# Salesforce Pulse 2024: Top Five Service Providers Delivering Superior Value

August 2024

Market Report
Enterprise Platform Services

Everest Group®

# Our research offerings

This report is included in the following research program(s):

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- Cyber Threat Detection and Response
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- Digital Workplace
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- Insurance Information Technology
- Insurance Technology (InsurTech)
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- Intelligent Document Processing
- Interactive Experience (IX) Services
- IT Services Excellence
- IT Talent Excellence
- Life Sciences Business Process
- Life Sciences Commercial Technologies
- Life Sciences Information Technology
- Locations Insider™
- Marketing Services
- Market Vista™
- Microsoft Azure
- Microsoft Business Application Services
- Modern Application Development (MAD)
- Mortgage Operations
- Multi-country Payroll
- Network Services and 5G
- Oracle Services
- Outsourcing Excellence
- Payer and Provider Business Process
- Payer and Provider Information Technology
- Price Genius – AMS Solution and Pricing Tool
- Pricing Analytics as a Service
- Process Intelligence
- Process Orchestration
- Procurement and Supply Chain
- Recruitment
- Retail and CPG
- Retirement Technologies
- Revenue Cycle Management
- Rewards and Recognition
- SAP Services
- Service Optimization Technologies
- Software Product Engineering Services
- Supply Chain Management (SCM) Services
- Sustainability Technology and Services
- Talent Genius™
- Technology Skills and Talent
- Trust and Safety
- Value and Quality Assurance (VQA)

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- Benchmarking
- Contract assessment
- Peer analysis
- Market intelligence
- Tracking: providers, locations, risk, technologies
- Locations: costs, skills, sustainability, portfolios

 

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# Introduction and overview

Research Methodology

Background of research

Scope of research

# Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

## 01 Robust definitions and frameworks

Function-specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

## 02 Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

## 03 Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests

## 04 Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

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Proprietary contractual database of 3,000+ enterprise platform services contracts (updated annually)

Year-round tracking of 30+ services providers

Large repository of existing research in enterprise platform services

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

# This report is based on key sources of proprietary information

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

**Providers assessed[1,2]**

Accenture, Capgemini, Coforge, Cognizant, Deloitte, DXC Technology, Eviden, Globant, Grazitti Interactive, HCLTech, IBM, Infosys, Jade Global, LTIMindtree, Mastek, Mphasis, NTT DATA, OSF Digital, Persistent, TCS (Tata Consultancy Services), Tech Mahindra, West Monroe, Wipro, YASH Technologies

1 Assessments for Accenture, Deloitte Digital, IBM, and Globant exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
2 Analysis for Capgemini, DXC Technology, and West Monroe is based on partial inputs provided
The source of all content is Everest Group unless otherwise specified
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion

# Introduction

Over the past few years, Salesforce has transformed from a CRM platform to a comprehensive suite empowering enterprises. The focus shifted toward a unified customer view with Einstein Analytics and Customer 360, while industry-specific cloud solutions served diverse needs. The integration of AI and ML further boosted its automation, personalization, and data analytics capabilities. The acquisition of Slack further streamlined communication and collaboration.

Looking ahead, Salesforce is poised to empower enterprises further with its enhanced focus on data and AI, with the recent launch of focused products such as Data Cloud and the Einstein 1 platform. These aim to meet the AI-specific objectives of enterprises in the short and long term, while making significant advances in the generative AI space. The launch of SMB-focused products such as Starter and Pro Suites showcases its commitment to serving a new customer base while enhancing its enterprise footprint. The constant push for multi-cloud, industry clouds, and ecosystem partnerships to meet enterprises' dynamic needs is charting a course for hyper-efficiency and responsible innovation, ensuring enterprises thrive in the ever-evolving technological landscape with sustainability at the core.

With distinct enterprise demands and an evolving Salesforce landscape, service providers are investing in scaling their industry-specific and generative AI-specific talent pool, forging partnerships with Salesforce on AI and solutioning, and developing differentiated IP and assets to augment enterprise transformation journeys.

This research provides insights into the value delivered, including enterprises' satisfaction for Salesforce services across key parameters, and identifies the top five service providers that have delivered superior value for enterprises.

The assessment is based on over 60 unique interviews conducted in 2023-24 with enterprises globally as part of the enterprise platform services. These enterprises were nominated as reference clients by different service providers and studied across Salesforce Services PEAK Matrix® 2024 evaluations.

## Scope of this report

**Geography:** Global

**Services:** Salesforce services

# Scope of the research

## Salesforce services Pulse Report 2024

### Consulting/assessment services

Product(s) selection, feasibility, and readiness assessments, roadmap formulation, compliance assessment, compliance strategy development, security assessment, governance strategy development, process analysis, process (re)design, change management, and strategy development

### Implementation services

Requirements gathering, technical and functional design, configuration and integration design, identify and map data conversions, workload(s) integration, system configurations, process configurations, customizations, configure pre-built connectors, testing, and deployment

### Management and monitoring services

Helpdesk, incident management, service requests management, issue resolution, customizations, integrations, testing, service governance, documentation, update support, enhancements, patch updates, and bug fixes

**Salesforce services**

### End-point security

- IT services delivered for all Salesforce-owned and acquired applications including the following but not limited to:
  - Key products: Sales Cloud, Marketing Cloud, Commerce Cloud, MuleSoft, Tableau, Slack, Data Cloud, Einstein 1 platform, AI Cloud, Starter Suite, Net Zero Cloud, and applications hosted on Salesforce AppExchange
  - Industry clouds, PDO/AppExchange, and others
- Includes applications, databases, middleware, analytics, SI-built solutions, and emerging technologies such as AI/ML and IoT
- Activities including business/technology consulting, design and implementation, integration, and support services for Salesforce applications (as per the above services definition)

### Network security

This PEAK Matrix® assessment does not cover:

- BPO services (running business processes on Salesforce)
- IT infrastructure-related services
- Resale of licenses related to Salesforce applications

# Enterprises' pulse assessment

Executive summary

Enterprises' sourcing criteria

Enterprises' satisfaction across key parameters

# Executive summary

**Enterprises are satisfied** with the providers' domain expertise, account management, and their pricing and commercial flexibility.

Enterprises are not just satisfied by run-of-the-mill services; instead, they expect their service providers to bring **value-add and innovation** with their IP, solutions, and thought leadership through different phases of the Salesforce engagement.

There is a growing importance of **utilizing emerging technologies** such as AI/ML, generative AI, and IoT to accelerate business value; however, the satisfaction among enterprises remains low.

Enterprises looking for large Salesforce transformations are preferring service providers that can offer robust **Organizational Change Management (OCM)** capabilities.

With the rise in demand for **industry-specific offerings** and the increasing maturity of industry clouds from Salesforce, the demand for industry-specific talent and expertise has increased in the market.

# Overall enterprise satisfaction with Salesforce services is good; however, providers should enhance their focus strategically to differentiate themselves

**Enterprises' overall satisfaction with service providers**[1]
2023; percentage

100% = 60+


Overall satisfaction was notably higher with providers emphasizing **consulting-led delivery**. Additionally, **niche providers** stood out for their superior client satisfaction, driven by their **specialized technical knowledge and successful product-roadmapping strategies**.

1 Satisfied: a satisfaction rating of 8 or above; not satisfied: a satisfaction rating below 8 (out of 10)

# While service providers did well on domain expertise and account management, they have some ground to cover on emerging technology capabilities and overall value add and innovation

**Percentage of enterprises satisfied on key dimensions[1]**
2023; percentage

- **90%** Domain expertise
- **82%** Account management
- **81%** Pricing and commercial flexibility
- **79%** Talent management
- **76%** Organizational change management
- **75%** Consulting capabilities
- **67%** Value add and innovation
- **55%** Emerging technology capabilities

- While service providers offer robust domain expertise, enterprises are seeking greater value from their Salesforce investments; service providers are intensifying efforts in offering innovative IP, solutions, and flexible pricing constructs
- Service providers need to ramp up their investments in skilling their employees on emerging technologies such as generative AI, blockchain, and IoT in line with increased investments from enterprise platforms and increased demand from enterprises in such areas
- Service providers are expected to take on a more strategic partner role rather than being a pure-play implementation partner. This includes charting out a well-laid implementation- and future- roadmap, while supporting the enterprises' broader set of objectives such as customer satisfaction, employee satisfaction, and sustainability

1 Satisfied: a satisfaction rating of 8 or above; not satisfied: a satisfaction rating below 8 (out of 10)

# Salesforce service provider landscape

Assessment methodology

Top 5 Salesforce service providers delivering superior value

What enterprises' think of individual service providers

# To identify the top service providers, Everest Group assessed 24 key service providers delivering Salesforce services

## Featured service providers

accenture, Capgemini, Coforge, cognizant, Deloitte., DXC Technology, EVIDEN, Globant, Grazitti Interactive, HCLTech, IBM, Infosys, JADE Global, LTIMindtree, Mastek, Mphasis, NTT DATA, OSF Digital, Persistent, TCS (Tata Consultancy Services), Tech Mahindra, West Monroe, wipro, YASH Technologies

## Platform covered

salesforce

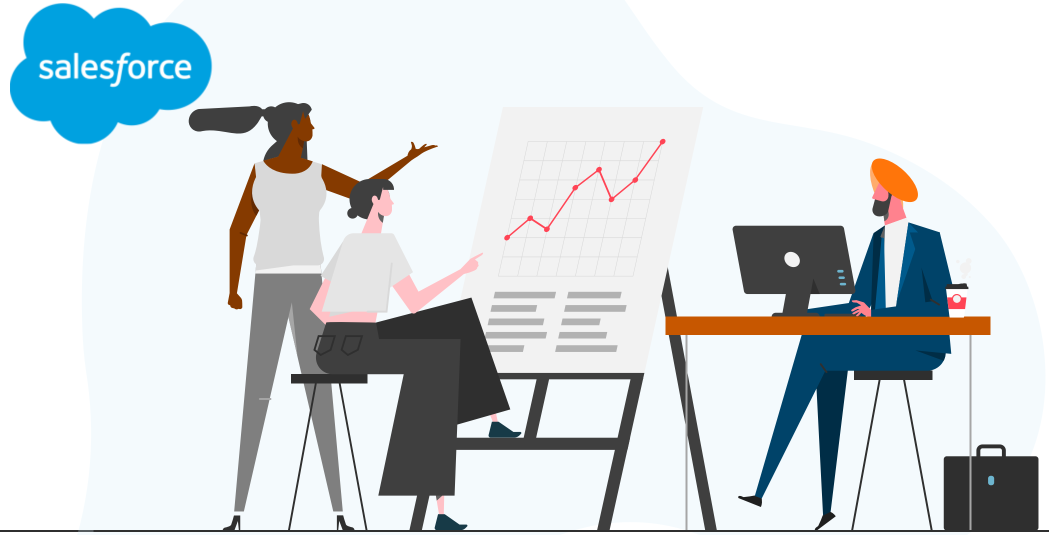
Note: The assessment considers the PEAK Matrix® assessments of Salesforce Services
Featured service providers include only those providers that have been finally positioned on the respective PEAK Matrix® assessments

# We assessed all the service providers across parameters such as client satisfaction, transformational proof points, and awards and recognitions

| Evaluation parameters | Client satisfaction | Transformational proof points | Awards and recognitions |
|---|---|---|---|
| Evaluation criteria | We conducted focused client reference discussions to understand the clients' perception around:<br>• Overall satisfaction and rating across dimensions<br>• Likeliness to recommend the service provider's services to others and future engagement plan | We assessed the 200+ transformational case studies across the following:<br>• Complexity of the case study in terms of scope of services, geographical coverage, and product spectrum<br>• Overall business outcomes and value delivered to the enterprises<br>• Value delivered through differentiating IP tools/solutions, niche partnerships, CoE/labs, etc. | We analyzed platform-specific awards and recognitions received by the service provider from the respective technology provider, including:<br>• Salesforce partner innovation awards<br>• MuleSoft global and regional awards<br>• Industry-specific awards<br>• Awards for IP tools/solutions |

Note: The assessment considers the PEAK Matrix® assessments of Salesforce Services
Featured service providers include only those providers that have been finally positioned on the respective PEAK Matrix® assessments

# Top 5 Salesforce service providers delivering superior value




Grazitti Interactive® Marketing for Digital Natives

Infosys

NTT DATA

Persistent

tcs TATA CONSULTANCY SERVICES

Note: The assessment considers the PEAK Matrix® assessments of Salesforce Services
Featured service providers include only those providers that have been finally positioned on the respective PEAK Matrix® assessments

# What enterprises think of top 5 Salesforce service providers delivering superior value

| Strengths | | Limitations |
|---|---|---|
| • Pricing and commercial flexibility<br>• Project management | Grazitti Interactive – Marketing for Digital Natives | • Innovation and value addition<br>• Talent management |
| • Collaboration<br>• Dependability | Infosys | • Proactive innovation<br>• Best practices |
| • Domain expertise<br>• Depth of knowledge | NTT DATA | • Emerging tech capabilities<br>• Project communication |
| • Technical expertise<br>• Flexibility | Persistent | • Attrition<br>• Resource mapping |
| • Technical and domain expertise<br>• Flexibility | TCS – Tata Consultancy Services | • Documentation<br>• Independent decision-making |

# Appendix

Glossary

Research calendar

# Glossary of key terms used in this report

| | |
|---|---|
| Account management | Account management refers to the process of managing relationships with specific customers and the management of sales and customer satisfaction of an organization's existing customers |
| CoE | A center of excellence |
| Domain expertise | The knowledge of industry dynamics and the ability to understand the broader business functionality of IT applications |
| Emerging tech capabilities | Emerging tech capabilities refer to the potential of new and innovative technologies that are still in their development or early adoption stages but have the potential to significantly impact various industries and society at large |
| Geographical expansion | Geographical expansion refers to the strategy of extending a company's operations or presence to new regions or countries |
| Organizational change management | Organizational change management refers to managing the effect of new business processes, changes in organizational structure, or cultural changes within an enterprise |
| Pricing | The ability to correctly price services with an appropriate level of outcome ownership |
| Talent management | The ability to rightly map resources as per project requirements; it also includes striking the right balance between offshore and on-site resources and attrition levels |
| Technical expertise | The technology vendor's ability to understand client requirements and translate them into an IT application using various software technologies |
| Value add and innovation | Innovation could be in the form of additional benefits to the client, over and above those contractually committed in the scope of work or the use of innovative processes and technologies to improve client outcomes |

# Research calendar

## Enterprise Platform Services

Published    Current release    Planned

| Reports title | Release date |
|---|---|
| Oracle Cloud Applications Services PEAK Matrix® Assessment 2023 | July 2023 |
| Microsoft Dynamics 365 Services – Provider Compendium 2023 | July 2023 |
| Enterprise Platform Services: Voice of the Customer 2023 | August 2023 |
| Salesforce Services – Unpacking Salesforce Industry Cloud Growth Momentum | September 2023 |
| Oracle Cloud Applications Services – Provider Compendium 2023 | October 2024 |
| Pega Services PEAK Matrix® Assessment 2023 | February 2024 |
| SAP Business Application Services for Mid-market Enterprises PEAK Matrix® Assessment 2024 | April 2024 |
| Oracle Cloud Applications (OCA) Services – Cloud ERP as a Catalyst to Enterprise AI Adoption | April 2024 |
| SAP Business Application Services Pulse 2024: Top Five Service Providers Delivering Superior Value for Mid-market Enterprises | June 2024 |
| Salesforce Services PEAK Matrix® Assessment 2024 | July 2024 |
| Microsoft Dynamics 365 Services – State of the Market | July 2024 |
| Salesforce Services Pulse 2024: Top Five Service Providers Delivering Superior Value | August 2024 |
| Salesforce Services – Provider Compendium 2024 | Q3 2024 |
| SAP Business Application Services – Global PEAK Matrix® Assessment 2024 | Q3 2024 |
| Microsoft Dynamics 365 Services PEAK Matrix® Assessment 2024 | Q3 2024 |
| Salesforce Services – State of the Market 2024 | Q4 2024 |

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