ISG Provider Lens™

Salesforce Ecosystem Partners

Managed Application Services – Midmarket

A research report comparing provider strengths, challenges and competitive differentiators

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QUADRANT REPORT | APRIL 2025 | U.S.

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Access to cross-enterprise data, innovation with AI and focus on value drive Salesforce implementation

On the Path to Becoming a $50 Billion Revenue Company: **Navigating Challenges** Salesforce continues on its path to becoming a company with revenues equal to or surpassing $50 billion annually. Between FY23 and FY24, Salesforce grew its revenues by 11.2 percent, reaching $34.9 billion. This momentum has been maintained, displaying an impressive 19.5 percent CAGR over the five years leading up to F 24. However, the YoY growth for FY24 is already below the mentioned five-year CAGR, and the latest Full Year FY25 guidance indicates an expected growth rate of 8 to 9 percent, suggesting a consistent deceleration in growth over the last 24 months. Looking specifically at results in the Americas region, particularly the U.S., the situation is slightly more adverse, with annual growth between FY23 and FY24 at 9.6 percent and a five-year CAGR of 17.9 percent.

In a mature market such as the U.S., where the adoption of CRM platforms is virtually at 100 percent of the addressable market, organic growth for Salesforce depends on several factors: the overall growth of the economy, the replacement of legacy CRM systems from other vendors, the introduction of new products that extend beyond traditional CRM functionality and changes in the business model that would allow for greater revenues from existing implementations. Salesforce addresses all four opportunities.

- To capture the small start-up companies that emerge each year due to economic growth, Salesforce offers the Starter Suite, accompanied by the Pro Suite, for startups that are beginning to scale. While these offerings were hardly mentioned by providers in previous years, the topic of Salesforce Essentials surfaced during conversations with several providers addressing the midmarket this year, suggesting increased attention to the lower end of the market.

Rapid development of GenAI use cases with an intense **focus on value realization** amid decelerating growth.

- For some time now, Salesforce's larger partners have been mapping accounts where customers still rely on CRM platforms such as Siebel or Chordiant, aiming to take targeted action toward migrating to Salesforce. With the maturation of Salesforce's Manufacturing Cloud, we are starting to hear about targeted activities focused on replacing SAP CRM. As a counterpoint, numerous providers have partnerships with both Salesforce and Microsoft, seeking to capitalize on flows between the two platforms —Salesforce to Microsoft Dynamics CRM and Microsoft Dynamics CRM to Salesforce. These providers advise customers based on platform best fit in relation to business requirements and enterprise landscape harmonization.
- Innovation is the hallmark of Salesforce. Each Dreamforce event features the launch of numerous new products aimed at keeping the platform current and opening new revenue streams for Salesforce and, indirectly, its partners. Industry Clouds were the highlight of Dreamforce 2022, while Data and AI featured prominently in Dreamforce 2023, and Agentforce and Revenue Lifecycle Management took center stage at Dreamforce 2024. Although Salesforce's financial reporting does not disclose segmented revenue at a level that allows for the observation of revenue performance from Industry Clouds or Einstein AI, a reported 28 percent increase in revenue for Data between FY22 and FY23 and a 20 percent increase in revenue for Integration and Analytics — which includes Mulesoft and Tableau — between FY23 and FY24 indicate positive trends. However, it is worth noting that, according to Q3 FY25 reporting, this area is also showing signs of deceleration in growth.
- Salesforce also seeks to extract more value from existing implementations. In addition to creating new value through innovation, as illustrated in the previous paragraph, Salesforce has adjusted its incentives for Account Executives to focus more on aspects of platform adoption. They work with providers to ensure that new seats sold are effectively utilized; it becomes clear that the greater the utilization of the platform, the stronger the customer stickiness with Salesforce and the increased future demand for new features and additional seats. At the same time, Salesforce is experimenting with a change in its commercial model by adopting usage-based pricing for Data Cloud and Agentforce. With this new pricing model, Salesforce aims to shift the conversation from TCO, where companies focus solely on lowering costs, to ROI, where companies seek to maximize benefits, even if that means incurring slightly higher costs.

The deceleration of growth has a direct impact on providers. Considering a group of providers identified as Leaders for which we had access to detailed global revenue with Salesforce, which in aggregate totals over $2.5 billion, the average 12-month revenue growth reported was 10.3 percent, with revenue growth figures for individual providers ranging from 0 percent to 32.1 percent. A similar calculation was performed with the reported number of full-time equivalent talent working with Salesforce, showing an average growth of 9.4 percent, with variation from 10 percent decrease to 36.2 percent increase.

Except for strategic investments, such as EQT's investment in Perficient, Blackstone's investment in Groupe Sii, EPAM's acquisition of NEORIS and Accenture's acquisitions of Mindcurv and Navisite, there have not been major consolidation deals for midsize to large Salesforce providers with presence in the U.S. during 2024. This contrasts with 2022 and 2023, when major deals occurred, including Mphasis' acquisition of Silverline CRM and WPP's acquisition of Fenom Digital, both in 2023 and LTI merger with Mindtree, NTT DATA's acquisition of Apisero, Deloitte's acquisition of Nubik, Interpublic Group's acquisition of RafterOne, Mastek's acquisition of MST Solutions. If the trend of deceleration in organic growth continues, we might witness more consolidation-related M&A deals involving midsize and large Salesforce providers in 2025 and beyond.

Data and AI start to affect customer structure

In a developed market like the U.S., data and AI are becoming key differentiators in customer structure. Similar to previous technological waves, we are starting to see a dichotomy between companies that fully embrace the combined power of data and AI and those that are still warming up to these new technologies.

- Large enterprises with an AI-first mindset have already implemented data lakes, embarked on programs to improve data quality and data governance and, in many cases, have already adopted one or a few major LLMs, training these models with their own proprietary data. When these companies look into modernizing their Salesforce implementation, they are particularly interested in aspects such as zero data replication and bring-your-own-model approaches. Salesforce consulting needs to be more strategic, as other platforms used by the customer will also already be AI-enabled. AI models and autonomous agents must be considered key players when reimagining business processes. As processes are re-engineered to include digital workers, human workers need to be prepared, and governance needs to be adapted, thus placing higher demand on change management.

- Midsize companies that seek higher competitiveness through technology may not have as complex legacy IT, data and AI landscapes as larger enterprises, but they are willing to consider investments that offer a clear ROI. These companies seek partners able to offer a library of use case-specific AI-based solutions, as well as the necessary consulting services to assist with data strategy and integration. The ability to demonstrate a solution's ROI and the skills required for a speedy implementation are critical for these companies.

- Forward-thinking startups and small companies looking to adopt a customer engagement solution to support their core sales, service, marketing and commerce needs may opt to go AI-native, leveraging an autonomous agent workforce to compensate for their limited scale. These companies seek a partner that can offer starter packages that align with their business needs and accelerators that facilitate migrating data from spreadsheets and other simple data sources into the platform.

Changes in provider structures and technologies

The acceleration of technological change, spearheaded by the introduction of GenAI, forces Salesforce providers to redefine their vision and realign their product development, talent-building and go-to-market (GTM) strategies. Providers that appear as Leaders in our quadrants have all followed a similar path. They have established internal CoEs for data and AI, established vertical-specific CoEs to develop AI-enabled solutions targeting common use cases within their respective industries, significantly invested in training and certifying their talent pool in AI, data and analytics, and, last but not least, hired GTM leads to communicate their reshaped vision, capabilities, offerings, partnerships and success stories to key customers and a broader audience, including industry analysts, in an accessible and relatable way.

Rapid innovation also calls for a safe environment for experimenting with new features and creating prototypes and PoCs. Providers have responded with innovation labs for co-creation. While these labs offer customers a safe sandbox environment to test new ideas, they also help providers to gain insights into use cases that matter to customers. Leading providers take this opportunity to learn and industrialize use case-specific solutions, which are then added to their libraries of vertical-specific solutions and ready to be used with other customers.

While cocreation and colearning are valuable, learning by doing is even better. The leading providers do not just advise customers on adopting AI; they have adopted AI themselves and transformed their operating models accordingly, allowing them to draw on their own experiences when advising clients. Numerous Salesforce practices have developed internal GenAI solutions that serve as the *operating system* for all their activities, from supporting solution design and driving workflows for delivery to assisting with code reviews and resolving lower-level incidents as part of support.

MuleSoft remains one of the preferred integration platforms for landscapes of enterprise platforms, including Salesforce. However, this space is now also occupied by Data Cloud. The ability to tap directly into data reservoirs using a data activation tool without creating additional copies presents a compelling alternative to traditional integration methods that rely on APIs. As the Zero Copy Partner Network expands to include offerings such as IBM's DB2 connectors for direct access to mainframe data, Data Cloud has become a central element of any integration architecture alongside MuleSoft. In response, several leading providers have rushed to become Salesforce-accredited Data Cloud experts.

Finally, two business model trends that we started to observe a couple of years ago are becoming increasingly popular among leading providers. The Outsourced Service Provider model allows partners to use Salesforce to build, deploy and manage business processes or operational capabilities as a service for their clients while retaining the licenses and delivering only the service. A similar model, business process-as-a-service BPaaS, exists where the provider takes over the operation of a business process, but the license may be retained by the customer.

Salesforce verticalization strategy gaining momentum

Although new strategies, such as data, AI and Agentforce, take center stage at events, Salesforce ensures that they all link back to its verticalization strategy. While Einstein AI was launched as a generic capability, in September 2024, Salesforce also introduced Industries AI with over 100 out-of-the-box AI capabilities to address industry-specific pain points across 15 sectors. The same applies to Agentforce; although it was launched during Dreamforce 2024 as a generic capability, it has already been indicated that agents tailored to specific industries, such as banking, healthcare and finance, will be introduced at a later date.

Perhaps more telling is the change in posture from some providers. Until last year, we observed a few large providers remained unconvinced about the value of industry clouds and continued to advocate for multicloud implementations with their proprietary layers of features for targeted industry use cases. This year, however, all providers aligned behind industry clouds and expressed satisfaction with Salesforce's approach to incentivizing providers to contribute their proprietary industry-specific assets, which will be integrated into the main Industry Cloud solution, benefiting the entire ecosystem.

The higher cost of Industry Clouds, which was previously seen as a barrier to adoption, is now justified by providers through the lens of long-term benefits. The common understanding is that by adopting industry clouds, technical debt should be reduced over time, while industry-specific features enable a faster realization of business benefits.

Partnerships — as important as ever

Partnering with ISVs remains critical for providing more complete solutions to customers and, in some cases, serves as a business development strategy as ISVs often bring project opportunities for their implementation partners.

Partnerships with Salesforce, however, are among the highest priorities of Leaders in this study. Recognition of Salesforce's industry expertise serves as a signpost for customers short-listing partners to participate in RFPs. The AppExchange is the first point of contact for customers and their advisors, and the Navigator distinction scheme is an excellent way to assess how providers are investing in their capabilities, as the distinction needs to be re-earned periodically.

In addition to certification, being invited by Salesforce to participate in partner advisory boards gives providers an opportunity to influence product roadmaps while gaining early visibility into future features. Becoming a launch and development partner for a new product is another significant distinction, as it opens the scope for providers to contribute their innovations to products while also granting access to Salesforce resources and funds related to new product introductions.

The continued effect of AI and the new impact of Agentforce

When Einstein GPT was introduced less than 24 months ago, OpenAI's ChatGPT was one of the few realistic options for LLMs. Although providers already had data scientists, the number of individuals with genuine knowledge about these models was extremely limited. Now, the situation has changed dramatically. The largest system integrators (SIs) have invested billions of dollars in training and certification. There are several options for LLMs to choose from, and the terminology has become commonplace. In various conversations with providers, terms such as vector database, embeddings, tokens and retrieval-augmented generation were used as trivial concepts.

As a result, some leading providers are now much less interested in discussing the basics of the technology and are focused on optimizing outcomes and exploring edge cases where predictability and compliance — especially in regulated industries — are essential requirements.

Agentforce, on the other hand, is brand new and is one of Salesforce's biggest bets; much of its hope to revive growth is pinned on the success of Agentforce as a new product category. Therefore, Salesforce has been careful to learn from previous launches' shortcomings and to ensure that the introduction of Agentforce is as smooth as possible to facilitate rapid adoption.

During Dreamforce 2024 and the subsequent world tours, customers had the opportunity to build their own agents and experience first-hand the capabilities of the product. The subsequent new product introduction program, which enables launch partners to develop PoCs at a very low cost for their customers, also contributes to the success of this launch.

The capability introduced by Agentforce is quite impressive. It effectively introduces a viable digital workforce; it is not merely about prompting a chatbot (essentially a co-pilot) but about engaging naturally with an agent that follows a workflow and adheres to prescribed guardrails. This agent can make decisions and take action. The future launch of Agentforce Voice will further integrate this type of digital workforce within the customers' organizations.

At this stage, several questions remain unanswered and leading providers are already focusing on developing the right capabilities to address them. These open questions include identifying realistic ROI given the new usage model introduced, determining how target operating models and supporting business processes need to be adjusted to accommodate the new digital workforce, managing the organizational changes resulting from a new operating model and upskilling the human workforce to perform higher value-added activities.

Closing Remarks on Leading Service Providers

- Leading providers keep abreast of technological changes, upskilling their resources to tackle both technology and business-related aspects. They do not just push new technology to customers; they also adopt it to gain a better understanding of pain points and opportunities.
- Leading providers maintain partnerships with a broad selection of ISVs and seize every opportunity to strengthen their relationship with Salesforce. They do this by investing in certifications and gaining expertise recognition, participating in Partner Advisory Boards, and becoming launch and development partners for new products.

Additionally, leading providers explore new business models with customers, such as

Outsourcing Service Provision (OSP) and BPaaS. They focus on outcomes and value creation, supporting customers throughout the entire solution lifecycle — consulting, implementation, delivery, operation, support and modernization.

DISCLAIMER: All observations in this report related to the provider's Navigator badges and expertise recognition at AppExchange are as per data available until the end of 2024. Navigator badges expire, and providers are invited to supply evidence to re-earn Salesforce recognition, resulting in periodic changes in the data displayed at AppExchange.

Despite a second year of growth deceleration, Salesforce's strategy to focus on verticals, enhance productivity with data, AI and Agentforce, and shift to an ROI-driven commercial model will eventually drive market expansion. Providers must partner closely with Salesforce and the broader ISV ecosystem while swiftly adapting their strategies, capabilities, and offerings to capture additional growth.

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
360 Degree Cloud	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
A5	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Accenture	Leader	Not In	Leader	Leader	Not In	Leader
Ad Victoriam Solutions	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
AllCloud	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Apps Associates	Not In	Contender	Not In	Not In	Contender	Not In
Birlasoft	Contender	Not In	Not In	Contender	Not In	Contender
Brillio	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Capgemini	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Product Challenger

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
Coastal	Not In	Leader	Leader	Not In	Not In	Leader
Coforge	Not In	Leader	Not In	Not In	Leader	Product Challenger
Cognizant	Leader	Not In	Leader	Leader	Not In	Leader
Credera	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Customertimes	Product Challenger	Not In	Not In	Leader	Not In	Product Challenger
Deloitte	Leader	Not In	Leader	Leader	Not In	Leader
DemandBlue	Not In	Leader	Product Challenger	Not In	Leader	Not In
Diabsolut	Not In	Contender	Not In	Not In	Contender	Not In
DXC Technology	Contender	Not In	Not In	Contender	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
EPAM Systems	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Not In
Eviden (Atos Group)	Product Challenger	Not In	Not In	Product Challenger	Not In	Product Challenger
Fast Slow Motion	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Globant	Contender	Not In	Contender	Contender	Not In	Not In
Grazitti Interactive	Not In	Leader	Not In	Not In	Leader	Not In
HCLTech	Leader	Not In	Product Challenger	Leader	Not In	Product Challenger
Hexaware	Not In	Leader	Not In	Not In	Leader	Product Challenger
Huron	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
IBM	Leader	Not In	Leader	Leader	Not In	Leader

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
Infosys	Leader	Not In	Leader	Leader	Not In	Leader
Jade Global	Not In	Leader	Not In	Not In	Leader	Product Challenger
LTIMindtree	Leader	Not In	Market Challenger	Market Challenger	Not In	Leader
Mastek	Not In	Product Challenger	Not In	Not In	Product Challenger	Product Challenger
Merkle	Not In	Not In	Market Challenger	Not In	Not In	Not In
Mphasis Silverline	Not In	Leader	Product Challenger	Not In	Leader	Product Challenger
Myridius	Not In	Rising Star ★	Not In	Not In	Market Challenger	Not In
NeuraFlash	Not In	Leader	Not In	Not In	Leader	Not In
NTT DATA	Market Challenger	Not In	Not In	Rising Star ★	Not In	Rising Star ★

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
OSF Digital	Market Challenger	Not In	Leader	Market Challenger	Not In	Not In
Perficient	Not In	Leader	Product Challenger	Not In	Leader	Product Challenger
Persistent Systems	Rising Star ★	Not In	Market Challenger	Market Challenger	Not In	Market Challenger
Publicis Sapient	Rising Star ★	Not In	Rising Star ★	Product Challenger	Not In	Not In
PwC	Leader	Not In	Rising Star ★	Product Challenger	Not In	Leader
RafterOne	Not In	Leader	Product Challenger	Not In	Rising Star ★	Not In
Reply	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Sercante	Not In	Product Challenger	Not In	Not In	Contender	Not In
Slalom	Product Challenger	Not In	Product Challenger	Product Challenger	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
TCS	Leader	Not In	Leader	Leader	Not In	Leader
Tech Mahindra	Leader	Not In	Leader	Leader	Not In	Rising Star ★
UST	Contender	Not In	Not In	Contender	Not In	Not In
VML	Not In	Not In	Contender	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Leader	Not In	Leader
Zennify	Not In	Contender	Not In	Not In	Product Challenger	Contender
Zensar Technologies	Not In	Contender	Not In	Not In	Contender	Not In

Sales strategy focus for **Salesforce Ecosystem Partners** in Implementation (modification) and Managed Applications (execution).

- **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**

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 categorization is particularly significant due to the substantial demand for Salesforce integration into the complex application landscape of large enterprises. Furthermore, large enterprises primarily have globally operating businesses that require corresponding delivery capabilities from service providers.

Expanding on the segmentation outlined above, the study will also include quadrants examining focused offerings, which are the sweet spot for a large pool of participants within the ecosystems and are sought after by clients. As a yearly investigation, running for the seventh consecutive year, this annual study is constantly updated to reflect Salesforce's year-over-year innovations, leading to occasional adjustments in the existing quadrants. For example, the Marketing Automation quadrant was adjusted last year to cover services beyond midmarket. The study's updates also allow us to adapt our examination of existing quadrants, incorporating the innovation that Salesforce introduces to improve its cloud offerings. This year, Salesforce's consolidated product strategy for Data Cloud, Einstein, Einstein GenAI and Agentforce products across its portfolio has been considered in our analysis.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following six quadrants for services/solutions: 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.

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 (quadrants)
- Focus on the regional market

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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

Provider Classifications: Quadrant Key

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

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.

Managed Application Services – Midmarket

This report is valuable for service providers offering managed application services in the U.S. 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, and examines how each addresses key regional challenges.

Marketing and sales leaders

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

Field service managers

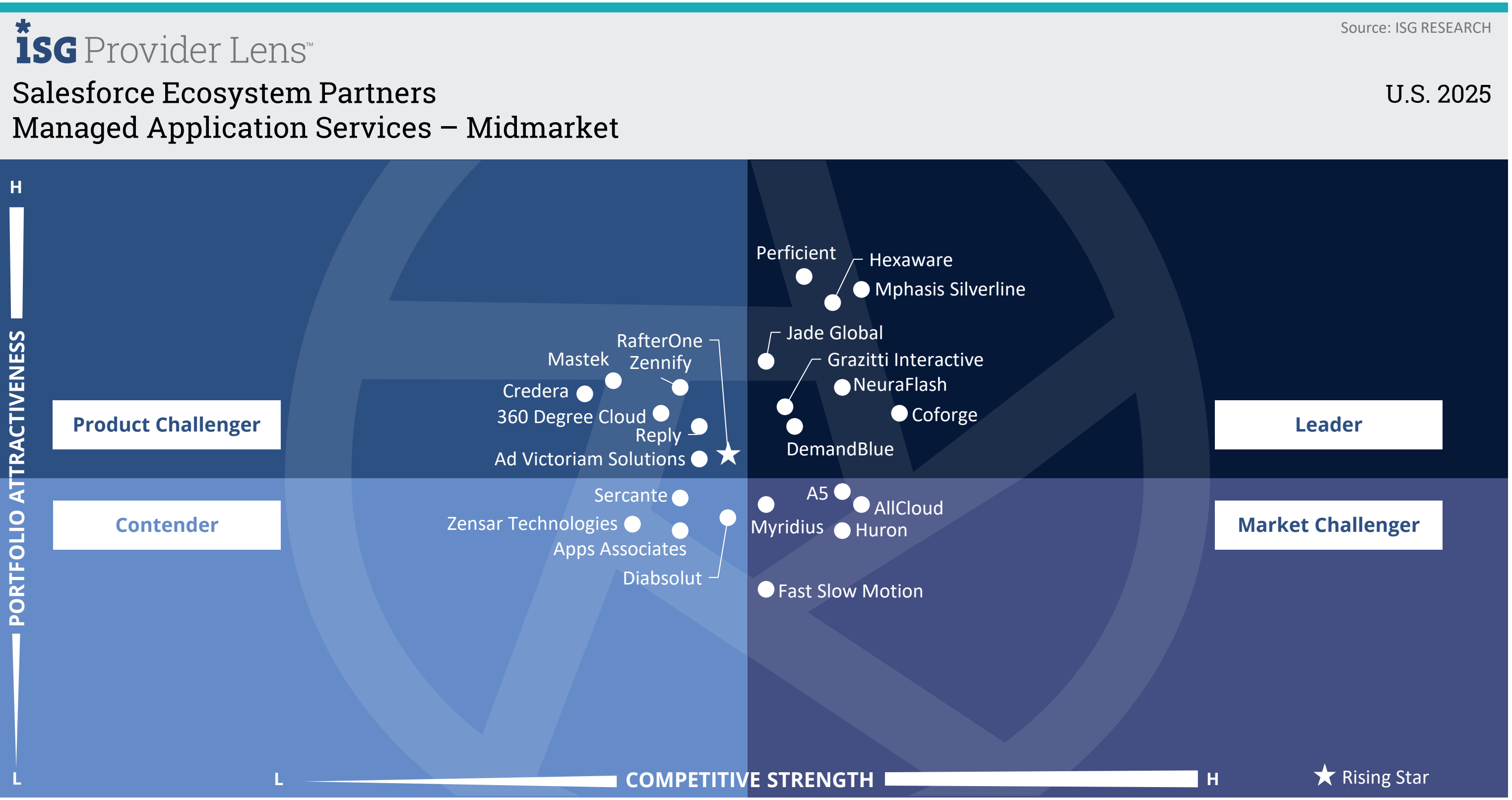
Should read this report to understand how service providers implement and expand the Salesforce Service Cloud use to better manage field service operations.

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 U.S. security laws for Salesforce integration and compare practices for an improved understanding.



This quadrant assesses the capabilities of providers to offer **managed services for Salesforce applications, mainly for midmarket clients**, which in many cases have a regional focus rather than a global one.

Rodrigo Barreto

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**

Observations

Historically, managed application services for the midmarket have focused on a limited range of offerings, with differentiation based on predefined services and various engagement models. However, this year, we observe the addition of new dimensions, such as CoEs support and a broader adoption of DevOps methodologies, alongside continuous innovation and delivery (CI/CD) practices.

In terms of movements within this market quadrant compared to last year, the initial observation is that Persistent Systems and Birlasoft have been excluded from consideration this year, as they have been identified as primarily serving the large enterprise segment.

Mphasis Silverline, Hexaware and Perficient continue to lead, showcasing the highest capabilities and the most differentiated managed application service offerings. Coforge has maintained its portfolio attractiveness, and its competitive strength has been adjusted to reflect a range of application services work performed in several areas, along with multiyear support contracts with key customers.

Both Grazitti Interactive and Jade Global have seen improvements in their competitive strengths, with Grazitti Interactive remaining a Leader while Jade Global has been promoted from Rising Star to Leader status. DemandBlue has also shown significant improvement in competitive strength and is now recognized as a Leader.

New to our evaluation this year, Neuraflash debuts as a Leader, while RafterOne enters as a Rising Star.

In summary, this year's landscape of managed application services in the midmarket demonstrates a shift toward more comprehensive offerings and capabilities.

From the 66 companies assessed for this study, 24 qualified for this quadrant, with 8 being Leaders and 1 Rising Star.

Coforge

Coforge offers comprehensive support for Salesforce, focusing on cost-effective, high-quality service. Its architecture-as-a-service optimizes Salesforce implementations for better decision-making and efficiency, while MuleSoft services automate migration processes.

DemandBlue

DemandBlue, a certified Salesforce Managed Services Provider, offers comprehensive Salesforce Administration to optimize investments. Their CPQ Health Check provides actionable insights for revenue maximization.

Grazitti Interactive

Grazitti Interactive specializes in managed services for Salesforce, delivering customized maintenance solutions. Their optimization approach leads to tailored workflows and continuous improvement, alongside extensive QA testing for reliable and efficient platforms.

HEXAWARE

Hexaware offers services, including BPaaS and catalog-based services for tiered support options. The company excels in data management, ensuring quality through standardization and enrichment, which enables a comprehensive customer 360-degree view.

Jade Global

Jade Global is recognized by Salesforce as an expert in Managed Services across six specializations, including Administration and Integration. Their maintenance model employs a value realization framework, facilitating gradual operational transformation while reducing total costs.

Mphasis Silverline

Mphasis Silverline is recognized by Salesforce as an expert in Managed Services. Their flexible and consultative approach prioritizes business value, offering services in architecture, project management and UX design.

NeuraFlash

NeuraFlash offers technology services for Salesforce, AWS and MuleSoft implementations. Their Onward Managed Services offer round-the-clock support for continuous maintenance and upgrades, acting as a single point of contact for clients.

Perficient

Perficient addresses Salesforce implementation challenges with 24/7 managed services, skilled resources and scalable solutions to enhance ROI. Their data management services ensure accurate data collection, cleansing and reporting to maximize value from Salesforce.

RafterOne

RafterOne is a Level 2 Salesforce Managed Services specialist, offering tailored strategies for Salesforce Administration, Process Automation, User Adoption, Data Management and Performance Optimization, all focused on enhancing efficiency and operational performance.

Leader

"Grazitti Interactive is a leader focused on the value of managed application services for Salesforce. This focus manifests in its offerings related to Optimization and Quality Assurance."

Rodrigo Barreto

Grazitti Interactive

Overview

Grazitti Interactive is headquartered in Panchkula, Haryana, India and has more than 1,200 technology experts. It is a technology consulting firm that designs and implements cloud-based solutions using Salesforce products. The company was founded in 2008 and has offices in the U.S., India, Australia, Canada and Singapore. Its customer base includes Fortune 100 companies, nonprofit organizations, government agencies and small to midsize enterprises. In the U.S., Grazitti Interactive has over 20 Salesforce-certified experts out of more than 250 globally.

Strengths

Quality Assurance: Grazitti Interactive offers comprehensive testing solutions, including functional, integration, regression and performance testing, to ensure optimized, error-free platforms. The process starts with an audit to identify issues and align testing strategies with business goals. Skilled QA professionals develop detailed test cases using both manual and automated techniques. Defects are systematically documented with reports outlining issues and solutions, and continuous support is provided through automated test execution in the CI/CD pipeline.

Focus on value: Grazitti Interactive offers managed services for Salesforce platforms, ensuring seamless operations and optimal value through tailored maintenance and support for midmarket and large enterprises. The company emphasizes proactive measures, including rigorous predeployment testing, to minimize disruptions and enhance performance, customization, regular system health checks and user training support.

Optimization services: Grazitti Interactive's structured approach begins with a discovery phase to identify pain points, followed by customized configurations, workflows and automation tailored to client needs. An iterative methodology allows continuous monitoring and refinement based on performance metrics, ensuring sustained value. Ongoing support and training are also offered.

Caution

Grazitti Interactive's managed services for Salesforce are a key component of its value proposition to customers, providing the company with the opportunity to scale operations by engaging more U.S.-based experts and to enhance recognition for its Managed Services, with a focus on achieving Level II specialist recognition.

Appendix

The ISG Provider Lens 2025 – 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.

Study Sponsor:
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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

Lead Author

Rodrigo Barreto
Lead Analyst

Rodrigo specializes in management consulting and enterprise architecture that he uses to drive insights into the business and technical capabilities of IT companies delivering enterprise solutions.

Based in the U.K., Rodrigo joined the ISG Provider Lens™ in 2022 as an independent consultant. He holds a Master's degree in Business Administration and an undergraduate degree in Electrical Engineering. His expertise in designing complex solutions and advising on the full lifecycle of large IT implementations is leveraged to assess and report on providers and software vendors.

Rodrigo's experience spans more than three decades in the information and communications technology sector in a variety of senior architecture and consulting roles. He advises investors, providers, industry bodies and consultancies. Rodrigo has worked with customers in the Americas, Europe, the Middle East and Asia.

Enterprise Context and Global Overview Analyst

Ayushi Gupta
Senior Research Analyst

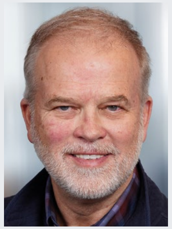
Ayushi is a Senior Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Salesforce Ecosystem and the Future of Work. She supports the lead analysts in the research process and authors the Enterprise Context, the Global Summary report, focal points and 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

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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.

ISG Provider Lens™

APRIL, 2025

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