ISG Provider Lens™

Salesforce Ecosystem Partners

Managed Application Services for Midmarket

A research report comparing provider strengths, challenges, and competitive differentiators

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Executive Summary

Report Author: Rainer Suletzki

Since its founding in 1999, Salesforce has shown impressive growth and is now one of the leading providers of cloud-based application systems in the form of Software as a Service (SaaS). The focus was always on implementation using agile methods and a high degree of standardization, giving the company the opportunity to roll out updates at comparatively short intervals.

Salesforce has continued steady growth in recent years, and the restrictions imposed by the COVID-19 pandemic have only had a limited impact on the pace of growth. Although a few project budgets were partially frozen, or the corresponding projects were temporarily put on hold, in general the market growth was not significantly affected. In some areas, the increasing relocation of processes or sub-processes in the direction of online processing has led to additional demand for IT solutions. As Salesforce is functionally largely geared toward customer-related processes, there have been additional growth impulses for the company in these areas during the pandemic.

The high growth also leads to a growing demand for implementation services. Meanwhile, the availability of qualified resources with Salesforce expertise can be seen as a limiting factor for the number of implementations. Specifically, in the U.S., this has resulted in significant consolidation pressure in the market for corresponding services, with large system integrators in particular trying to expand their resource base by taking over other providers. As a result, the number of midsize providers that offer complete scope coverage in the U.S. has shrunken

Strong growth in demand for **Salesforce services and the resulting** challenges for the vendors.

significantly. It will be interesting to see if the few remaining providers will stay independent over the upcoming years, or if new players of this will emerge. In addition to these takeover activities, which ultimately do not generate any additional capacities in the market, many providers are focusing on increased recruiting. On the one hand, young talents are hired and trained to become Salesforce consultants through suitable qualification measures. On the other hand, within some companies, experienced consultants from other areas are requalified to become Salesforce experts. The large system integrators follow this path due to the lack of opportunities for additional growth by acquisitions. In its partnerships, Salesforce itself promotes companies that contribute significantly to additional implementation capacities.

It is worth noting here that Salesforce is also currently building up its own offering of implementation services. Following the acquisition of the midsized provider Acumen, the company is further expanding its own capacities and is also partnering with other providers to implement Salesforce for several customers. This opens additional opportunities for these providers, but also inherits the risk of growing dependence on Salesforce. Furthermore, it is not yet possible to conclusively assess how sustainable the expansion of Salesforce's own development capacities will be, because as a software business, it requires significant investments and usually has lower margins.

Another key trend is the alignment of the Salesforce offering to different industries. This started a few years ago with the launch of industry-specific products like the Financial Services Cloud and the Health Cloud. In 2020, this focus was intensified with the acquisition of Vlocity, an independent software vendor (ISV) that to date has developed various industry-specific products based on the Salesforce platform. It appears that this is a sustained trend and that Salesforce's portfolio is continually evolving toward an increased focus on industries. It remains to be seen whether this will lead to restrictions in the functional further development of such classic products as Sales and Service Cloud over the next 12 to 24 months.

In terms of the implementation methods used, the hybrid agile model remains the most common approach for globally operating customers, for whom the integration of Salesforce into a complex system landscape with global operations is a mandatory requirement. The hybrid agile model is a combination of agile elements for the implementation phases with phase-oriented elements related to strategy, design and rollout. Most providers now offer this type of methodology in their portfolios. The purely agile methodology is still suitable for a single implementation of Salesforce; it is primarily used by midsized customers that do not require a global rollout and have limited integration requirements.

When it comes to integrating Salesforce with other applications, the MuleSoft platform continues to be the dominant tool. Comprehensive competence with regard to this platform is now an essential requirement to be able to survive in the market for providers of Salesforce implementations. The large system integrators usually operate a dedicated MuleSoft practice of considerable size, in which the corresponding capacities are bundled.

For all vendors, whether they are systems integrators or boutique vendors, a strong network of ISV partnerships within the Salesforce ecosystem remains of great importance. There is still a significant need to cover requirements that go beyond the standardized range of functions of the Salesforce products with additional products. This applies not only to the implementation, but also to the subsequent continuous support of ongoing operations. To be able to avoid individual developments as far as possible in these cases, the products of the ISVs are used. These solutions are typically offered as independent products, licensed separately and made available through a Salesforce-powered portal called the AppExchange Store. Salesforce ensures that the individual apps meet the basic software quality requirements, including troubleshooting, maintenance cycles, compatibility with Salesforce products, etc.

In this year's study, the quadrant for implementation and integration for large customers was renamed "Multi-Cloud Implementation and Integration for Large Enterprises" to make the difference to the quadrants for the midmarket even clearer in terms of content. The definition of this quadrant remains unchanged. Furthermore, the support of global rollouts and the coverage of the complex integration requirements are key success factors for providers in this quadrant. The companies Accenture, Capgemini, Cognizant, Customertimes, Deloitte Digital, HCL, Infosys, Mindtree, TCS and Wipro qualified as Leaders this year.

The Implementation Services for Core Clouds Midmarket segment also remains unchanged in terms of content. As already explained, the trend toward consolidation has led to several players disappearing from the market in 2021. It can be stated that, in addition to pronounced development skills, the early phases of development, including strategy development, design and planning of a roadmap, have become increasingly important skills for the success of providers in this area. Birlasoft, Coastal Cloud, Hexaware, Persistent Systems, Silverline and Traction on Demand qualified as Leaders this year. As a Rising Star, Brillio has the prospect of qualifying as a leading provider in the future if its positive development continues.

In the Implementation Services for Marketing Cloud Midmarket segment, which also remains unchanged in terms of content, the following providers have qualified for a leading position this year: Coastal Cloud, Dentsu, Persistent Systems, Silverline, Slalom and Traction on Demand.

The market for Managed Application Services for Large Enterprises, like the corresponding market for implementations, is largely dominated by the large and internationally operating system integrators. Other players occupy significant sub-areas, but usually remain a bit behind the position of a Leader. Accenture, Capgemini, Cognizant, HCL, Infosys, L&T Infotech, Mindtree, TCS, Tech Mahindra and Wipro were able to qualify for this status.

Although they have favorable cost structures due to their global supplier models, the large system integrators do not play a significant role in the quadrant for Managed Application Services for Midmarket. On the one hand, this is due to the usually lower complexity of requirements in this market, and on the other hand, the companies mentioned do not seem to give this market a high priority. The following companies were able to qualify as Leaders: Birlasoft, Brillio, Hexaware, Persistent Systems, Silverline and Traction on Demand.

Compared to the last year, the structure of this year's study was expanded to include a quadrant dealing with the Implementation Services for Analytics Solutions on Salesforce. For the providers in this still comparatively young segment, there is incomplete information or only little information provided by the companies. As a result, only a few companies could be assessed this year, with the following achieving Leader status: HCL, Infosys, Persistent Systems, Tech Mahindra and Wipro.

In the next few years, the availability of qualified resources and the progressive focus on industry-specific offers will probably have a significant impact on the market for Salesforce-related services. It will also be interesting to follow Salesforce's further positioning steps.

Provider Positioning

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	Multi-Cloud Implementation & Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Cloud Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Analytics Solutions on Salesforce
Accenture	Leader	Not In	Not In	Leader	Not In	Not In
AllCloud	Not In	Product Challenger	Product Challenger	Not In	Market Challenger	Not In
Atos	Product Challenger	Not In	Not In	Product Challenger	Not In	Contender
Birlasoft	Not In	Leader	Not In	Not In	Leader	Not In
Brillio	Not In	Rising Star ★	Product Challenger	Not In	Leader	Not In
Capgemini	Leader	Not In	Not In	Leader	Not In	Not In
CGI	Contender	Not In	Not In	Contender	Not In	Not In
Coastal Cloud	Not In	Leader	Leader	Not In	Not In	Product Challenger
Coforge	Not In	Product Challenger	Contender	Not In	Contender	Not In

Provider Positioning

	Multi-Cloud Implementation & Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Cloud Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Analytics Solutions on Salesforce
Cognizant	Leader	Not In	Not In	Leader	Not In	Not In
Customertimes	Leader	Not In	Not In	Product Challenger	Not In	Product Challenger
Deloitte Digital	Leader	Not In	Not In	Market Challenger	Not In	Not In
Dentsu	Not In	Not In	Leader	Not In	Not In	Not In
EPAM	Contender	Not In	Not In	Contender	Not In	Not In
Fujitsu	Contender	Not In	Not In	Contender	Not In	Not In
Grazitti Interactive	Not In	Product Challenger	Not In	Not In	Product Challenger	Product Challenger
HCL	Leader	Not In	Not In	Leader	Not In	Leader
Hexaware	Not In	Leader	Product Challenger	Not In	Leader	Not In

Provider Positioning

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	Multi-Cloud Implementation & Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Cloud Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Analytics Solutions on Salesforce
Huron	Not In	Market Challenger	Market Challenger	Not In	Market Challenger	Not In
IBM	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In
Infosys	Leader	Not In	Not In	Leader	Not In	Leader
Jade Global	Not In	Product Challenger	Product Challenger	Not In	Not In	Not In
LTI	Product Challenger	Not In	Not In	Leader	Not In	Not In
Marlabs	Not In	Product Challenger	Contender	Not In	Product Challenger	Not In
Mindtree	Leader	Not In	Not In	Leader	Not In	Not In
Mphasis	Not In	Not In	Not In	Product Challenger	Not In	Not In
NTT DATA	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In

Provider Positioning

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	Multi-Cloud Implementation & Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Cloud Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Analytics Solutions on Salesforce
Perficient	Not In	Contender	Contender	Not In	Not In	Not In
Persistent Systems	Product Challenger	Leader	Leader	Product Challenger	Leader	Leader
PwC	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In
Reply	Not In	Product Challenger	Product Challenger	Not In	Not In	Not In
Silverline	Not In	Leader	Leader	Not In	Leader	Product Challenger
Slalom	Product Challenger	Not In	Leader	Product Challenger	Not In	Not In
SLK Group	Not In	Contender	Not In	Not In	Not In	Not In
Tavant	Not In	Product Challenger	Contender	Not In	Product Challenger	Not In
TCS	Leader	Not In	Not In	Leader	Not In	Not In

Provider Positioning

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	Multi-Cloud Implementation & Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Cloud Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Analytics Solutions on Salesforce
Tech Mahindra	Product Challenger	Not In	Not In	Leader	Not In	Leader
Traction on Demand	Not In	Leader	Leader	Not In	Leader	Product Challenger
Visionet	Not In	Contender	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Not In	Not In	Leader	Not In	Leader
Zennify	Not In	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Zensar Technologies	Not In	Market Challenger	Market Challenger	Not In	Product Challenger	Market Challenger

This study focuses on what ISG perceives as most critical in 2022 for the Salesforce Ecosystem.

- **Multi-Cloud Implementation & Integration Services for Large Enterprises**
- **Implementation Services for Core Clouds Midmarket**
- **Implementation Services for Marketing Cloud Midmarket**
- **Managed Application Services for Large Enterprises**
- **Managed Application Services for Midmarket**
- **Implementation Services for Analytics Solutions on Salesforce**

Simplified Illustration Source: ISG 2022

Definition

The Salesforce Ecosystem study examines various offerings around the Salesforce platform, where a basic distinction is made between implementation services (the Change Business) and the managed application services focusing on operational support for productive applications (the Run Business). In both these basic segments, a further distinction is made between large enterprise clients and the midmarket due to the significantly higher need for Salesforce integration into the complex application landscape of large enterprise clients. Furthermore, these clients primarily have globally operating businesses that require corresponding delivery capabilities from the service providers.

The ISG Provider Lens™ study offers IT decision-makers the following:

- Transparency of the strengths and weaknesses of relevant providers
- Differentiated positioning of providers by segments
- A perspective on different markets, especially the U.S., 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 leverage information from these reports for evaluating their current vendor relationships and potential engagements.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following 6 quadrants: Multi-Cloud Implementation & Integration Services for Large Enterprises, Implementation Services for Core Clouds Midmarket , Implementation Services for Marketing Cloud

Midmarket, Managed Application Services for Large Enterprises Managed Application Services for Midmarket, and Implementation Services for Analytics Solutions on Salesforce.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on regional market

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

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$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 US$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger, and Contender), and the providers are positioned accordingly.

Each ISG Provider Lens quadrant may include a service provider(s) that ISG believes has strong potential to move into the Leader quadrant. This type of provider is classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Managed Application Services for Midmarket

Who Should Read This

This report is relevant to small and midsize enterprises across all industries in the U.S. and evaluates service providers of Salesforce managed application services for this client type.

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

To skillfully manage their Salesforce environment, enterprise clients look for service providers that can keep IT costs under control and maintain the platform efficiently.

Enterprises need service providers to manage the application, licenses and upgrades and provide user support and develop business applications integrated with the Salesforce environment. ISG notes that service providers are helping their clients by providing cost management for the application, planning upgrades, conducting regular training programs and expanding the use of Salesforce within an organization.

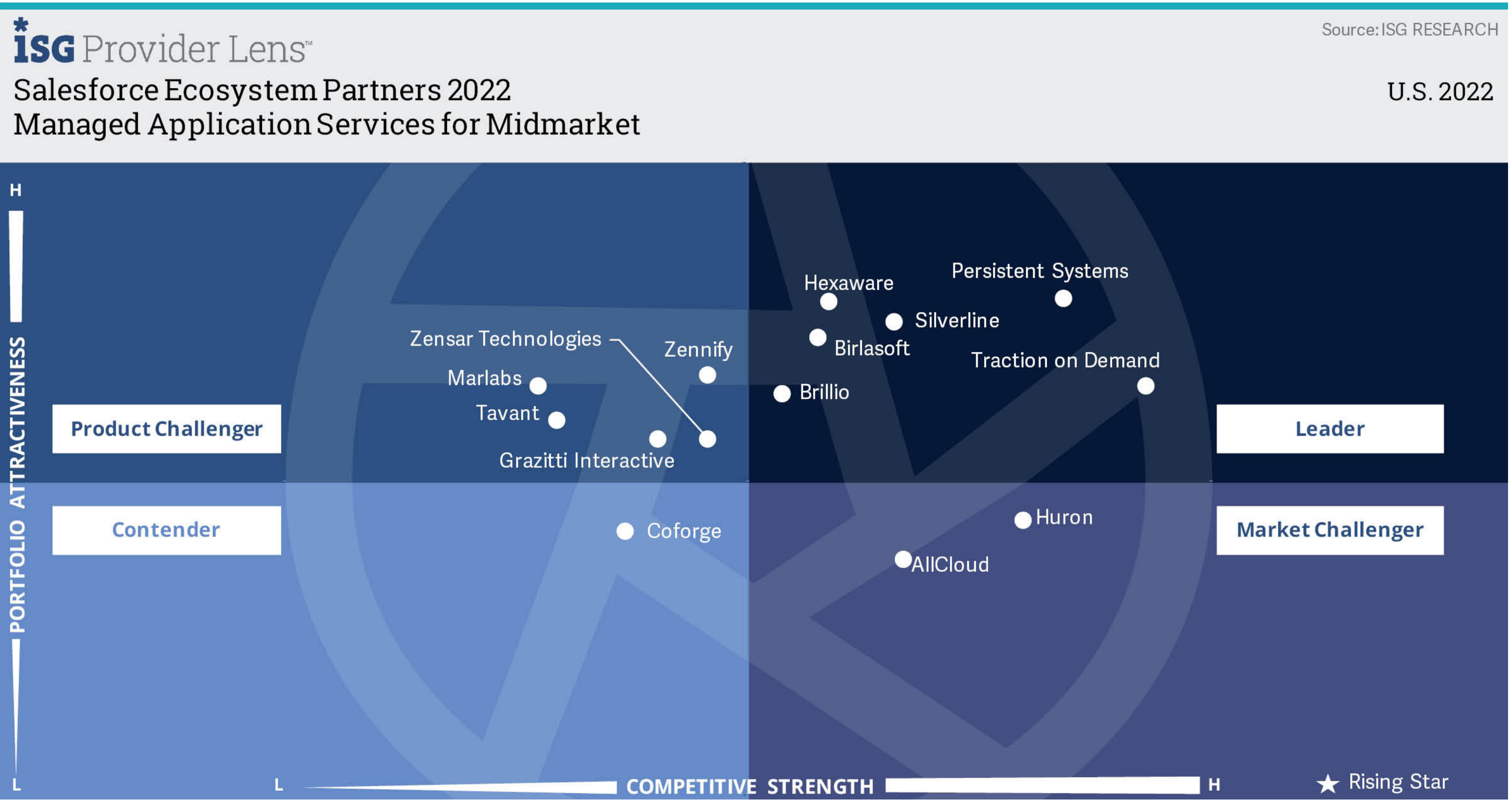
The midmarket in the U.S. can leverage the midsize providers, as they are easier to negotiate with and are gaining a considerable number of midmarket clients because of their prices and proximity to a client's site of operation. Clients that seek onshore managed services have the option of soliciting the services of any qualified midsize service provider. All service providers must aim for high user satisfaction to sustain or encourage the use of Salesforce applications and justify the investments in Salesforce managed services providers.

Marketing, sales and field services leaders should read this report to understand the relative positioning and capabilities of service providers that can help implement Salesforce managed application services effectively. The report also highlights the advanced managed service capabilities of service providers, including administration assistance, development and use of accelerators, Salesforce Lightning services, proactive monitoring, and advisory services.

IT and technology leaders should read this report to understand the relative positioning and capabilities of service providers of managed services. The report also compares the technical capabilities of these providers in areas such as remote and onsite monitoring, technology accelerators, incident response, automation, and development methodologies.

Security and data professionals should read this report to understand how the providers comply with data privacy and security requirements in the U.S. in their Salesforce managed application service practices.

Procurement professionals should read this report to understand how the providers differ in their approach toward Salesforce managed application services in the U.S. The report covers differences in experience in terms of Salesforce applications, nature of customer base and industry relations.



This quadrant assesses the capability of providers to offer **managed services for Salesforce applications**, mainly for **midmarket clients**, which, in many cases, have a more regional focus.

Rainer Suletzki

Definition

This quadrant focuses on the capability of providers to offer managed services for maintenance and support functions that include monitoring, remote support, centralized management of Salesforce applications, data quality management, data security, and compliance-related aspects. The midmarket clients usually require lower integration aspects, and, in many cases, have a more regional focus.

Eligibility Criteria

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

Observations

The managed application services focused on SaaS products like Salesforce are from a functional perspective less complex than for traditional on-premise products, since a large part of the application management is conducted by the software vendor Salesforce itself. Specifically, all the platform-related aspects such as database management or performance management are covered by Salesforce. The main components that are conducted by service providers are upgrade support, data volume and license management, user training and, where needed, the managememnt of various interfaces. Due to this limited scope some of the midmarket providers focus on offering implementation services and do not put high emphasis on the managed application services business.

From over 90 companies assessed for this study, 14 have qualified for this quadrant with 6 being Leaders:

Birlasoft

Birlasoft offers the entire spectrum of application support activities for Salesforce. Service efficiency is driven by applying powerful tool support for the management of Salesforce applications.

Brillio

Brillio offers a comprehensive solution for the continuous optimization of Salesforce instances. A key element in the application management offering is the continuous SLA and service performance monitoring.

Hexaware

Hexaware provides complete and outcome-based managed application services for Salesforce, with a focus on automation and service quality. Results can be visualized on a compelling dashboard solution.

Persistent Systems

Persistent Systems offers an impressive portfolio of managed application services around the Salesforce platform and can provide end-to-end services across the client's system landscape, including backend systems.

Silverline

Main characteristic of **Silverline**'s application service portfolio is a well-defined service structure with clear SLA definitions. With the Silverline Navigator, the company provides a compelling governance framework for managed services.

Traction on Demand

Traction on Demand places high emphasis on client enablement by supporting the enhancement of the client's own capabilities. Ensuring data quality as a driver of service quality is another essential part of the approach taken by the company.

Grazitti Interactive

Product Challenger

"With its focus on service quality, Grazitti Interactive is a reliable partner for managing Salesforce instances."

Rainer Suletzki

Overview

Grazitti Interactive is a global provider of SaaS products and digital services, leveraging cloud, mobile and social media technologies. The company was founded in 2008 and has multiple offices in the U.S., Canada, India, Australia and Singapore. It employs more than 250 developers and quality engineers, of which approximately 100 are Salesforce certified.

Strengths

High focus on quality: In its application management activities, Grazitti Interactive prioritizes quality of service and process within the respective applications. Its sophisticated testing approach ensures reliable conformity of implemented processes to underlying specifications.

Efficiency through automation: Grazitti Interactive applies enhanced automation technologies to achieve high efficiency in its application management engagements. Examples include the automated release to repository and deploy to production steps within the continuous integration approach for application maintenance.

Strong governance model: In application management engagements Grazitti Interactive gives much importance to governance in accordance with the respective clients. The important components of such engagements are requirements management, quality audits and guidance by leveraging proven best practices.

Caution

Grazitti should further enhance its capabilities of managing end-to-end processes across different software components, including backend systems.

The continuous monitoring of business processes should be given more consideration in the company's portfolio.

Appendix

The ISG Provider Lens 2022 – Salesforce Ecosystem Partners research study analyzes the relevant software vendors/ service providers in the U.S. 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 report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of January 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Salesforce Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Author

Rainer Suletzki
Analyst

Rainer Suletzki brings more than 30 years of experience in various IT Management functions within a global German Life Science corporation. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution. Currently he acts as independent consultant in various projects at ISG with focus upon application management for SAP, specifically for SAP HANA, and for Salesforce. This includes ISG Provider Lens Studies as well as various projects supporting companies in defining IT strategies and the corresponding sourcing decisions.

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Sidhanth is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Digital workplace, retail software and services and healthcare and life sciences digital transformation services. His area of expertise lies in ecommerce, future of workplace and virtual care. During his tenure, he has developed content from an enterprise perspective and authors the global summary report.

IPL Product Owner

Jan Erik Aase

Partner and Principal Analyst

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 Provider Lens™

MARCH, 2022

REPORT: SALESFORCE ECOSYSTEM PARTNERS