive, critical shift towards hybrid and multicloud architectures. These architectures enable enterprises to access optimal solutions from multiple vendors,

making it a strategic imperative for leading MSPs and global system integrators.

Central the announcement is integrating Google's Gemini models with Agentforce, allowing AI agents to tackle multimodal tasks. These agents can now process images, audio and video and tap into real-time insights from Google Search via Vertex AI. Such capabilities enable businesses to handle complex, data-rich scenarios — whether tracking shipments in logistics, analysing customer sentiment or processing multimedia customer interactions — all without sacrificing speed or accuracy.

One of the key advantages of this expanded partnership is the enhanced flexibility it provides customers. By allowing Salesforce Service Cloud to integrate more tightly with Customer Engagement Suite with Google AI, enterprises can access advanced contact centre functions such as real-time voice translation, intelligent agent handoffs and personalised recommendations. This flexibility is a direct result of leveraging a multicloud strategy where the best platform features come together seamlessly.



Running Agentforce, Data Cloud and Customer 360 on Google Cloud infrastructure opens new regions and simplifies procurement through 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 means that enterprises can access, integrate and act on data from multiple sources in real time, overcoming traditional data silos and driving more informed decision-making.

Hybrid and multicloud environments are paramount because they provide the agility that modern businesses require. Enterprises are no longer confined to a single vendor's ecosystem as they can now choose the optimal tools to address their needs. This approach prevents vendor lock-in and optimises overall performance, scalability and data security. In a landscape where data volumes are exploding and CX continues to rise, a unified, hybrid platform ensures that organisations can promptly deliver personalised experiences and actionable insights.

Moreover, this partnership highlights the importance of open ecosystems. Businesses benefit from the freedom to select AI models and capabilities that best fit their unique challenges. As organisations increasingly demand integrated solutions that span both on-premises and cloud environments, the need for robust hybrid and multicloud strategies has become crucial. This shift enhances operational efficiency and drives innovation across all facets of customer engagement.

In summary, the Salesforce and Google collaboration is a compelling example of how hybrid and multicloud capabilities reshape 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. Moving deeper into the agentic and AI-accelerated era, these cloud strategies will be the cornerstone of digital transformation, empowering companies to thrive in an increasingly competitive global market.

Salesforce Hyperforce as a catalyst for cloud transformation

Salesforce Hyperforce represents a major evolution in cloud architecture. By reimagining how cloud services are deployed, Hyperforce enables Salesforce's CRM and related services to run on major public clouds while maintaining security, compliance and scalability. This transformation is particularly significant for every enterprise that demands robust data protection, adherence to local regulations and sustainable practices.

Here are some key aspects of Hyperforce that appeal to sustainability-focussed organisations:

- **Scalability and flexibility:** Hyperforce's modern architecture allows organisations to scale their operations seamlessly. This agility reduces resource overprovisioning and lowers energy waste by ensuring that computing power is allocated efficiently according to demand.
- **Enhanced security and compliance:** Companies in the UK operate under stringent data protection laws. Hyperforce's ability to deploy Salesforce services on

regional public clouds means that data residency requirements can be met without compromising performance or sustainability.

- **Optimised resource utilisation:** By leveraging public cloud infrastructure that often incorporates energy-efficient data centres, Hyperforce helps organisations reduce their carbon footprint while achieving high performance.

Net Zero Cloud empowering sustainable business

While Hyperforce redefines the infrastructure layer, Net Zero Cloud 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.

For sustainability-aware organisations, Net Zero Cloud offers several benefits:

- **Integrated sustainability reporting:** The platform consolidates data across an organisation's operations, providing real-time visibility into carbon emissions, energy usage and other environmental metrics.



This integration helps companies adhere to sustainability standards and reporting requirements.

- **Actionable insights:** With its advanced analytics and AI-driven recommendations, Net Zero Cloud empowers decision-makers to identify inefficiencies, optimise energy use and set realistic sustainability goals.
- **Transparency and accountability:** As consumers and regulators increasingly demand transparency, companies using Net Zero Cloud can 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 towards net zero is both measurable and manageable. This makes it a game changer for all businesses that want to balance profitability with environmental stewardship.

Rise of agents in the augmented workforce

AI-driven automation, particularly through Salesforce's Agentforce, is beginning to change

how businesses in the UK operate and has significant societal implications. In business operations, autonomous AI agents are poised to handle various routine tasks, acting as virtual employees. This addition can lead to significant gains in efficiency and consistency. For example, contact centres in the UK often deal with high volumes of customer queries via phone, chat and email. They can instantly deploy Agentforce bots to resolve common inquiries (password resets, order status checks, FAQ answers), reducing wait times and operational costs. For instance, Salesforce's customer support has an Agentforce-based chatbot that manages hundreds of thousands of conversations with high-resolution rates and minimal human intervention, showcasing the feasibility of AI handling complex support dialogues. Companies in the region are beginning to replicate this, particularly in sectors such as e-commerce and travel. Airline customer service or online retail helpdesks are obvious early adopters because they can program agents to follow defined processes (e.g. flight rebooking rules or return policies) and handle surges in volume (such as Black

Friday inquiries) seamlessly. The result is a more scalable and responsive operation as companies can serve customers 24/7 without proportional increases in headcount.

Beyond customer service, autonomous agents are also set to influence internal business workflows. For instance, in sales operations, an Agentforce bot might function as a *digital sales development representative*. The bot can automatically research leads, send introductory emails and schedule qualified meetings for human sales representatives. Salesforce has hinted at use cases such as agents handling questions and booking meetings for sales users, delivering instant ROI by keeping the pipeline warm. In the UK, where businesses are often metrics-driven and focussed on sales productivity, this could mean optimally utilising salesperson's time by letting them focus on closing deals rather than prospecting. Similarly, marketing teams can use AI agents to autonomously run A/B tests or pull performance reports on campaigns when triggered by certain conditions.

Agentforce adds an automation layer to Salesforce's workflow and RPA capabilities (Flow). Rather than waiting for a human to trigger a process, the agent can proactively identify conditions such as a spike in website traffic or an inventory shortage. This level of intelligent automation is a breakthrough from traditional rule-based automation, and businesses stand to gain by achieving a level of operational agility that keeps them competitive globally.

The societal implications of autonomous AI agents are multifaceted. One major consideration is the future of work. As businesses in the UK adopt more AI-driven automation, the nature of specific jobs will evolve. Roles that involve repetitive processing or basic Q&A may become less prevalent, while roles that require complex decision-making, empathy or creative thinking could become more critical. This shift could mean reskilling workers. For instance, a support agent whose routine queries are now answered by AI might be retrained to handle escalated cases or to



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oversee AI's performance. This change adds a new dimension to the existing job, sometimes called an *AI supervisor* or prompt engineer.

Salesforce's workforce surveys indicate that employees in the UK are generally open to AI assistance. A Slack survey found that UK AI adoption by workers rose from 32 to 39 percent recently, but there is caution about job security. This situation calls for a societal response — education systems and corporate training in the UK must pivot towards digital and analytical skills, ensuring the human workforce can work alongside AI. On the positive side, eliminating tedious tasks could improve job satisfaction and reduce burnout. A recent Salesforce study in healthcare suggested that agentic AI could alleviate burnout by freeing up 20-30 percent of clinicians' time from paperwork. Extrapolated to other fields, this finding implies that people can focus more on impactful work. For instance, doctors spend more time with patients, and lawyers focus on strategy instead of document review.

Another societal aspect is *CX and expectations*. As AI agents become more common, UK consumers and citizens will get used to instant

service. This *always-on* assistance could raise the bar for what people expect from businesses and public services. If a bank's AI agent approves a loan in minutes, one would be less tolerant of a lender that takes days. In government services, if a local council uses a bot to let you report and resolve a street light outage overnight, one would expect similar efficiency elsewhere. This trend could create a virtuous cycle of service improvement across industries — essentially, AI agents could drive a new standard of customer service.

However, it also raises equity and accessibility questions, as not all individuals are comfortable interacting with AI or have equal digital access. Companies must ensure they continue to offer human-assisted channels for those who need them or risk alienating some customer segments (e.g., the elderly who might prefer a call from a human agent).

The implications of ethics and trust are significant as well. AI agents making decisions that affect people's lives, including approving a loan or diagnosing an illness via a health bot, must be held to high standards of fairness and transparency. The region is actively discussing

AI governance with initiatives such as the UK's AI Strategy and regulatory guidance. Salesforce's approach is to advocate for risk-based AI regulation and build ethical guardrails into its AI, such as not proceeding with specific actions without human sign-off and providing audit trails of AI decisions, which will be crucial for social acceptance.

Societal trust in autonomous systems will likely grow if early implementations are done responsibly and demonstrate clear benefits. Missteps such as an AI agent that discriminates or a well-publicised error causing harm could erode public trust and result in slow adoption.

In the UK, the impact on the overall economy and productivity is an additional societal factor. The region has historically faced productivity challenges compared to some G7 peers. Autonomous AI agents could boost productivity by automating low-value tasks at scale. AI and automation will add significant value to the UK economy in the coming years, and Salesforce's own contributions via the *Salesforce economy* include job creation in the AI field and increased business output.

If harnessed correctly, Agentforce and similar technologies might help businesses in the UK innovate more swiftly. For instance, a startup can scale customer support rapidly without massive hiring due to AI agents, allowing it to compete with larger firms. On a societal level, this contribution supports economic growth and potentially new types of jobs such as AI oversight and development, balancing the jobs that automation might eliminate. To summarise, AI-driven automation through Agentforce is both a catalyst for business transformation and a topic of societal importance in the UK.

Businesses stand to gain efficiency, and consumers are poised to get improved service quality. Society could benefit from high productivity and new job categories but must manage the transition carefully to address workforce displacement and ethical use. Salesforce's role in this is pivotal for implementing AI ethically and championing a vision where these agents *augment rather than replace* humans (as evidenced by Salesforce referring to this as a *digital labour revolution* that can lead responsibly, it can help ensure the outcomes are primarily positive.



In the coming years, the UK will likely see wide deployment of these technologies, accompanied by ongoing dialogue between tech providers, businesses, regulators and the public to maximise benefits and minimise downsides.

Transitioning from managed services to managed agent services

Amid the current surge in digital transformation, traditional SaaS models are evolving into platforms that integrate intelligent, autonomous capabilities into business operations. Leaders such as Microsoft's CEO Satya Nadella and Salesforce 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.

End of traditional SaaS and the rise of the agentic layer

New era in cloud platforms: Insights from Satya Nadella highlight a clear transition from conventional software models to agile,

AI-integrated cloud platforms. The *SaaS is Dead* narrative is not a statement of obsolescence; it signals the beginning of an era where cloud services are defined by responsiveness, intelligence and autonomy. AI integration enables systems to optimise 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 agentic layer concept 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 amplify human capabilities and drive transformative business change.

Unpacking the opportunity for MSPs

Integration complexity demands specialised expertise: As enterprises adopt platforms powered by autonomous agents, integration becomes increasingly complex. The new agentic layer is not a plug-and-play solution, but requires:

- Tailored configuration and customisation: Agents must align with specific business processes. MSPs must master the design of precise guardrails, effective prompt crafting and seamless integration with legacy systems.
- Continuous optimisation: 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.

Delivering value-added services: Transitioning to an agent-first operational model opens 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 organisations leverage agentic systems, the ability to measure performance, ROI and overall

efficiency becomes crucial. Providers who deliver deep insights will distinguish themselves 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.

Upskilling and technological investment:

To fully capitalise on this opportunity, MSPs must invest in their teams and technology:

- Training programs: Equip staff with the knowledge 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: This is essential for successfully integrating 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.

- **Defined guardrails:** Establish clear operational boundaries for digital agents.
- **Risk management protocols:** Implement strategies to monitor and mitigate risks associated with autonomous operations.
- **Compliance frameworks:** Ensure all agent deployments adhere to industry standards and regulatory requirements.

Educating clients and facilitating change:

Adopting an agent-first model is a technological shift that demands significant organisational, cultural and operational changes. To ease this transition, MSPs must develop educational content articulating 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.

- **Develop educational content:** Create materials that clearly articulate the benefits, potential risks and best practices for managing digital agents.
- **Offer pilot programs:** Provide trial implementations that allow clients to experience the transformative impact of autonomous agents.
- **Facilitate change management:** Support clients through the transition by addressing technical and cultural challenges inherent in this new paradigm.

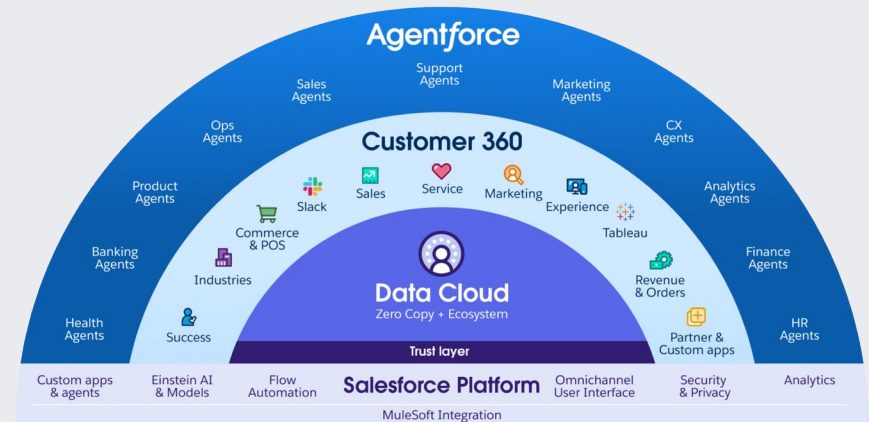
Preparing for a transformed business landscape

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 organisations build their digital workforces, autonomous agents' enhanced efficiency, agility and intelligence will redefine customer interactions, operational workflows and decision-making processes.

Recommendations for forward-thinking businesses

- **Early adoption:** Organisations that invest early in developing or partnering for managed agent services can secure a significant competitive advantage.
- **Invest in talent and technology:** Ensure teams have the necessary skills and tools to fully leverage agentic platforms.

- **Prioritise security and compliance:** Establish robust governance frameworks to safeguard data and maintain trust as agents become integral to operations.
- **Embrace continuous innovation:** With the agentic landscape evolving rapidly, it is essential to stay informed about emerging trends and be prepared to iterate.



The 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 an opportunity to lead by evolving into managed agent service providers that help businesses embrace this shift strategically.

Key takeaways and observations for Quadrant 1

AI-powered Multicloud Implementation Services — Large Enterprises

What makes a strong Leader in Quadrant 1?

A strong Leader in this quadrant demonstrates the following:

- Comprehensive multicloud expertise: Leaders excel at integrating multiple Salesforce clouds with other enterprise systems. They provide end-to-end implementation services — from process consulting and system configuration to legacy migration and data cleanup — while embedding AI and ML capabilities to drive operational efficiency.

- Scalable, AI-powered solutions: Leaders leverage advanced AI tools and ML to enhance predictive analytics, automate processes and enable real-time insights. This capability supports complex, global deployments and differentiates its service offering through tailored, industry-specific accelerators and predefined solutions.
- Robust architectural and technical competencies: Beyond Salesforce, strong Leaders possess deep knowledge of major standard software packages and the ability to design and manage complex application landscapes. This technical prowess, combined with a compelling portfolio of use cases and references, positions them to deliver high-quality, scalable services to large enterprises.

Advice for service providers

1. Invest in advanced integration, predefined accelerators and change management capabilities: Providers should enhance their multicloud integration by developing robust, AI-driven frameworks and industry-tailored accelerators to simplify

complex deployments and strengthen organisational change management (OCM) practices. Incorporating structured change methodologies, agile user adoption strategies and clear OCM frameworks will help enterprises navigate digital transformations with minimal disruption, build trust and accelerate successful adoption.

2. Enhance visibility, client-centric content and local expertise: Besides boosting their presence on platforms such as Salesforce AppExchange with detailed case studies, datasheets and success stories, providers must develop strong local and regional capabilities. This means increasing the number of region-based, Salesforce-certified experts, showcasing regional success stories and potentially expanding tailored solutions to address regulatory and data sovereignty challenges — thereby serving both large enterprises and midmarket clients effectively.

Key takeaways

- Comprehensive multicloud expertise: Success in Quadrant 1 is built on the

ability to deliver end-to-end multicloud implementation services that integrate Salesforce with other enterprise systems. Providers must master the technical and strategic aspects of complex deployments to support large, global enterprises. Robust OCM is critical to helping enterprises adapt to new processes, ensuring smooth transitions and rapid time to value.

- AI and ML as strategic differentiators: Integrating AI-powered analytics, predictive automation and ML into implementations is crucial. These technologies enhance customer interactions and operational accuracy, transforming traditional systems into agile, data-driven environments.
- Scalability and tailored solutions: Leaders are distinguished by their capacity to scale services and tailor solutions to meet industry-specific requirements. Using predefined solutions and robust reference cases, they deliver consistent value and measurable ROI, which is essential in addressing the diverse needs of large enterprises.



Key takeaways and observations for Quadrant 2

Implementation Services for Core Clouds and AI Agents — Midmarket

What makes a strong Leader in Quadrant 2?

A strong Leader in this quadrant is defined by its ability to:

- Deliver agile, end-to-end implementations: They excel at rapidly deploying Salesforce core clouds—such as Sales Cloud, Service Cloud, Commerce Cloud and Experience Cloud—using an agile approach that minimises integration complexity and ensures quick, effective process redesign for midmarket clients.
- Differentiate with AI and Agentforce capabilities: Leaders stand out by integrating autonomous AI agents (Agentforce) and Einstein AI into their service offerings. These advanced capabilities enable smart decision-making, process automation and enhanced customer engagement.
- Utilise predefined accelerators and comprehensive client enablement:

They deploy industry-specific accelerators and predefined solutions that speed up the implementation process while offering strong training and support. This approach empowers client teams to rapidly adapt and maximise the value of their Salesforce investments.

Advice for service providers

1. Invest in accelerators and agile implementation models: Providers can enhance their delivery framework by developing and refining predefined solutions and accelerators tailored to midmarket needs. They should focus on building Agentforce and AI capabilities to accelerate deployments and differentiate their service offerings in a competitive landscape.
2. Prioritise client enablement and robust change management: Midmarket organisations often have limited in-house expertise. Providers can strengthen their offering by incorporating comprehensive training programs, structured OCM strategies and clear user adoption methodologies.

This approach will ensure smooth transitions, build trust and help clients realise rapid, sustainable benefits from their Salesforce implementations.

Key takeaways

- Agile, end-to-end implementation for midmarket success: Providers in this quadrant deliver rapid, agile implementations of Salesforce core clouds with minimal integration complexity, enabling midmarket organisations to streamline operations and quickly adapt to market changes.
- Differentiation through AI and Agentforce: Leaders leverage AI-driven innovations — especially autonomous AI agents such as Agentforce — to enhance decision-making and automate key processes. This improves operational efficiency and adds significant value to CX.
- Tailored solutions and comprehensive client enablement: The use of industry-specific accelerators, predefined solutions and robust training programs is critical. These elements ensure that midmarket clients

achieve a fast time-to-value, enhanced user adoption and sustained digital transformation outcomes.

Key takeaways and observations for Quadrant 3

Implementation Services for Marketing and Commerce with AI Enablement

What makes a strong Leader in Quadrant 3?

A strong Leader in this quadrant effectively combines deep technical expertise with strategic vision.

- Comprehensive implementation capabilities: Leaders must demonstrate robust expertise across Salesforce platforms — ranging from Marketing and Commerce Clouds to Data Cloud, Einstein AI and GenAI. They should excel in consulting, configuration, data migration and go-live support.
- Deep martech and commerce expertise: A strong Leader shows deep technical and strategic knowledge, enabling seamless multicloud integration and the ability to design end-to-end processes. This includes



integrating AI-driven automation for hyperpersonalisation and real-time decision-making.

- **Local market presence and industry relevance:** Leaders have a broad global capability and deliver localised success. They provide UK-specific case studies and industry-specific references that resonate with regional enterprises.
- **Innovative use of AI:** Integrating advanced AI solutions such as predictive analytics, autonomous agents and retail media automation is essential. Leaders are expected to merge AI innovation with industry-specific commerce strategies, setting them apart in an evolving digital landscape.

Advice for service providers

1. **Strengthen local differentiation:** Service providers should focus on building and showcasing localised references and industry-specific success stories. This approach involves tailoring offerings to meet the specific needs of the UK market, which values regional expertise and proven case studies.

2. **Invest in AI-driven innovation:** To stand out, providers must integrate advanced AI technologies into their service portfolio. Merging AI innovations with tailored, industry-specific strategies is crucial for enhancing customer engagement, optimising marketing automation and driving scalable digital transformation.

Key takeaways

- **AI-driven marketing and commerce for hyperpersonalisation:** Providers excel by integrating Salesforce Marketing Cloud and Commerce Cloud with advanced AI tools — such as Einstein AI, GenAI and Agentforce — to enable hyperpersonalised, data-driven CX. This approach drives real-time analytics and omnichannel automation, ensuring brands can respond swiftly to evolving digital demands.
- **Seamless cross-cloud integration and real-time insights:** Success is defined by orchestrating multiple Salesforce clouds, including Marketing Cloud, Commerce Cloud and Data Cloud, to deliver unified customer journeys. Leveraging predefined accelerators

and industry-specific blueprints reduces complexity, speeds up deployments and provides the real-time insights necessary for effective decision-making.

- **Strategic transformation for enhanced CX and measurable ROI:** Providers are strategically transforming CX using AI for predictive analytics, content generation and autonomous decision-making. This enhances customer engagement and ensures scalable implementations and a measurable ROI, positioning brands to drive revenue growth in a competitive landscape.

Key takeaways and observations for Quadrant 4

Managed Application Services — Large Enterprises

What makes a strong Leader in Quadrant 4?

A strong Leader in this quadrant excels by delivering comprehensive, end-to-end managed application services that ensure continuous support and maintenance across complex, global Salesforce environments. They demonstrate:

- **Robust operational expertise:** Leaders have deep experience managing complex application landscapes, from continuous monitoring and remote support to data quality management, security and compliance. Their proven track record includes mature pricing models and outcome-based contracts that guarantee measurable improvements in business value.
- **Advanced automation and AI integration:** They leverage AI-driven insights and intelligent automation to implement predictive maintenance, streamline workflows and reduce operational downtime. This proactive approach enhances system reliability and addresses emerging cyberthreats and regulatory demands, especially in hybrid cloud and multicloud setups.
- **Scalability and continuous improvement:** With scalable delivery models designed for large enterprises, strong Leaders combine comprehensive tool support and rigorous methodologies. They ensure that managed services evolve alongside



business requirements — integrating legacy systems with modern cloud-based solutions to maintain data integrity and compliance across global operations.

Advice for service providers

1. Invest in advanced automation and outcome-based models: Providers should enhance their managed service framework by integrating AI-driven monitoring, predictive maintenance and intelligent automation. They should adopt outcome-based pricing and contract models that tie service value directly to measurable business outcomes. This strategy will build client trust and ensure solutions remain agile and futureproof despite evolving technology and regulatory demands.
2. Strengthen security, compliance and hybrid cloud integration: Given the growing need for data integrity and regulatory adherence, providers should invest in robust security-as-a-service capabilities and comprehensive compliance measures. They should develop expertise in managing hybrid cloud and multicloud environments to integrate legacy systems with modern solutions.

This capability will enhance operational resilience and position their service offering as a critical asset for large enterprises.

Key takeaways

- Integrated and proactive managed services: Leaders offer comprehensive services that include continuous monitoring, remote support and centralised management of Salesforce applications. This integrated approach ensures data integrity, regulatory compliance and sustained operational excellence in complex enterprise environments.
- AI-driven automation enhances security and efficiency: Leveraging AI for predictive maintenance and automation is essential. Strong providers use intelligent monitoring and automation to proactively address issues, reduce downtime and safeguard against cyberthreats while optimising overall business performance.
- Scalable, outcome-based delivery models: Successful managed services hinge on scalable support frameworks and outcome-based pricing. This model aligns service delivery with client success and ensures

that the integration of legacy and cloud-native solutions continuously drives value for large enterprises.

Key takeaways and observations for Quadrant 5

Managed Application Services — Midmarket

What makes a strong Leader in Quadrant 5?

Strong Leaders in this quadrant demonstrate the ability to deliver comprehensive, regionally focussed managed services tailored to midmarket needs. They excel at:

- Comprehensive service delivery: They provide end-to-end support from continuous monitoring, remote support and centralised Salesforce administration to rigorous data quality management and compliance. This ensures smooth day-to-day operations.
- Regional focus and customisation: They offer personalised, local support with teams of Salesforce-certified professionals who understand the unique regulatory and operational challenges midmarket clients face. This localised approach builds trust and ensures adherence to strict security and compliance standards.

- Continuous improvement through automation: They leverage advanced automation, AI-driven insights and robust analytics to optimise maintenance processes and drive ongoing service enhancements. This strategy ensures they deliver measurable business value and improved user adoption.

Advice for service providers

1. Invest in outcome-based, region-specific innovation: Providers should refine their managed service frameworks by integrating advanced automation and AI-driven tools to streamline support operations. They should adopt outcome-based pricing models and tailored SLAs will align service delivery with client success, especially when addressing data quality and security requirements in the midmarket.
2. Enhance local expertise and client enablement: Providers should strengthen their regional support by building teams of Salesforce-certified professionals and developing customised training and change management programs. They should focus



on local nuances and client enablement to improve user adoption and foster long-term relationships and client satisfaction.

Key takeaways

- Tailored managed services for midmarket: Strong leaders deliver comprehensive services focusing on maintenance, data quality and secure Salesforce administration. This approach ensures that midmarket clients receive support precisely tailored to their unique integration needs.
- Regional focus and customised support: Excellence in this quadrant hinges on providing localised, agile support that meets regional regulatory and operational requirements. Providers who adapt their service models to the midmarket environment build stronger, more trusted client relationships.
- Continuous improvement through automation and AI: By harnessing automation and AI-driven insights, leading providers continually refine their managed services. This proactive approach enhances

operational efficiency, drives user adoption and delivers measurable business value for midmarket enterprises.

Key takeaways and observations for Quadrant 6

Implementation Services for Industry Clouds

What makes a strong Leader in Quadrant 6?

Strong Leaders in this quadrant are distinguished by:

- Deep industry expertise and tailored solutions: They possess in-depth knowledge of specific industry domains — such as financial services, healthcare, automotive and life sciences — and have a proven track record in deploying Salesforce industry cloud products. Their ability to develop industry-specific accelerators and proprietary frameworks ensures that implementations are customised to address sector-specific challenges.
- Holistic, AI-driven integration: Leaders deliver core implementation services (consulting, configuration, data migration and go-live support) and integrate multiple Salesforce

offerings with advanced AI capabilities (such as Industries AI and GenAI). This integration creates holistic solutions that streamline operations and drive innovation.

- Proactive innovation and collaboration: Through strategic codevelopment initiatives with Salesforce and by investing in next-generation technologies, these providers continuously evolve their offerings. They leverage partnerships and a microsegmentation strategy to address emerging market needs and maintain economic stability while serving large enterprise clients.

Advice for service providers

1. Invest in vertical specialisation and proprietary accelerators: Providers should focus on deepening domain expertise and developing industry-specific accelerators that directly address the unique challenges of their target sectors. They should leverage new AI capabilities (e.g., Industries AI and GenAI) to craft innovative solutions that are tailored to each industry's nuances.

This specialisation will differentiate their offerings and build strong client trust.

2. Enhance collaborative innovation and certification: Providers should strengthen their strategic partnerships with Salesforce and engage in codevelopment initiatives to build and showcase advanced industry solutions. They should invest in specialised training and certifications for teams and publish compelling case studies highlighting successful implementations. This proactive approach will enhance market visibility and client confidence in their industry cloud expertise.

Key takeaways

- **Deep industry expertise and customised implementations:** Leaders in this quadrant excel by leveraging their robust domain knowledge to deliver tailored solutions for Salesforce industry clouds. Their industry-specific accelerators and specialised frameworks enable clients to overcome unique sector challenges, ensuring high operational efficiency and competitive advantage.



- **Integration of advanced AI and holistic cloud solutions:** Integrating AI-driven insights (via Industries AI and GenAI) with multiple Salesforce products is a critical differentiator. Leaders provide comprehensive, holistic solutions that streamline processes and drive transformative outcomes by aligning technology with industry-specific requirements.
- **Collaborative innovation and adaptive market strategies:** The market is evolving towards codevelopment and vertical specialisation. Providers who forge strong partnerships with Salesforce and continually adapt their offerings through innovation, M&A and the development of proprietary assets are best positioned to lead in the industry cloud space.

Salesforce's AI and automation capabilities are redefining CRM in the UK, empowering businesses to turn data into actionable intelligence. Agentforce and autonomous agents transform workflows, enabling companies to enhance CX. By integrating structured and unstructured data, they create hyperpersonalised experiences. Salesforce remains the trusted platform for UK businesses navigating the next wave of AI-driven digital acceleration.





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
Accenture	Leader	Not In	Leader	Leader	Not In	Leader
Alscient	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Atlantic Technologies	Not In	Product Challenger	Not In	Not In	Not In	Not In
BearingPoint	Not In	Leader	Contender	Not In	Product Challenger	Not In
Bluewave	Not In	Product Challenger	Not In	Not In	Not In	Not In
Capgemini	Leader	Not In	Leader	Product Challenger	Not In	Leader
CGI	Contender	Not In	Not In	Not In	Not In	Not In
Cloobeas	Not In	Contender	Not In	Not In	Contender	Not In
Coforge	Not In	Leader	Not In	Not In	Product Challenger	Contender





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
Cognizant	Leader	Not In	Leader	Leader	Not In	Leader
Concentrix	Not In	Product Challenger	Not In	Not In	Not In	Not In
Credera	Not In	Leader	Leader	Not In	Leader	Not In
Deloitte	Leader	Not In	Leader	Product Challenger	Not In	Leader
Devoteam	Not In	Contender	Not In	Not In	Not In	Not In
Dotsquares	Not In	Market Challenger	Not In	Not In	Not In	Not In
DXC Technology	Contender	Not In	Not In	Not In	Not In	Not In
EPAM Systems	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Product Challenger
Eviden (Atos Group)	Product Challenger	Not In	Contender	Contender	Not In	Contender





	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
Fujitsu	Contender	Not In	Not In	Not In	Not In	Not In
Globant	Product Challenger	Not In	Leader	Product Challenger	Not In	Product Challenger
HCLTech	Leader	Not In	Not In	Leader	Not In	Product Challenger
Hexaware	Not In	Leader	Not In	Not In	Leader	Rising Star ★
IBM	Leader	Not In	Leader	Product Challenger	Not In	Leader
Infosys	Leader	Not In	Leader	Leader	Not In	Leader
KPMG	Contender	Not In	Not In	Not In	Not In	Not In
LTIMindtree	Product Challenger	Not In	Product Challenger	Leader	Not In	Product Challenger
Merkle	Contender	Not In	Product Challenger	Not In	Not In	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
Nebula Consulting	Not In	Market Challenger	Not In	Not In	Not In	Not In
Nextview Consulting (Sabio Group)	Not In	Not In	Not In	Not In	Leader	Not In
NTT DATA	Rising Star ★	Not In	Not In	Rising Star ★	Not In	Product Challenger
OSF Digital	Leader	Not In	Product Challenger	Product Challenger	Not In	Contender
Persistent Systems	Product Challenger	Not In	Contender	Contender	Not In	Product Challenger
Pracedo	Not In	Leader	Not In	Not In	Product Challenger	Not In
Publicis Sapient	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
PwC	Leader	Not In	Product Challenger	Product Challenger	Not In	Leader
R3 Digital	Not In	Contender	Not In	Not In	Not In	Not In





	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
Reply	Not In	Leader	Rising Star ★	Not In	Leader	Product Challenger
Sabio	Not In	Leader	Not In	Not In	Not In	Not In
Silver Softworks	Not In	Product Challenger	Not In	Not In	Contender	Not In
Slalom	Product Challenger	Not In	Not In	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Leader	Not In	Leader
Tech Mahindra	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Product Challenger
ThirdEye Consulting	Not In	Contender	Not In	Not In	Contender	Not In
UST	Not In	Leader	Not In	Not In	Not In	Contender
Valtech	Not In	Product Challenger	Contender	Not In	Not In	Not In





Provider Positioning

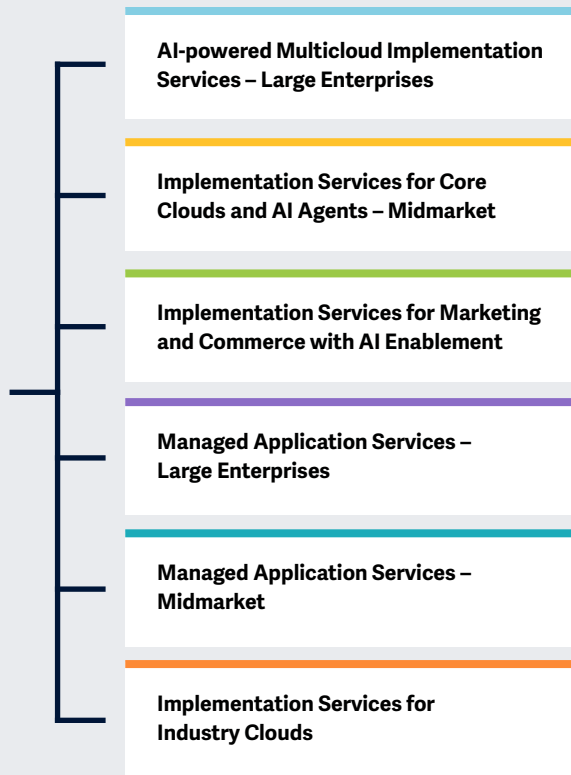
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	AI-powered Multicloud Implementation Services – Large Enterprises	Implementation Services for Core Clouds and AI Agents – Midmarket	Implementation Services for Marketing and Commerce with AI Enablement	Managed Application Services – Large Enterprises	Managed Application Services – Midmarket	Implementation Services for Industry Clouds
VASS	Not In	Contender	Contender	Not In	Not In	Not In
VRP Consulting	Not In	Leader	Contender	Not In	Not In	Not In
Westbrook International	Not In	Contender	Not In	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Leader	Not In	Leader
WPP	Contender	Not In	Product Challenger	Not In	Not In	Not In
Xenogenix	Not In	Not In	Not In	Not In	Rising Star ★	Not In
Zensar Technologies	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In



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

Simplified Illustration Source: ISG 2025



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 categorisation 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 focussed 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, 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.
- 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).

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.





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





AI-powered Multicloud Implementation Services – Large Enterprises

Who Should Read This Section

This report is valuable for providers offering AI-powered multicloud implementation services in the UK 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, offers a comprehensive overview of the market's competitive landscape and examines how each addresses key regional challenges.

Technology professionals

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

Digital professionals

Tasked with enhancing the digital transformation of enterprises should read this report to learn how AI is infused within Salesforce's solutions portfolio.

Business professionals

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

Procurement professionals

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



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

U.K. 2025



This quadrant evaluates providers and their ability to **integrate Salesforce** clouds into **complex enterprise systems** to **accelerate** e-commerce at scale, **aligning AI-powered advancements** in **technology** with **organisational change**.

Roman Pelzel



AI-powered Multicloud Implementation Services – Large Enterprises

Definition

This quadrant focusses on providers of Salesforce implementation services, emphasising 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 realisation 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
7. Compelling list of **use cases and references**



AI-powered Multicloud Implementation Services – Large Enterprises

Observations

In the evolving Salesforce ecosystem, a strong emphasis is on integrating AI capabilities within multicloud implementation services. Providers are increasingly recognising the necessity of a cohesive digital strategy that unifies various platforms to enhance operational efficiency and optimise CX. Recent M&A signals a strategic shift towards leveraging AI and analytics capabilities for improved customer interactions.

Amid these developments, 2025 has witnessed significant changes in provider positioning within the Salesforce ecosystem. Globant has dropped from Leader to Product Challenger. Furthermore, Deloitte has enhanced its competitive strength and earned the recognition of a Leader this year. Similarly, OSF Digital has enhanced its portfolio attractiveness and has become a Leader this year. NTT DATA has become the Rising Star, showcasing robust growth and innovative solutions.

Integrating AI-powered solutions is essential for providers to deliver tailored experiences. In this competitive space, strategic positioning and collaborations serve as benchmarks of success

in leveraging technology for transformative outcomes. Such initiatives will continue to shape the Salesforce ecosystem, driving organisational growth and enhanced client value across diverse industries.

From the 52 companies assessed for this study, 26 qualified for this quadrant, with eleven being Leaders and a Rising Star.

accenture

Accenture enhanced Salesforce capabilities when it acquired Incapsulate and added over 275 certified experts. Partnerships with Tableau, MuleSoft, Einstein AI and Slack drive digital transformation. Its expertise in multicloud architecture fosters innovation and agility.

Capgemini

Capgemini's Generative AI for CX Foundry enhances customer interactions using AI expertise. As a Global Summit Consulting Partner with Salesforce, it offers advanced solutions and drives growth in the UK with tailored multicloud services and €1 billion investment in AI.

cognizant

Cognizant has a robust Salesforce practice with certified consultants. As a Customer Success Partner of the Year for MuleSoft, it excels in integration and multicloud services. Its Data Cloud modernises data sources, while AI use cases help industries leverage GenAI.

Deloitte.

Deloitte and Salesforce enhance CX with data and AI for personalised messaging. Its expertise in sectors such as automotive and financial services boosts customer loyalty. Custom AI solutions improve productivity, supported by Deloitte's Trustworthy AI™ framework.

HCLTech

HCLTech leverages the InFusion Suite and Einstein AI to boost productivity by 20-30 percent. With the FENIX 2.0 framework, it aligns multicloud strategies for digital transformation while ensuring GDPR compliance and AI governance for secure multicloud infrastructures.

IBM

IBM excels in AI and automation with Watson for enhanced CX and meets diverse needs through 6,500 certified Salesforce experts. As a Salesforce Summit Partner and Data Cloud Innovation winner, IBM delivers tailored, high-quality multicloud implementation solutions.

Infosys®

Infosys is committed to continuous innovation by allocating a significant portion of its Salesforce services revenue to R&D. This strategy enables the creation of proprietary tools and platforms that enhance service delivery and meet clients' evolving needs.

OSF Digital

OSF Digital specialises in designing robust cloud architectures for seamless integration and scalability. It facilitates application and data migration with minimal disruption while providing comprehensive security and ensuring regulatory compliance to optimise efficiency.



AI-powered Multicloud Implementation Services – Large Enterprises



PwC's technical expertise is evident in its ability to create detailed documentation on Salesforce architectures and APIs, adhere to coding standards and automate the generation of Apex classes.



TCS empowers organisations to accelerate their cloud-driven transformation journeys and create substantial value through TCS Crystallus™. This suite is a collection of preconfigured industry solutions and composable business applications.



Wipro's hybrid Agile methodology supports clients throughout a project lifecycle, ensuring they receive comprehensive guidance, from strategic development to post-implementation support.



NTT DATA (Rising Star), as the #2 MuleSoft Global Partner and an eight-time Partner of the Year Award winner, underscores its leadership in MuleSoft implementations and commitment to quality, evidenced by a CSAT score of 4.8 out of 5.0 on the Salesforce AppExchange.





“Cognizant’s leadership in this quadrant is attributed to its expertise in MuleSoft-based integrations, robust data cloud capacity and industry-specific AI solutions.”

Roman Pelzel

Cognizant

Overview

Cognizant is headquartered in New Jersey, US. It has more than 336,600 employees across over 50 countries. In FY24, the company generated \$19.7 billion in revenue, with Health Sciences as its largest segment. Cognizant’s focussed approach helps clients create connected, pan-industry products and services, primarily multicloud solutions. These solutions include Salesforce industry clouds, Marketing Cloud, Revenue Cloud, Commerce Cloud and MuleSoft. Cognizant’s Salesforce practice in EMEA is based in the UK and includes more than 360 certified professionals. Cognizant has been honoured with two Partner Innovation Awards in 2024 by Salesforce in the Core CRM and AI category.

Strengths

Extensive expertise and certifications: Cognizant has an evolving Salesforce practice, boasting more than 12,250 certified consultants and over 44,300 certifications across various Salesforce products and services. It has been recognised as a Customer Success Partner of The Year for MuleSoft, 10 times, demonstrating its expertise in integration solutions critical for multicloud environments.

Robust data cloud capacity: Cognizant’s Data Cloud offering supports over 30 clients and has modernised more than 1,000 data sources. It provides specialised knowledge and experience in implementing customer data platforms, thereby accelerating clients’ time to value through effective data analytics and insights. The offering includes a range

of data solutions, from small homegrown databases to large enterprise data platforms, enabling clients to streamline and enhance their data management capabilities.

Industry-specific AI solutions and use cases: Cognizant has developed a library of over 50 enterprise use cases with tailored AI solutions for critical industries to guide businesses in implementing GenAI strategies. These targeted use cases assist clients in assessing and prioritising their investments and provide a structured approach to integrating AI into their specific business processes.

Caution

While Cognizant performs well across KPIs, particularly in portfolio attractiveness and market strength, it can improve its presence on the Salesforce AppExchange. Increasing the number of showcased content and projects will highlight its capabilities and successes to potential clients.





Implementation Services for Core Clouds and AI Agents — Midmarket

Who Should Read This Section

This report is valuable for providers offering implementation services for core clouds and AI agents in the UK 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, offers a comprehensive overview of the market's competitive landscape and examines how each addresses key regional challenges.

Marketing and sales professionals

Should read this report to examine 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 improve sales and service agents' platform performance using Salesforce's Data Cloud, Einstein GenAI and Agentforce.

Business professionals

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

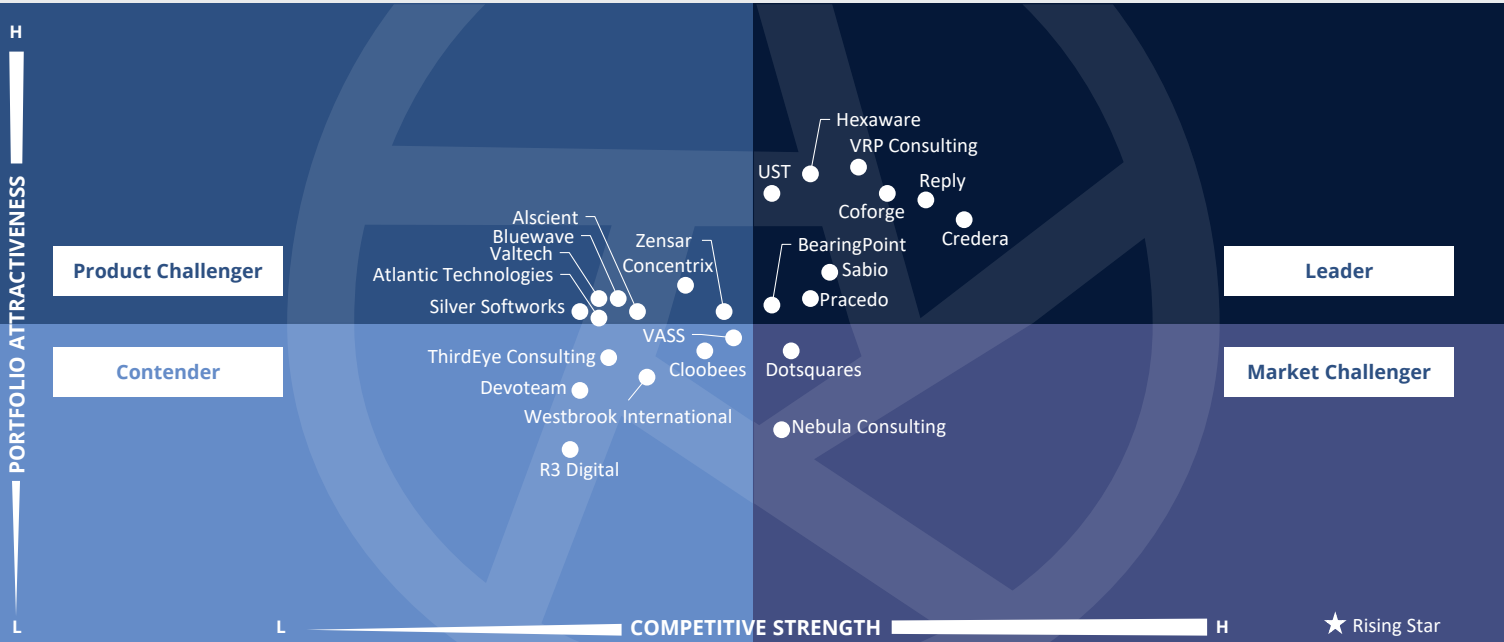
Procurement professionals

should read this report to understand how Salesforce providers compare their specific strengths and the areas where they still need improvement.



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

U.K. 2025



This quadrant focusses on **empowering** UK midmarket organisations **with Salesforce core clouds, Agentforce and Einstein AI**. Providers drive **advanced automation** and **smart decision-making** to accelerate digital customer-centric transformation.

Roman Pelzel



Implementation Services for Core Clouds and AI Agents – Midmarket

Definition

This quadrant will assess providers specialising in Salesforce's core offerings — Sales Cloud, Service Cloud, Commerce Cloud and Experience Cloud. These products are considered 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, focussing 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

Implementation services for Salesforce core clouds in the UK midmarket remain dynamic, with companies broadening their focus beyond narrow segments. Go-to-market strategies are adapting to align with Salesforce innovations and competitive demands, resulting in notable year-over-year shifts.

VRP Consulting, Coforge, Reply and Credera have improved their portfolio attractiveness by enhancing their offerings with data and AI capabilities, including Agentforce. They are now close to Hexaware, which maintains one of the most appealing portfolios in this segment.

Coforge and UST have strengthened their competitive positions, with Coforge capturing a larger share of deals than before and UST implementing a more cohesive go-to-market strategy than it did in the past, advancing from last year's Rising Star and Product Challenger position, respectively, to that of Leaders.

Sabio Group's Salesforce Practice (the formerly independent Salesforce consultive partner,

makepositive) has focussed on CX with an emphasis on Service Cloud Voice, impacting its overall portfolio attractiveness. Despite this, it has retained a strong expert team. With the acquisition by Nextview Consulting at the end of 2024, Sabio's Salesforce Practice is expected to gain additional strength.

Pracedo has also improved its competitive strength under its parent company Ascendion, positioning itself close to Sabio's Salesforce Practice.

Two companies experienced a decline in competitive strength due to minimal improvements in their go-to-market strategies. Zensar dropped from the Leader zone to a Product Challenger and BearingPoint, which previously benefited from the acquisition of Simplicity, has shown no significant refresh in its UK market proposition.

From the 52 companies assessed for this study, 24 qualified for this quadrant, with nine being Leaders.

BearingPoint

BearingPoint delivers Salesforce services that enhance CX through its CX First methodology and product expertise, driving transformation. The company also offers three free apps and a paid SaaS solution, leveraging advanced technologies via AppExchange.

Coforge

Coforge excels in the UK, driving digital transformation for banks and modernising processes across sectors. As Agentforce partner, it builds trust in AI and develops agents for service, sales, commerce and specialised industry processes.

Credera

Credera offers boutique Salesforce services, including AI everywhere, to leverage AI across business operations and data products to drive value and innovation. As an Agentforce implementation partner, the company focusses on every touchpoint in a customer journey.

HEXAWARE

Hexaware utilises over a decade of Salesforce expertise to assist midsize to large companies across sectors with frameworks, including North Star, and methodologies such as Scaled Agile. By doing so, it enhances customer journeys and automates processes, particularly in finance and healthcare.

Pracedo

Pracedo, under Ascendion, focusses on maximising Salesforce ROI and has expanded its team from 65 to over 80 Salesforce experts globally and now has a presence in London and Amsterdam. It supports various industries and is listed as an Agentforce implementation partner.



Implementation Services for Core Clouds and AI Agents – Midmarket



Reply is a Salesforce EMEA Strategic Partner, recognised for its expertise in Customer 360, Service Cloud, Experience Cloud, Sales Cloud and Data Cloud. As an Agentforce partner, Reply works with clients to automate and personalise agents for customer service, sales and marketing.



Sabio's Salesforce Practice, soon to integrate with Nextview Consulting, has completed over 1,800 projects, boasting 500 certifications. With a CSAT of 4.9 out of 5, it enhances digital transformations using AI services and tailored solutions across Salesforce core clouds.



UST provides Salesforce services in consulting, implementation and application support. Its differentiators include a partnership approach, delivery excellence and continuous improvement. UST's starter packages for Salesforce accelerate business onboarding.

VRP Consulting

VRP Consulting is recognised by Salesforce for its core cloud capabilities and has earned Navigator Expert badges. The company, awarded for excellence in AI with the Digital Revolution Award in 2024, offers extensive services and assists ISVs with app development.





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 the UK 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, offers a comprehensive overview of the market's competitive landscape and examines how each addresses key regional challenges.

Marketing and sales professionals

Should read this report to learn how providers use AI to identify the optimal action, generate content and personalise 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.

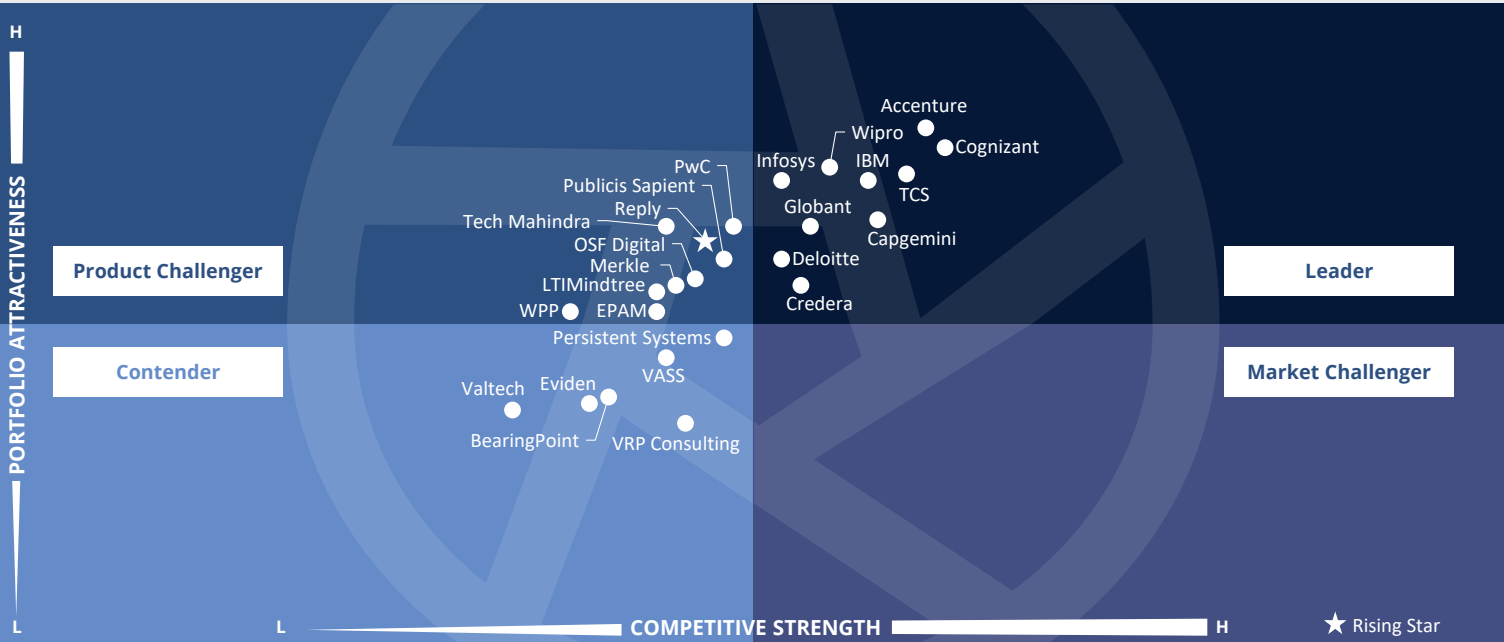
Procurement professionals

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



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

U.K. 2025



This quadrant evaluates providers' ability to **integrate Salesforce AI-powered marketing and commerce solutions across ecosystems** for hyperpersonalised CX, predictive automation and smooth omnichannel engagement for optimised digital value streams.

Roman Pelzel



Implementation Services for Marketing and Commerce with AI Enablement

Definition

This quadrant examines providers specialising in Salesforce Marketing and Commerce Cloud services. It focusses 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, personalised 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
6. Compelling list of **use cases and references**



Implementation Services for Marketing and Commerce with AI Enablement

Observations

The rapid adoption of AI-powered automation, hyperpersonalisation and omnichannel commerce strategies drives the market for Salesforce Marketing Cloud and Commerce Cloud services. Enterprises prioritise real-time customer engagement, predictive analytics and AI-driven content generation, reinforcing the need for providers with deep martech expertise and advanced AI capabilities.

This year's Leaders distinguish themselves through seamless multicloud integration, leveraging Salesforce Data Cloud, Einstein AI and Agentforce to enhance CX, optimise marketing automation and streamline commerce operations. Composability and headless commerce architectures are gaining traction, allowing brands to build scalable, modular digital experiences.

The demand for retail media and AI-powered advertising solutions has surged, prompting providers to integrate AI-driven campaign automation, predictive pricing and customer

segmentation into their offerings. However, while global players hold strong capabilities, regional differentiation remains challenging, with enterprises in the UK increasingly seeking localised references and industry-specific success stories.

Leaders exhibit broad AI-powered marketing and commerce expertise, strong local market presence and deep integration across Salesforce clouds. Product Challengers offer innovative accelerators and automation tools yet lack the scale or local client adoption to compete with Leaders. Contenders are niche specialists with proprietary capabilities. To climb the quadrant, they must broaden their service portfolio and UK presence.

Future differentiation will hinge on providers' ability to merge AI innovation with industry-specific commerce strategies.

From the 52 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and a Rising Star.

accenture

Accenture, leveraging Accenture Song, integrates Salesforce GenAI, Einstein AI and Data Cloud to power hyperpersonalised customer journeys, intelligent commerce strategies and automated marketing intelligence, ensuring omnichannel success with Salesforce solutions.

Capgemini

Capgemini pioneers AI-powered personalisation, predictive analytics and omnichannel commerce. Leveraging Salesforce Data Cloud and automation enables seamless customer journeys, real-time engagement and scalable digital transformation, driving brand loyalty and growth.

cognizant

Cognizant's AI-first approach to Salesforce-powered marketing and commerce transforms how brands engage customers. With predictive revenue intelligence, omnichannel automation and real-time personalisation, the company accelerates digital sales and customer lifetime value.

Credera

Credera empowers brands with AI-optimised customer journeys, predictive commerce automation and seamless omnichannel engagement. By leveraging Salesforce B2B and B2C Commerce Cloud, it enhances pricing strategies, personalises at scale and drives business growth.



Implementation Services for Marketing and Commerce with AI Enablement

Deloitte.

Deloitte's full-stack Salesforce Marketing Cloud expertise enables businesses to maximise AI-powered marketing automation, predictive analytics and cross-cloud commerce, leveraging real-time customer insights, GenAI content creation and omnichannel execution.

Globant >

Globant's Expert-level Salesforce Marketing Cloud capabilities power AI-driven personalisation, automated journey orchestration and omnichannel marketing. By integrating predictive analytics and real-time insights, the company accelerates commerce transformation.



IBM, a Salesforce Global Strategic Partner, empowers businesses with AI-led automation, real-time segmentation and omnichannel marketing solutions. Its predictive AI models and industry accelerators streamline customer journeys and optimise revenue potential.



Infosys transforms AI-driven marketing and commerce with Salesforce Agentforce, Einstein AI and Infosys Aster™. Leveraging predictive automation, hyperpersonalisation and next-best-action insights enables enterprises to optimise customer engagement and maximise value.



Wipro orchestrates AI-driven commerce and marketing with Salesforce, ensuring cross-cloud connectivity, real-time engagement and predictive automation. Its API-first architecture and omnichannel expertise empower brands to optimise CX across touchpoints.



Reply (Rising Star) drives AI-led omnichannel transformation, integrating Salesforce with MuleSoft and martech stacks to automate campaigns, streamline checkout experiences and enhance customer engagement. Its industry-focussed accelerators power data-driven growth for enterprises.





“Cognizant’s expertise in AI-powered marketing automation and commerce intelligence makes it a top Salesforce partner in the UK. As an 11-time Salesforce Partner Innovation Award winner, it delivers seamless, data-driven CX at scale.”

Roman Pelzel

Cognizant

Overview

Cognizant is headquartered in New Jersey, US. 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 leading provider of Salesforce Marketing and Commerce Cloud implementations, enabling enterprises in the UK to optimise customer engagement, personalise marketing automation and enhance digital commerce strategies. The company holds 11 Salesforce Partner Innovation Awards, underlining its capabilities to help organisations deliver seamless omnichannel experiences, improve conversion rates and drive revenue growth through AI-powered automation.

Strengths

AI-driven revenue optimisation: Cognizant enhances Salesforce Loyalty Management, Revenue Cloud, and configure, price, quote (CPQ) with AI-powered pricing, predictive customer retention strategies and automated revenue forecasting. Leveraging real-time insights into customer behaviour and intelligent pricing models, it helps businesses maximise sales potential and improve profitability across digital and physical commerce channels.

Seamless multicloud integration for omnichannel experiences: Cognizant integrates Salesforce Marketing Cloud, Commerce Cloud, MuleSoft and Data Cloud to provide frictionless, omnichannel customer journeys. By connecting data across multiple touchpoints, including web,

mobile, social and in-store interactions, Cognizant ensures consistent, AI-enhanced CX that drives loyalty and retention.

AI-powered customer engagement at scale: Cognizant leverages Einstein AI, Data Cloud and Agentforce to deliver hyperpersonalised marketing and commerce experiences. Its AI-driven journey automation, real-time segmentation and predictive analytics enable enterprises to enhance customer engagement, increase conversion rates and drive revenue growth through targeted, data-driven interactions. Cognizant has executed complex, high-impact Salesforce marketing and commerce transformations for Fortune 500 enterprises.

Caution

While Cognizant has a strong global reputation in Marketing and Commerce Cloud transformations, increasing the visibility of UK-specific success stories and industry references would reinforce its position. The company should also highlight how it has transformed brands by leveraging Salesforce solutions.





Managed Application Services – Large Enterprises

Who Should Read This Section

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

Marketing and sales leaders

Should read this report to effectively analyse 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 use 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.

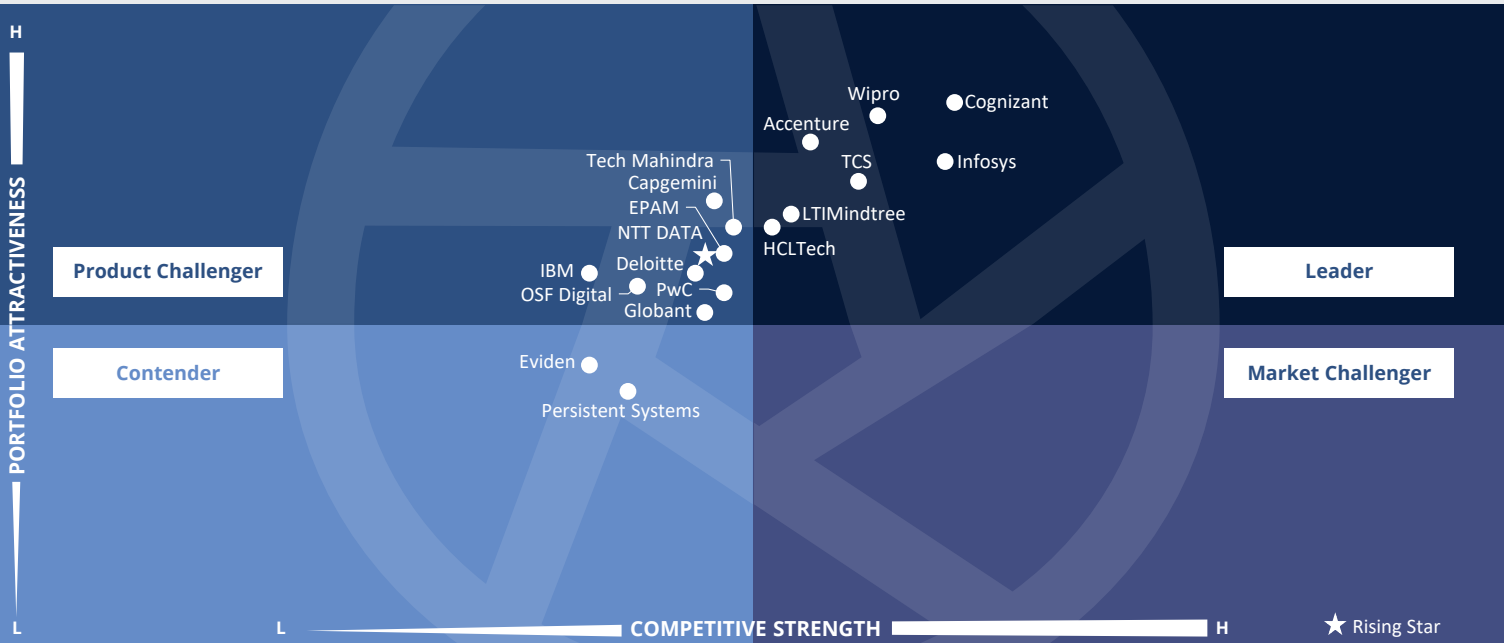
Security and data professionals

Should read this report to understand how providers adhere to UK security laws for Salesforce integration and compare practices for an improved understanding.



Salesforce Ecosystem Partners
Managed Application Services – Large Enterprises

U.K. 2025



This quadrant assesses providers of managed application services for Salesforce, highlighting their crucial role in the **maintenance, support, compliance and enhancement of business value** through **data integrity and security** in complex enterprise environments.

Roman Pelzel



Managed Application Services – Large Enterprises

Definition

This quadrant assesses providers that offer managed application services for maintenance and support functions. These include continuous monitoring, remote support, centralised 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 characterised by solutions from various software providers, necessitating centralised management and support.

This quadrant emphasises 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

The landscape of managed application services for large enterprises in the UK is rapidly evolving, driven by key trends. One significant trend is the shift towards hybrid cloud and cloud-native architectures, with UK enterprises increasingly adopting strategies that emphasise multicloud management and the integration of legacy systems with new cloud-based platforms. This trend is especially relevant in industries such as finance, healthcare and the public sector, where strict data privacy and compliance regulations require a balance between cloud and on-premises solutions. MSPs must evolve their offerings to ensure seamless orchestration across diverse cloud environments, thus providing enterprises with the agility needed to scale effectively.

Another notable trend is the growing focus on automation and the generation of AI-driven insights. Many organisations are leveraging AI within their managed services to implement predictive maintenance, optimise

processes and resolve issues in real time, thereby streamlining workflows and reducing operational downtime. Additionally, prioritising data security and compliance remains essential due to the rising number of cyberthreats. Enterprises seek managed services that not only offer traditional support but also incorporate security-as-a-service solutions to address these challenges, particularly in the post-Brexit landscape where adherence to local data protection regulations is mandatory.

Lastly, there is an increasing adoption of DevOps models and a focus on enhancing CX through advanced analytics and omnichannel support. These practices help foster collaboration, improve development efficiency and promote personalised marketing strategies to boost customer engagement.

From the 52 companies assessed for this study, 18 qualified for this quadrant, with seven being Leaders and a Rising Star.

accenture

Accenture's strategic focus on placing clients at the forefront of technology and innovation fosters sustainable growth. By integrating advanced technologies with human insights, the company empowers clients to adapt and thrive in a rapidly evolving digital environment.

cognizant

Cognizant's suite of proprietary industry-specific solutions, including AppLens, Neuro IT Operations, Code Sense for Salesforce, OmniServe Next and MedVantage, harness AI and automation to enhance operational efficiencies and drive strategic value across various domains.

HCLTech

HCLTech's approach aligns application operations with business value streams, helping organisations enhance key performance indicators (KPIs) and achieve strategic goals, while end-to-end observability and AI-driven decision-making simplify application management and optimise operational efficiency.

Infosys

Infosys is a leading provider in the Salesforce managed services space, backed by a robust team of over 3,500 application management services (AMS) professionals and 5,300 certified AI experts, indicating a significant depth of expertise and capacity to deliver advanced solutions.



Managed Application Services – Large Enterprises



LTIMindtree's AVM 360 supports the entire Salesforce lifecycle, including strategy, design, configuration, development, testing and deployment, ensuring timely, budget-conscious delivery while centralising change management through a structured Dev-QA-Prod process.



TCS leverages the integration of AIOps to facilitate proactive incident management and optimise technology lifecycle operations. By focussing on application security and governance, it enhances the overall reliability and security of client applications.



Wipro provides flexible managed application services for Salesforce through dedicated, shared and hybrid models. The company implements a structured service management framework, including SLA monitoring, based on specific KPIs and SLAs agreed upon with customers.



NTT DATA (Rising Star), with over 10,650 Salesforce and MuleSoft certifications, is well equipped to deliver tailored solutions that enhance operational efficiency and CX. Its extensive knowledge base enables it to implement best practices and innovative strategies.



Cognizant



“Cognizant leads in managed application services by enabling clients to activate Einstein through innovative GenAI solutions, while its Neuro IT Operations revolutionises digital transformation with AI-driven automation and proactive incident management.”

Roman Pelzel

Overview

Cognizant is headquartered in New Jersey, US. It has more than 336,800 employees across over 50 countries. In FY24, the company generated \$19.7 billion in revenue. Cognizant excels in providing comprehensive managed application services throughout the entire application lifecycle, encompassing the development and management of existing applications. Coupled with application modernisation services, these solutions empower clients in the UK to adapt their application and data portfolios to meet evolving business demands. This approach drives investment in application, data and cloud modernisation, enhancing enterprise capability and digital revenue growth.

Strengths

AI-driven IT operations: Cognizant’s Neuro IT Operations platform prioritises AI-driven automation to revolutionise digital transformation. This robust platform delivers comprehensive monitoring across the entire technology spectrum, facilitates proactive incident detection and resolution, and offers real-time insights into operational performance. Its GenAI features enhance self-service support by leveraging an extensive repository of historical issues and solutions, ensuring effective knowledge management.

Innovation partner in AI and data: Cognizant is the preferred innovation partner, consistently leading in AI, data and Salesforce technologies. The company is recognised for its integration capabilities

and specialises in next-generation solutions, including autonomous agent-driven services and advanced AI-embedded offerings.

Enhancing managed application services with Einstein: Cognizant has refined its managed application services to help enterprise clients activate Einstein as part of its Generative AI Confluence offering. Emphasising innovation and engineering, Cognizant is committed to upskilling talent globally on Agentforce with tailored curricula for various roles. A dedicated governance team further ensures the ethical use of AI within the CRM landscape, prioritising privacy, fairness and accountability.

Caution

Cognizant should highlight its managed application services capabilities in the UK through joint go-to-market initiatives to improve visibility and expand market presence. Securing an Expert-level designation for managed services on AppExchange is also essential for enhancing its competitive edge.





Managed Application Services – Midmarket

Who Should Read This Section

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

Marketing and sales leaders

Should read this report to effectively analyse 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 use 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.

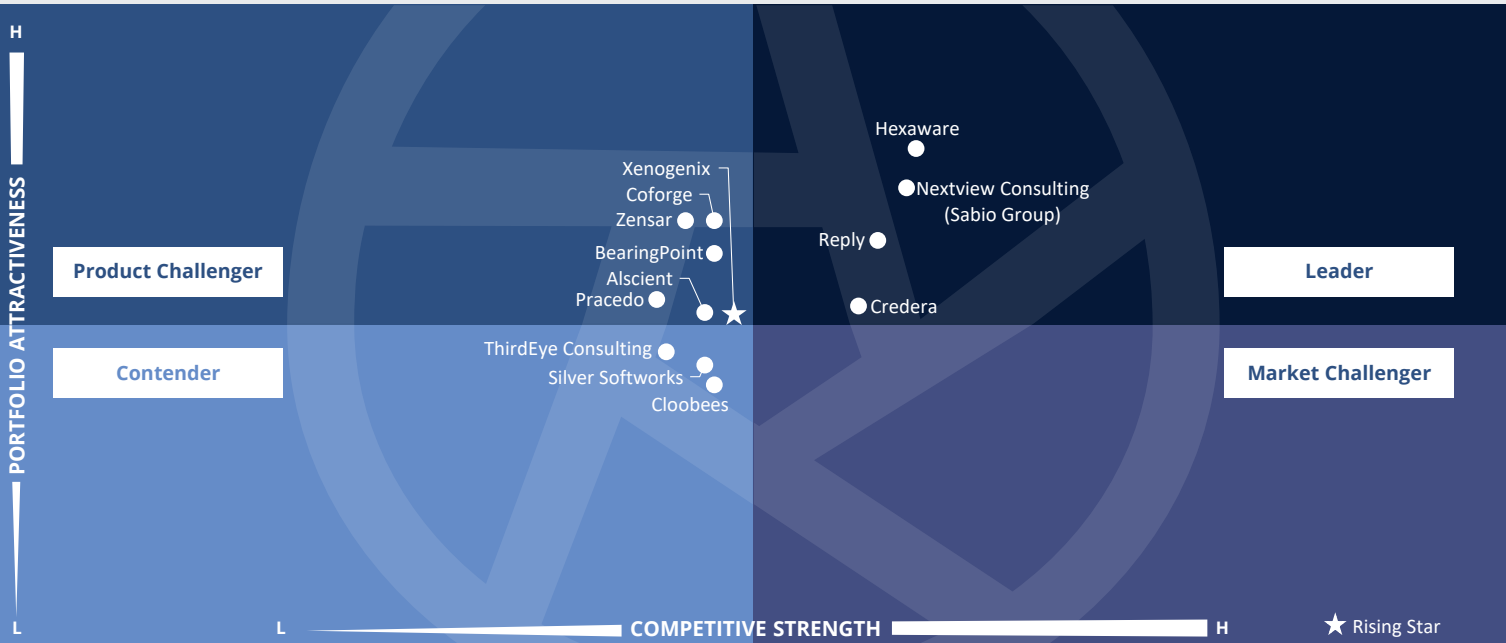
Security and data professionals

Should read this report to understand how providers adhere to UK security laws for Salesforce integration and compare practices for an improved understanding.



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

U.K. 2025



This quadrant highlights providers specialising in Salesforce managed services that prioritise **maintenance, regional support and data quality management** tailored to midmarket clients with **distinct integration requirements**.

Roman Pelzel



Managed Application Services – Midmarket

Definition

This quadrant focusses on providers' proficiency in offering managed services that include vital maintenance and support functions, such as monitoring, remote support, centralised 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

The managed application service landscape for midmarket enterprises in the UK is experiencing significant change, driven by key trends. A primary trend is the emphasis on security and compliance, with enterprises prioritising robust measures, such as encryption and vulnerability assessments, as they transition to cloud-native applications. This focus highlights the increasing importance of safeguarding sensitive information while enhancing operational agility and managing technical debt. Another key development is the integration of advanced technologies along with sustainability initiatives. Organisations are leveraging AI and automation to boost user productivity and improve CX using tools such as Salesforce Agentforce for streamlined workflows. Meanwhile, eco-friendly practices such as leveraging energy-efficient data centres align with corporate social responsibility goals.

The midmarket in the UK is embracing digital transformation by seeking managed services that facilitate application modernisation for improved efficiency and competitiveness.

Providers are responding with tailored, industry-specific solutions that leverage Salesforce capabilities while emphasising CX. Finally, the growing shift towards data-driven decision-making underscores the need for AI-driven insights. Businesses are enhancing customer interactions using tools such as Salesforce Data Cloud to unify data. This approach necessitates MSPs to integrate robust analytics capabilities into their offerings.

From the 52 companies assessed for this study, 13 qualified for this quadrant, with four being Leaders and a Rising Star.

Credera

Credera's thorough understanding of each client's requirements can be attributed to its in-depth Salesforce expertise and boutique consulting capability. These attributes make Credera an extension of the client's team and maximise the value of Salesforce investments, reinforcing its position as a Leader.

HEXAWARE

By leveraging modern practices such as Agile and DevOps, **Hexaware's** application managed services position organisations to meet current technological demands and stay ahead in an evolving digital landscape.

Nextview Consulting

Sabio and **Nextview Consulting's** commitment to investing in advanced technologies, such as Service Cloud Voice and AI solutions, underscores their dedication to improving CX and operational efficiency with the global contact centre ecosystem.

REPLY

Reply's Salesforce managed application services emphasise seamless integration with existing business processes. By merging technical expertise with its customer-focussed approach, the company delivers ongoing support that aligns with clients' strategic objectives.

Xenogenix

Xenogenix's (Rising Star) Salesforce managed services empower client teams by taking charge of their ongoing Salesforce management. The company focusses on boosting user adoption and continuously optimising the platform to ensure it aligns with clients' evolving business needs.





Implementation Services for Industry Clouds

Who Should Read This Section

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

Technology professionals

Managing platforms that support vertical-specific processes should read this report to learn how Salesforce industry clouds deliver innovative frameworks and integrations.

Digital professionals

Tasked with enhancing digital transformation within enterprises should read this report to examine the trade-offs between customising multicloud and transitioning to industry clouds.

Business professionals

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

Procurement professionals

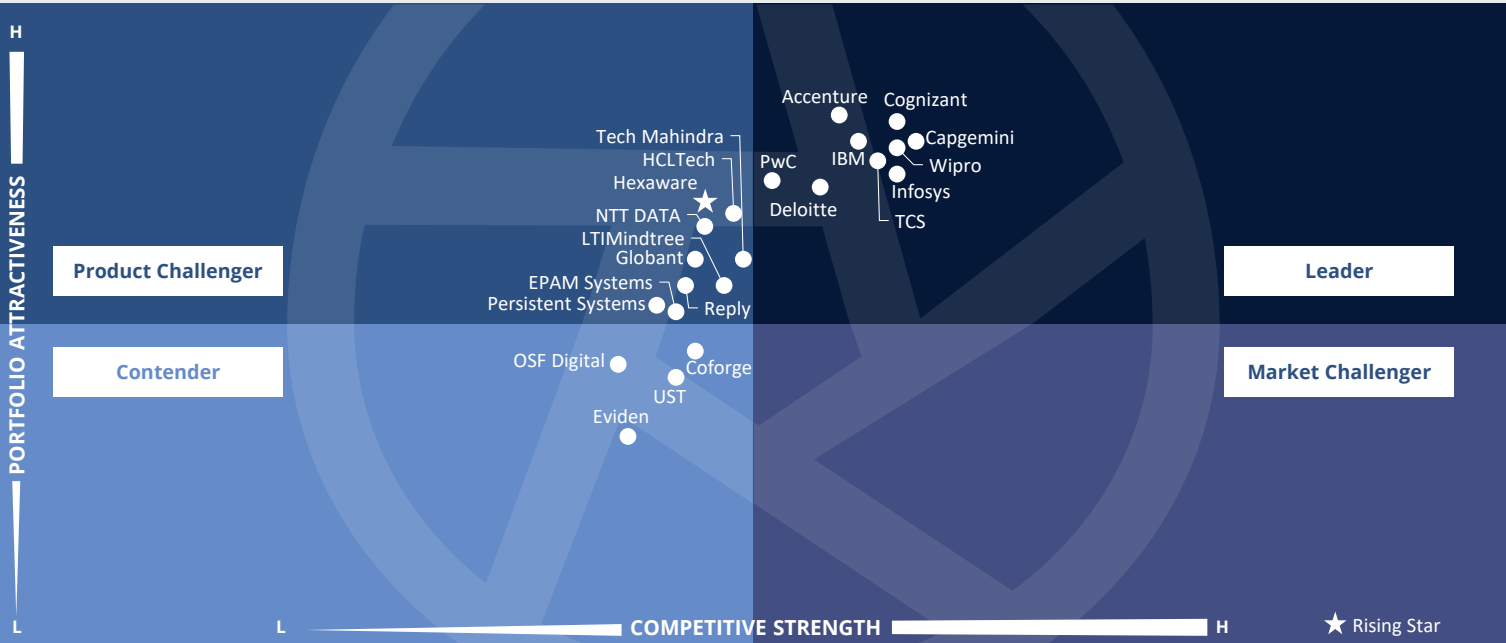
Should read this report to understand how Salesforce providers compare their specific strengths and the areas where they still need improvement.



ISG Provider Lens™
 Salesforce Ecosystem Partners
 Implementation Services for Industry Clouds

Source: ISG RESEARCH

U.K. 2025



This quadrant assesses **implementation service** providers that focus on the **industry cloud products of Salesforce**. It also evaluates their ability to develop **specialist solutions** that target **industry-specific use cases**.

Author Name



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 specialised 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 verticalisation highlights the importance of these capabilities in new implementations.

Implementation services include process consulting for workflow optimisation, custom solution design, system configuration, data cleanup, data migration and go-live support for specialised 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 organisations 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 client
6. **Compelling list of use cases and references**



Implementation Services for Industry Clouds

Observations

Salesforce's expansion into industry clouds is becoming more defined. Some companies are adopting a microsegmentation strategy and leveraging longstanding partnerships with Vlocity to develop targeted proprietary assets for vertical-related use cases. A few others are building robust industry cloud capabilities with multiple technologies and using this knowledge to extend Salesforce industry cloud solutions. Some partners have capitalised on the opportunity to codevelop industry clouds such as Automotive or Life Sciences Cloud by closely collaborating with Salesforce and incorporating their proprietary assets. These strategies are not exclusive, as various permutations are observed in the partner ecosystem.

The industry is witnessing significant advancements driven by AI integration and sector-specific solutions. Salesforce's introduction of Industries AI, with over 100 prebuilt, customisable AI capabilities, is transforming how businesses operate across

15 industry clouds. This innovation is enabling companies to address unique challenges and streamline operations more effectively.

Leaders from 2024 have retained their positions; however, their relative positions have shifted due to market success and the pace of innovation resulting from the implementation of the mentioned strategies. PwC has enhanced its portfolio attractiveness and earned the recognition of a Leader this year, while Hexaware has become the Rising Star, showcasing robust growth and innovative solutions.

From the 52 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders and a Rising Star.



Accenture excels in designing and scaling Salesforce solutions across various industries, with a notable focus on codeveloping the Life Sciences Cloud with GenAI to accelerate clients' journeys towards new value and growth.



Capgemini's Customer Engine for Salesforce Auto Cloud™ and AI-powered CX solutions for industry clouds demonstrate its innovative approach to enhancing CX and operational efficiency across multiple sectors.



Cognizant holds Financial Services and Health Cloud certifications. It leverages its deep industry expertise to deliver AI-powered solutions and industry-specific frameworks that drive digital transformation.



Deloitte Digital is a prominent Salesforce partner with strong industry credentials, offering sector-focussed solutions such as FSConnect and Cloud4M and integrating AI capabilities into the DigitalMIX suite for comprehensive multicloud implementations.



IBM, a pioneer in AI and industry-specific cloud solutions, collaborates with Salesforce to integrate AI-powered experiences and offer tailored solutions across various industry clouds to enhance customer engagement and operational efficiency.



Infosys provides industry-specific solutions and leverages innovative technologies such as AI and ML through Infosys Cobalt to accelerate digital transformation and cloud journeys, ensuring effective client outcomes.



PwC has strengthened its market position by enhancing its portfolio attractiveness and showcasing significant industry cloud implementations, earning its leadership position in this quadrant.



Implementation Services for Industry Clouds



TCS' Crystallus™ framework and significant investments in AI and automation technologies enable rapid digital transformation across key sectors, with a strong focus on integrating Salesforce industry cloud solutions.



Wipro emphasises AI-powered solutions and comprehensive multicloud expertise, delivering tailored industry-specific offerings that enhance digital engagement and operational efficiency for clients.

HEXAWARE

Hexaware (Rising Star) has demonstrated its robust growth and innovative solutions in industry-specific cloud transformation, particularly in the financial services and healthcare sectors.



Cognizant



“Cognizant strategically organises itself vertically, facilitating impactful discussions with customers on domain-specific topics. It has launched over 10 industry-specific solutions with a strategic focus on AI.”

Roman Pelzel

Overview

Cognizant is headquartered in New Jersey, US. 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 has one of the fastest-growing Salesforce practices worldwide and vast capabilities across Salesforce industry clouds. Its Salesforce practice in the EMEA region is based in the UK and comprises over 340 certified Salesforce professionals. Cognizant’s end-to-end Salesforce transformation services, spanning strategy, implementation and managed services, enable seamless integration, operational resilience and AI-powered decision-making.

Strengths

Leaders in industry clouds: Cognizant holds the top position globally in Financial Services Cloud certifications and ranks second in Health Cloud certifications. The company has a dedicated Salesforce industry cloud CoE and continuously invests in innovation and thought leadership. It has successfully launched over 10 function-specific solutions across various segments, including automotive, retail, healthcare, insurance, banking, transportation and hospitality.

Advancements in the Life Sciences industry cloud: Cognizant leverages its life sciences expertise and Salesforce partnership to deliver AI-powered solutions for healthcare and biopharmaceutical companies through automation and modernisation of business processes. Its recently launched

Salesforce Life Sciences Cloud enables personalised patient journeys, improves healthcare providers’ engagement and facilitates data-driven decision-making for enhanced outcomes.

Vertical orientation: Cognizant’s corporate structure aligns with various verticals. Its Salesforce practice has developed 15 industry cloud frameworks and solutions and over 150 industry accelerators. Besides engaging with clients for traditional cloud products, the company executives are frequently involved in business-related conversations on domains such as insurance and mortgage.

Caution

Cognizant has a robust foothold across various KPIs in this quadrant. However, it could focus on potentially increasing the visibility of its dedicated case studies, demonstrating some of the most significant implementations of industry clouds.





Appendix

The ISG Provider Lens 2025 – Salesforce Ecosystem Partners study analyzes the relevant software vendors/service providers in the U.K. 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.

Co-Author



Sonam Chawla
Lead Analyst

Sonam Chawla is a lead analyst at ISG, specializing in co-authoring and supporting Provider Lens™ studies on the Microsoft, Google, and Oracle ecosystems. With around seven years of experience in the market research industry, she has developed strong expertise in insight generation, market analysis, secondary research, report writing, blog creation, and company analysis. Her key areas of interest include hyperscalers, infrastructure technology, digital workplaces, and enterprise collaboration. In her current role, Sonam also contributes to the research process by authoring Focal

Points, Enterprise Context and Global Summary reports, providing valuable insights into regional and global market trends. Additionally, she manages custom engagement requests from providers and advisors. Before taking on this role, Sonam worked as a research analyst, where she was responsible for developing syndicated research reports and providing consulting services for various research projects.



Author & Editor Biographies



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](#).

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

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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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