

Salesforce Ecosystem Partners

A research report comparing strengths
and advantages of Salesforce partners



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Introduction

The Salesforce Ecosystem study will examine various offerings of the Salesforce platform, categorized into implementation services (the change business) and managed application services focusing on operational support for productive applications (the run business). Based on the target clients, these segments have been further categorized into large enterprises and the midmarket. This categorization is particularly significant due to the substantial demand for Salesforce integration into the complex application landscape of large enterprises. Furthermore, large enterprises primarily have globally operating businesses that require corresponding delivery capabilities from service providers.

Expanding on the segmentation outlined above, the study will also include quadrants examining focused offerings, which are the sweet spot for a large pool of participants within the ecosystems and are sought after by clients. As a yearly investigation, running for the seventh consecutive year, this annual study is constantly updated to reflect Salesforce's year-over-year innovations,

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



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

Simplified Illustration Source: ISG 2024



Definition

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.



AI-powered Multicloud Implementation Services – Large Enterprises

Definition

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

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

These services focus on process consulting, custom solution design, system configuration, legacy system migration and go-live support. They also include data cleanup, orchestration and AI and ML enablement to improve business accuracy and efficiency. In conclusion, this quadrant is vital for enabling large, global enterprises to harness the full potential of Salesforce applications, aligning their systems optimally to achieve operational excellence and remain competitive in their respective markets.

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go-live support**) across all Salesforce products
2. **Deep knowledge** of the major standard software packages other than Salesforce, along with the ability to implement **end-to-end processes**
3. Broad **competencies in architecture** and realization of complex application landscapes
4. Expertise in the **design and delivery of AI and ML** capabilities, leveraging multiple data sources as part of multicloud implementations
5. Availability of **predefined solutions** and accelerators, preferably both functionally oriented and industry-specific
6. Delivery **capabilities at scale** to serve large enterprise clients
7. Compelling list of **use cases and references**



Implementation Services for Core Clouds and AI Agents – Midmarket

Definition

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

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

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

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

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go-live support**) for Salesforce Core Clouds such as Sales Cloud, Service Cloud and Commerce Cloud
2. Provision of **training and enabling client personnel** to use the application
3. Availability of **predefined solutions** and accelerators, preferably both functionally oriented and industry-specific
4. Presence of **unique differentiators** such as Agentforce demonstration capabilities
5. Economic stability and significant **delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**



Implementation Services for Marketing and Commerce with AI Enablement

Definition

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

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

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

Eligibility Criteria

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



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, centralized management of Salesforce applications, meticulous data quality management and security and compliance-related aspects.

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

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

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

Eligibility Criteria

1. Well-proven experience in operational support for end-to-end processes across **complex application landscapes**, with a specific focus on Salesforce products
2. Availability of **strong methodology** and comprehensive tool support with a high degree of automation
3. **Delivery capabilities** at scale to serve large enterprise clients
4. Provision of **mature pricing and contract models** with a focus on outcome-based approaches and continuous improvement
5. Compelling list of **use cases and references**



Managed Application Services – Midmarket

Definition

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

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

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

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

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

Eligibility Criteria

1. Well-proven experience in **operational support for application landscapes** with a specific focus on Salesforce products
2. Availability of **strong methodology and comprehensive tool support**, along with a high degree of automation
3. **Economic stability and significant delivery capabilities** to serve numerous clients
4. Provision of **mature pricing and contract models** with a focus on outcome-based approaches and continuous improvement
5. **Compelling list of use cases and references**



Implementation Services for Industry Clouds

Definition

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

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

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

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

Eligibility Criteria

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



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following six quadrants on Salesforce Ecosystem Partners 2025:

Quadrant	Brazil	Germany	U.K.	U.S.
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 research phase falls in the period between October and November 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in April 2025.

Milestones	Beginning	End
Survey Launch	October 24, 2024	
Survey Phase	October 24, 2024	November 25, 2024
Sneak Preview	February 2025	
Press Release & Publication	April 2025	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to the instructions in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Salesforce Ecosystem Partners IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:

ISG.star@isg-one.com



ISG Star of Excellence



The ISG Provider Lens 2024 – Salesforce Ecosystem Partners research study analyzes the relevant software vendors/service providers in the global 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.



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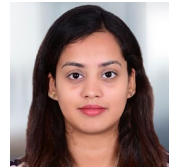
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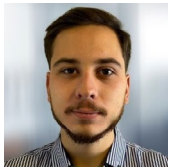
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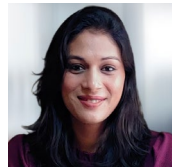
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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

.Monks	Aquilliance*	C&T	Concentrix*
360 Degree Cloud	Assist Digital*	Cadastra*	Credera*
A5*	Atile.Digital*	Capgemini*	CRMIT
ABSYZ	Atlantic Technologies*	CbCloud	Customertimes*
Accelerize	Atrium	CGI*	Daspe Web
Accellor	BearingPoint*	Cloobees*	Datago
Accenture*	Beecloud*	Cloud Consulting Group*	Deloitte*
Ad Victoriam Solutions	Birlasoft*	Cloud for Good	Demand Blue*
adesso SE*	Bluewave*	Cloud Monsters*	Dentsu Creative (Isobar)
Aethereus	Bounteous	CloudGaia	Deutsche Telekom*
Algoworks*	Brighter Cloud*	Cloudity*	Devoteam*
AllCloud*	Brillio*	Coastal Cloud*	Dextara Datamatics
Alot	Brivia	Coforge*	DIA Digital Consulting*
Alscient*	BRQ Digital Solutions*	Cognizant*	Diabsolut
Apps Associates*	Builders*	Cogy	DIGITALL*



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* Rated in previous iteration

dotSource*

Dotsquares*

DP6

DreamExpirience

Driven.CX

DXC Technology*

Eigenherd*

Empaua*

enext*

EPAM*

Everymind*

Eviden*

Factory42*

Fast Slow Motion*

Fujitsu*

Gentrop*

GFT Technologies*

GhFly

Global Hitss

Globant*

Grazitti Interactive*

Grupo CAA

Harpia Cloud

HCLTech*

Hexaware*

Huron*

IBM*

Ília

Ilum:e Informatik*

Impaqtive

Infosys*

iSmartBlue*

Jade Global*

JFOX IT Partners*

Jussi

K2 Partnering Solutions*

Keyrus*

KPMG*

LEOO*

LTIMintree*

Marlabs*

Mastek*

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MATH Group

Merkle*

mindsquare*

Minsaint

Mphasis Silverline*

Multiedro*

Nação Digital*

Nebula Consulting*

NeuraFlash

Nonobyte

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Numen

OSF Digital*

Perficient*

Persistent Systems*

Platform Builders

Pracedo*



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* Rated in previous iteration

Publicis Sapient*
PwC*
R3 Digital*
RafterOne
Reply*
Sabio Group*
Salesfive*
Sercante
Silver Softworks*
Slalom*
Solutis Tecnologias
Sopra Steria*
Sottelli
Spaulding Ridge
SR Consulting*

Sys4B
SysMap*
Tavant*
TCS*
Tech Mahindra*
ThirdEye Consulting*
Torrent Consulting
Twistellar
Uptima
UST*
Valtech*
VASS*
Vera Solutions
Visionet*
Visum Digital*

Vitrio
VRP Consulting*
Westbrook International*
Wipro*
WPP*
XCL Consulting*
Zennify*
Zensar Technologies*



iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

iSG Research™

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

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iSG

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

For more information, visit isg-one.com.





OCTOBER, 2024

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