ISG Provider Lens™

Salesforce Ecosystem Partners

Multicloud Implementation and Integration Services for Large Enterprises

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

Customized report courtesy of: pwc

QUADRANT REPORT | MARCH 2023 | GERMANY

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Strong growth in demand for Salesforce services increases associated challenges for providers

Salesforce was founded in 1999 and is headquartered in San Francisco, California. The company is known for its easy-to-use user interface and comprehensive feature set that enables its customers to efficiently collect, analyze and deploy data.

Salesforce enjoys a strong presence in the global market and is the most widely used CRM system in the world. It is also one of the leading providers of cloud-based application systems as software as a service (SaaS).

Salesforce helps companies of all industries and sizes manage and improve their customer relationships. With its cloud-based approach, Salesforce can be used from anywhere, making it easier for ist customers to manage their customer data and activities. The comprehensive feature set across sales, service and marketing makes Salesforce a preferred choice for companies looking to take their customer relationships to the next level.

Salesforce's iterative approach to its Agile software development enables regular software updates to deliver new features and enhancements to customers. These updates are part of Salesforce's continuous innovation process and help ensure that CRM software stays current and meets the needs of businesses.

In 2022, sales growth continued as in previous years. In some industries, the progressive transfer of business processes, or at least parts of them, to the Internet has increased the demand for IT solutions. As Salesforce primarily focuses on customer processes, the COVID-19 pandemic has opened additional growth opportunities for the company in these areas.

The rapid growth has also added to the demand for implementation services. Meanwhile, the availability of qualified personnel with Salesforce expertise has been a bottleneck in carrying out implementations. This has triggered a significant consolidation trend in the market for corresponding services, with the major system

There is a **strategic shift** to Salesforce's **industry-specific products** integrators, in particular, looking to expand their capacities by acquiring other providers.

Although the macro developments described above were also observed in Germany last year, they were still much less pronounced than in the U.S. In addition to takeover activities, which do not create additional capacity in the market, many providers are now focusing on strengthening their recruitment measures. Enterprises are hiring and training young experts as Salesforce consultants, while some are retraining experienced consultants from other areas to make them Salesforce experts.

The acquisitions of Cloud Consulting Group by Mindcurv and of Comselect by Assist Digital represented important developments in the German Salesforce market. They were made with the aim of expanding Mindcurv's and Assist Digital's capacities in the area of Salesforce consulting and implementation, respectively.

These acquisitions reflect a prevalent market trend as companies seek to expand their cloud solutions and services capabilities to meet the growing demand for cloud-based solutions. In both cases, the companies combined their strengths and competencies to offer a broader and deeper range of cloud solutions and services.

A significant trend at Salesforce is the focus on different industries. Initially, industry-specific products such as Financial Services Cloud and Health Cloud were introduced. In 2020, this focus was further strengthened by the acquisition of Vlocity, an independent software provider that has developed industry-specific products based on Salesforce. This appears to be an enduring trend, which is why Salesforce's offering is continually evolving toward industry focus. However, it remains to be seen whether this will have an impact on the functionality of classic products such as Sales Cloud and Service Cloud.

Since the publication of the last ISG Provider Lens™ (IPL) study on Salesforce a year ago, the German market for Salesforce implementation services has not changed significantly outside the general trends mentioned above. In contrast to the market condition in the U.S., the trend toward consolidation, primarily through acquisitions of midsize providers by global system integrators, has not yet been as pronounced in Germany. Individual acquisitions continued to take place, but not as many as in the U.S. However, the pace of consolidation has increased in Germany as well. The abovementioned takeovers of Cloud Consulting Group by Mindcurv and Comselect by Assist Digital are examples of major acquisitions. Factory42, the largest owner-managed Salesforce consulting company in Germany, is also attracting increasing interest from various corporate groups.

The hybrid Agile approach is still the most widely used method for global customers that need to integrate Salesforce into their complex systems. It combines Agile methods for the implementation phase with phase-oriented approaches for strategy, design and rollout and is now offered by many service providers. However, the pure Agile method is still suitable for a single Salesforce implementation; it is mainly used for midsize customers without global rollout requirements.

The MuleSoft platform remains the leading tool for integrating Salesforce with other applications. Therefore, a deep understanding of this platform is now an essential requirement to be successful in the Salesforce integration solutions market. Large system integrators usually employ a dedicated area or department for corresponding competencies for this platform.

Partnerships with ISVs within the Salesforce ecosystem are important for all providers, whether they are systems integrators or boutique companies. The need for advanced functionality beyond Salesforce's standardized feature set remains high. They can be obtained through the Salesforce-operated AppExchange Store-Portal and are offered with separate licensing. Salesforce guarantees that each app meets software quality requirements such as troubleshooting, maintenance or compatibility with Salesforce products.

This year's study includes the Multicloud Implementation and Integration Services for Large Enterprises quadrant. Supporting global rollouts and covering the often-complex integration requirements are key success factors for providers in this quadrant. This year, Accenture, adesso, Capgemini, Cognizant, Deloitte Digital, HCLTech, IBM, Infosys, PwC, Reply and Wipro established themselves as Leaders and Factory42 qualified as a Rising Star in this quadrant.

In the Implementation Services for Core Clouds Midmarket quadrant, adesso, Cloud Consulting Group, Deutsche Telekom, DIGITALL, Factory42, Persistent Systems, Reply and Salesfive qualified as Leaders this year. The current Rising Stars, Cloud Monsters and Assist Digital, have the prospect of becoming Leaders in the future if they continue to develop positively.

The Implementation Services for Marketing Cloud Midmarket quadrant has been renamed Implementation Services for Marketing Automation Midmarket this year. The following providers qualified as Leaders in this quadrant this year: adesso, Deutsche Telekom, DIGITALL, Factory42, Persistent Systems, Reply and Salesfive.

The Managed Application Services for Large Enterprises quadrant, like the corresponding quadrant for implementations, is largely dominated by large and internationally operating systems integrators. Other players occupy significant sub-segments but fall a little short of the Leader position. Accenture, Capgemini, Cognizant, HCLTech, IBM, Infosys, TCS and Wipro qualified as Leaders in this quadrant this year.

Although large systems integrators have favorable cost structures due to their global delivery models, they do not play a significant role in the Managed Application Services for Midmarket quadrant. On the one hand, this is due to the rather less complex requirements in this quadrant, and on the other hand, the large systems integrators do not appear to have a high priority in this quadrant. Accordingly, the following companies qualified as Leaders: adesso, Deutsche Telekom, DIGITALL, Factory42, Persistent Systems, Reply and Salesfive. Cloud Consulting Group and Cloud Monsters qualified as Rising Stars in this quadrant.

Compared to last year, the scope of this year's study has been expanded to include the Implementation Services for Industry Clouds quadrant; the Implementation Services for Analytics Solutions quadrant has been removed. The following companies qualified as Leaders in Industry Cloud implementation: Accenture, Capgemini, Cognizant, Deloitte Digital, Deutsche Telekom, IBM and Infosys.

> The continuous growth of Salesforce clients constantly drives up the demand for additional implementation capacity.

Provider Positioning

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	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Accenture	Leader	Not In	Not In	Leader	Not In	Leader
adesso SE	Leader	Leader	Leader	Not In	Leader	Product Challenger
aquilliance	Not In	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Assist Digital	Not In	Rising Star ★	Product Challenger	Not In	Not In	Product Challenger
Atos	Product Challenger	Not In	Not In	Product Challenger	Not In	Product Challenger
BearingPoint	Not In	Market Challenger	Product Challenger	Not In	Product Challenger	Not In
Brighter Cloud	Not In	Contender	Not In	Not In	Not In	Not In
BYNG4 Consulting	Contender	Contender	Not In	Not In	Not In	Not In
Capgemini	Leader	Not In	Not In	Leader	Not In	Leader

Provider Positioning

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	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
CGI	Contender	Not In	Not In	Contender	Not In	Not In
Cloud Consulting Group	Not In	Leader	Product Challenger	Product Challenger	Rising Star ★	Contender
Cloud Monsters	Not In	Rising Star ★	Not In	Contender	Rising Star ★	Not In
Cloudity	Not In	Product Challenger	Contender	Not In	Contender	Not In
Cognizant	Leader	Not In	Not In	Leader	Not In	Leader
Customertimes	Product Challenger	Not In	Not In	Contender	Not In	Not In
Deloitte Digital	Leader	Not In	Not In	Not In	Not In	Leader
Deutsche Telekom	Not In	Leader	Leader	Not In	Leader	Leader
DIA	Not In	Product Challenger	Product Challenger	Not In	Product Challenger	Contender

Provider Positioning

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	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
DIGITALL	Not In	Leader	Leader	Not In	Leader	Market Challenger
dotsource	Not In	Contender	Not In	Not In	Not In	Not In
Eigenherd	Not In	Contender	Contender	Not In	Not In	Not In
Empaua	Not In	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Entero	Contender	Not In	Not In	Not In	Not In	Not In
EPAM	Contender	Not In	Not In	Not In	Not In	Not In
Factory42	Rising Star ★	Leader	Leader	Product Challenger	Leader	Product Challenger
Fujitsu	Contender	Not In	Not In	Contender	Not In	Not In
HCLTech	Leader	Not In	Not In	Leader	Not In	Not In

Provider Positioning

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
IBM	Leader	Not In	Not In	Leader	Not In	Leader
ilum:e Informatik	Not In	Contender	Not In	Not In	Contender	Not In
Infosys	Leader	Not In	Not In	Leader	Not In	Leader
LTIMindtree	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
mindsquare	Not In	Contender	Not In	Not In	Not In	Not In
Nagarro	Not In	Market Challenger	Market Challenger	Not In	Market Challenger	Not In
NTT DATA	Product Challenger	Not In	Not In	Product Challenger	Not In	Market Challenger
Persistent Systems	Not In	Leader	Leader	Not In	Leader	Not In
PwC	Leader	Not In	Not In	Not In	Not In	Not In

Provider Positioning

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	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Reply	Leader	Leader	Leader	Product Challenger	Leader	Product Challenger
Salesfive	Not In	Leader	Leader	Not In	Leader	Product Challenger
Sopra Steria	Contender	Not In	Not In	Not In	Not In	Not In
TCS	Product Challenger	Not In	Not In	Leader	Not In	Not In
Tech Mahindra	Product Challenger	Not In	Not In	Market Challenger	Not In	Not In
Wipro	Leader	Not In	Not In	Leader	Not In	Not In

Key focus areas for **Salesforce Ecosystem Partners in 2023**.

Simplified Illustration Source: ISG 2023

- **Multicloud Implementation and Integration Services for Large Enterprises**
- **Implementation Services for Core Clouds Midmarket**
- **Implementation Services for Marketing Automation Midmarket**
- **Managed Application Services for Large Enterprises**
- **Managed Application Services for Midmarket**
- **Implementation Services for Industry Clouds**

Definition

The Salesforce Ecosystem study examines various offerings of the Salesforce platform, which has been categorized into implementation services (the Change business) and managed application services focusing on operational support for productive applications (the Run business). These segments have been further categorized based on the clients they serve into large enterprise clients and the midmarket due to the significant need for Salesforce integration into the complex application landscape for large enterprise clients. Furthermore, these clients primarily have globally operating businesses that require corresponding delivery capabilities from 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 (quadrants)
- A perspective on different markets, especially the U.S., Germany, U.K., France, 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

This ISG Provider Lens™ quadrant study was divided into the following six segments of the Salesforce ecosystem:

- Multicloud Implementation and Integration Services for Large Enterprises
- Implementation Services for Core Clouds Midmarket
- Implementation Services for Marketing Automation Midmarket
- Managed Application Services for Large Enterprises
- Managed Application Services for Midmarket
- Implementation Services for Industry Clouds

Provider Classifications

The provider positioning reflects the suitability of the respective IT provider for a defined market segment (quadrant). Unless otherwise stated, the positioning applies to all company size classes and industries. If the IT service requirements of large enterprises and SMEs differ and the range of IT providers operating in the local market is sufficiently large, IT providers are further differentiated by service according to the target group for products and services. Either industry requirements or the number of employees and the corporate structures of the customers are taken into account, and the IT providers are positioned according to their focus. As a result, a distinction is made between two customer groups, if necessary, which are defined as follows:

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

The ISG Provider Lens™ quadrants are created based on an evaluation matrix and contain four fields into which providers are classified: Leader, Product & Market Challenger and Contender. Each quadrant of an ISG Provider Lens™ study may also include a provider that ISG believes has great potential to achieve a Leader position. Such providers may be classified as Rising Stars.

Number of providers per quadrant: ISG evaluates and positions the most important providers according to the scope of consideration of the respective study; the number of providers positioned per quadrant is limited 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.

Multicloud Implementation and Integration Services for Large Enterprises

Who Should Read This Section

This report is relevant to large enterprises across industries in Germany for evaluating Salesforce multicloud implementation and integration service providers.

In this quadrant, ISG defines the current market positioning of these service providers and how they address critical challenges faced by large enterprises that have already adopted various cloud products from the Salesforce portfolio. Over the years, Salesforce has expanded its product strategy beyond CRM and ensured its presence in related applications, development, integration and reporting. ISG observes a rise in demand for Salesforce implementation and integration services among enterprises. Such services can enable the adoption and use of Salesforce cloud solutions and their peripheral tools.

In Germany, large enterprises with a global presence often prefer vendors that have demonstrated robust integration capabilities and can operate independently on a global scale without relying on partners. Language proficiency has been a major concern for German customers, wherein service providers offer Salesforce services in German and English for effective communication and reachability.

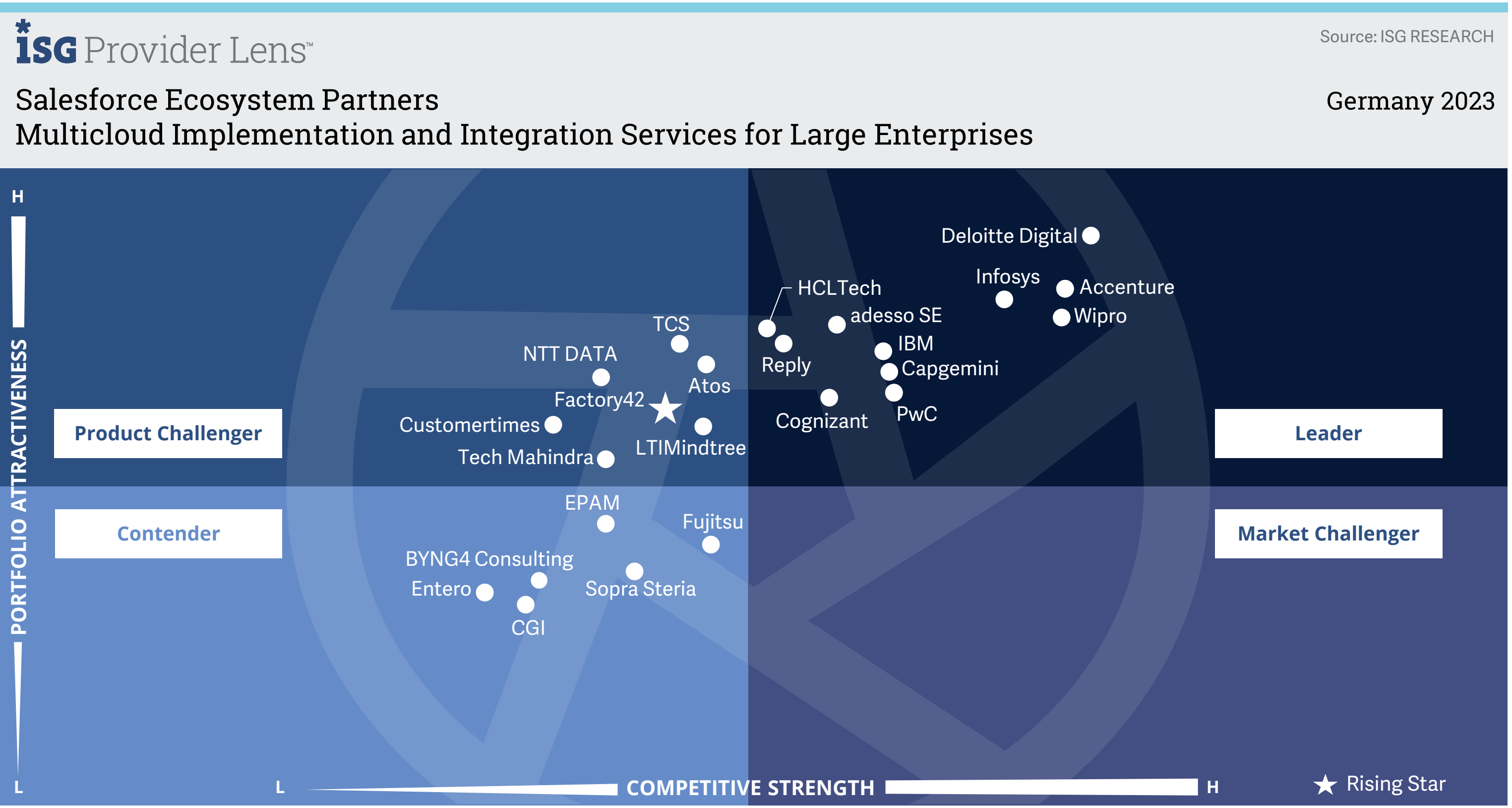
German enterprise clients are seeking flexible resource locations (onshore, nearshore and hybrid) and dedicated teams based on their specific requirements, with service providers expanding their onshore presence through acquisitions, establishing new offices, and other investments.

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service providers that can help them effectively implement Salesforce Marketing Cloud, Salesforce Sales Cloud, Heroku and other offerings, with the necessary integration into related systems and analysis solutions.

IT and technology leaders should read this report to understand providers' relative positioning and capabilities and how they can help effective adoption of services from Salesforce clouds, along with integration and analytics solutions. The report also explains how the technical capabilities of service providers are compared in the market.

Security and data professionals should read this report to understand how providers comply with the security and data protection laws in the U.K. for their Salesforce implementation and integration practices and how they can be compared with one another.

Field service managers should read this report to understand how service providers can help implement and expand the use of Salesforce Service Cloud to manage field service operations better.



This quadrant assesses companies that support organizations in creating **scalable IT infrastructures**. By using different **cloud platforms**, highly **complex IT infrastructures** can be built.

Reza Sarwari

Definition

This quadrant includes providers of implementation services for Salesforce applications and their integration with other major standard software solutions. These solutions are usually part of the complex system landscape of large and globally operating enterprise clients. The scope of this study takes into consideration that these clients, in most cases, use various cloud products of the Salesforce portfolio. In many cases, the implementation is conducted as a part of a long-term program, with multiple rollouts in various divisions of the client organization and regions. From a functional perspective, implementation services include process consulting, design, configuration, data cleansing, migration and finally, go-live support.

Eligibility Criteria

1. Strong implementation capabilities **(consulting, configuration, data migration and go live)** across all Salesforce products
2. **Deep knowledge** of the major standard software packages other than Salesforce, in addition to the ability to **implement end-to-end processes**
3. Broad **competencies in architecture** and realization of complex application landscapes
4. Availability of **predefined solutions** and accelerators, preferably both functionally oriented and industry specific
5. Delivery **capabilities at scale** to serve large enterprise clients

Observations

In recent years, there has been steady growth in the market for Salesforce implementation and integration services. At the same time, the availability of qualified resources with Salesforce expertise remains a limiting factor for the number of implementations. This has led to significant consolidation pressure in the market for related services, with the major systems integrators seeking to expand their resource base by acquiring other providers, mainly midsize providers with strong portfolios and significant resource bases. Even if this does not generate additional capacity as such, this process is likely to continue. In addition, the focus in many cases is now on multicloud implementations in conjunction with the use of Salesforce as an enterprise platform for innovation.

From the more than 90 companies assessed for this study, 24 have qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture offers a wide range of powerful predefined solutions to many industries, which can help increase productivity in project execution. The company also has a high level of integration expertise.

adesso

adesso has a powerful, versatile delivery model, significant industry knowledge and extensive experience and references in multicloud implementations.

Capgemini

Capgemini has significantly expanded the number of consultants with Salesforce experience in recent years and has extensive expertise in a number of industries.

cognizant

In addition to a compelling Salesforce-specific methodology and powerful industry solutions, **Cognizant** stands out for its recent remarkable growth in the Salesforce market.

Deloitte Digital

Deloitte Digital places a significant focus on business process design and has numerous preconfigured solutions, making it a leading provider of associated business strategy and technology.

HCLTech

HCLTech has many years of extensive Salesforce implementation experience and recently invested significantly in building Salesforce-skilled resources and related certifications. As a result, HCLTech has advanced from Rising Star to Leader.

IBM

With its global network; onshore, nearshore and offshore capacities; and industry and specialist expertise, **IBM** has been able to win many customers in recent years.

Infosys

In addition to a powerful delivery model and extensive industry expertise, **Infosys** offers a comprehensive library of predefined solutions for implementation and integration, lifecycle management and training.

pwc

As a leading professional services firm in Germany, **PwC** can demonstrate a high level of industry expertise and customer loyalty and has a clear focus on Salesforce implementations.

REPLY

Reply has shown impressive growth in the Salesforce implementation market in recent years. The company has a strong focus on implementation using Agile methods and has extensive experience with multicloud projects.

wipro

Wipro combines extensive functional knowledge with industry expertise and a global delivery model. In addition, the provider has a strategic consulting division that supports customers during their transformation process.

The following provider was able to achieve the Rising Star status and, thus, has the potential to become a Leader in this quadrant in the future:

Factory42

Factory42 has many years of extensive Salesforce implementation experience, has recently invested significantly in building Salesforce-skilled resources, and benefits from a strong partner network.

Leader

"PwC is a highly competent Salesforce implementation partner with compelling development tools."

Reza Sarwari

PwC

Overview

PwC, headquartered in Frankfurt am Main, is one of the leading auditing and professional services firms in Germany. The company employs more than 13,000 experts at 21 locations in Germany. As a Salesforce Global Strategic Partner, PwC has a high level of subject matter expertise and offers a wide range of Salesforce services, including Salesforce application development, data integration, migration and training. The company also offers tailored consulting services to ensure that Salesforce solutions are aligned with each client's specific business needs.

Strengths

High level of industry expertise: PwC has a broad range of experience and knowledge in various industries and can use this knowledge to develop client-focused solutions tailored to the specific requirements and needs of each client.

Global presence: As a leading global consulting firm with 680 offices worldwide, PwC has a strong presence in the German market and, as a Global Strategic Partner of Salesforce, also meets the technical requirements for a multicloud implementation.

Regional presence: With 21 offices and more than 13,000 experts in Germany, PwC ensures proximity to clients. It also has significant industry experience.

Broad Salesforce portfolio: PwC has a broad portfolio of Salesforce solutions. In addition to the standard packages, it can draw on internally developed platforms that have been customized for specific industries.

Up-to-date market knowledge: Through its own studies, PwC has access to a lot of data and information on the current market situation and can adapt well to conditions and make better forecasts.

Nearshore capacities: Through its global network, PwC can draw on nearshore capacities.

Caution

PwC should continue to focus on Salesforce and seek more certifications.

PwC focuses more on implementing Salesforce solutions and less on developing its own Salesforce products and apps compared to various other Salesforce partners.

Appendix

The ISG Provider Lens™ 2023 - Study Salesforce Ecosystem Partners report analyzes the relevant software vendors/service providers in the German 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 2023, 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

Lead Author

Reza Sarwari
Senior Consultant

Reza Sarwari is a Lead Analyst with 13 years of professional experience in Salesforce consulting in the DACH market.

In 2009 he started his career as a Salesforce developer; at that time, he already had six years of experience in designing and developing online applications. After several projects as a Salesforce consultant, he founded his own Salesforce agency called Cloudideas GmbH in 2012.

Reza Sarwari led Cloudideas as CEO until 2022 and had approximately 25 Salesforce experts in his company at peak times. In 2022, Cloudideas was acquired by Real Consulting SA from Athens.

Research Analyst

Puranjeet Kumar
Senior Research Analyst

Puranjeet Kumar is a Senior Research Analyst at ISG and is responsible for supporting and contributing to Provider Lens™ studies on Next-Gen ADM Solutions & Services and Salesforce Ecosystem. He supports senior analysts in the research process and writes the Global Summary Report. Puranjeet also develops content from an enterprise perspective and collaborates with consultants and enterprise clients on ad hoc research assignments. He previously worked for several market research firms and has more than eight years of experience in market research and consulting, with a focus on collecting, analyzing and preparing quantitative and qualitative data. His expertise covers diverse technologies such as application development, analytics and Salesforce.

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

For more information, visit isg-one.com.

MARCH, 2023

REPORT: SALESFORCE ECOSYSTEM PARTNERS