



HFS Top 10 Salesforce Services 2020

Excerpt for Appirio

HFS Research authors:

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TOP 10
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April 2020

“Enterprises should consider CRM transformation engagements rather than Salesforce module deployment projects. Only then will they maximize the value of Salesforce.”

—*Khalda De Souza, Research Director*

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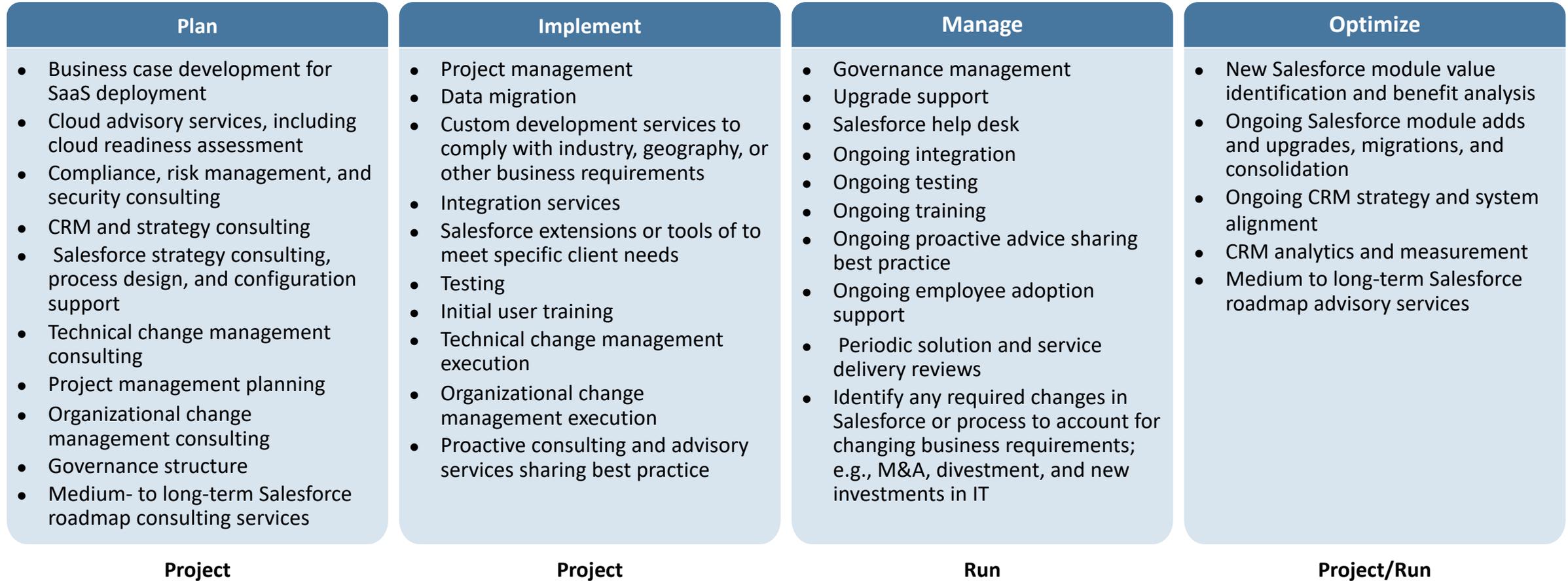
Introduction, definitions, and research methodology

Introduction and definitions

- The HFS Top 10 Salesforce Services 2020 report continues our theme of looking at the services sets for the planning, implementation, and management of leading software-as-a-service platforms.
- The HFS Top 10 Salesforce Services 2020 report is an update of the HFS Salesforce Services Blueprint report of 2017.
- We included 11 service providers in this research. We selected a 10 global service providers and one smaller specialist partner.
- We spoke with 16 client references provided by the participating service providers. This was augmented with reference calls, surveys and reviews from an approximately 30 additional references.

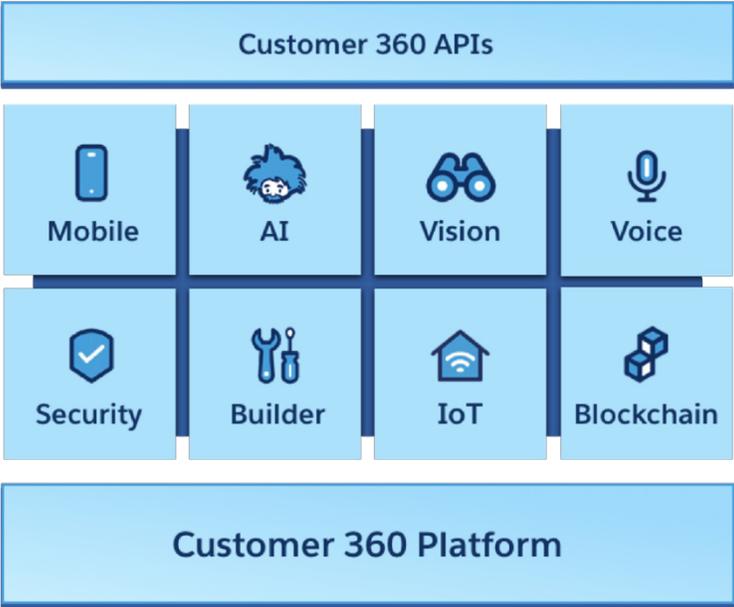
HFS Salesforce Services value chain

The HFS Top 10 Salesforce Services 2020 report assessed 11 service providers' ability to deliver Salesforce services as mapped to the HFS Salesforce Services value chain.



Salesforce Solutions: Salesforce Customer 360

We assessed services provided to deploy and support all Salesforce solutions, as described by Salesforce in its Customer 360 market



Source: Salesforce 2020

Research methodology

The HFS Top 10 Salesforce Services 2020 report assessed and scored service provider participants across execution, innovation, and voice of the customer criteria. The inputs to this process included a detailed RFI process conducted with 11 service providers, briefings with leaders of the Salesforce services practice within service providers, as well as reference calls and surveys of reference clients.



33.3%

Ability to execute

- **Breadth of services and delivery capability:** Value chain coverage, service capabilities, and geographic coverage.
- **Depth of services:** Differentiating services and solutions, including proprietary tools and templates.
- **Market and team experience:** Size and experience of Salesforce services practice.



33.3%

Innovation capability

- **Vision for the development of Salesforce services:** Investment plans to enhance service offerings and assets.
- **Positioning of the service provider in this market:** Thought leadership and credibility in CRM, including client feedback on this.
- **Ability to drive long-term business value:** Sharing innovation with clients to achieve long-term business value.



33.3%

Voice of the customer

- **Direct feedback from service provider clients:** From reference checks, surveys, and case studies critiquing provider performance and capabilities.

Salesforce services providers assessed in this report

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accenture

APPIRIO
A WIPRO COMPANY

bluewolf
an IBM Company

Capgemini

Cognizant

Deloitte.

Infosys

NTT DATA

pwc

TATA
CONSULTANCY
SERVICES

virtusa

Executive summary

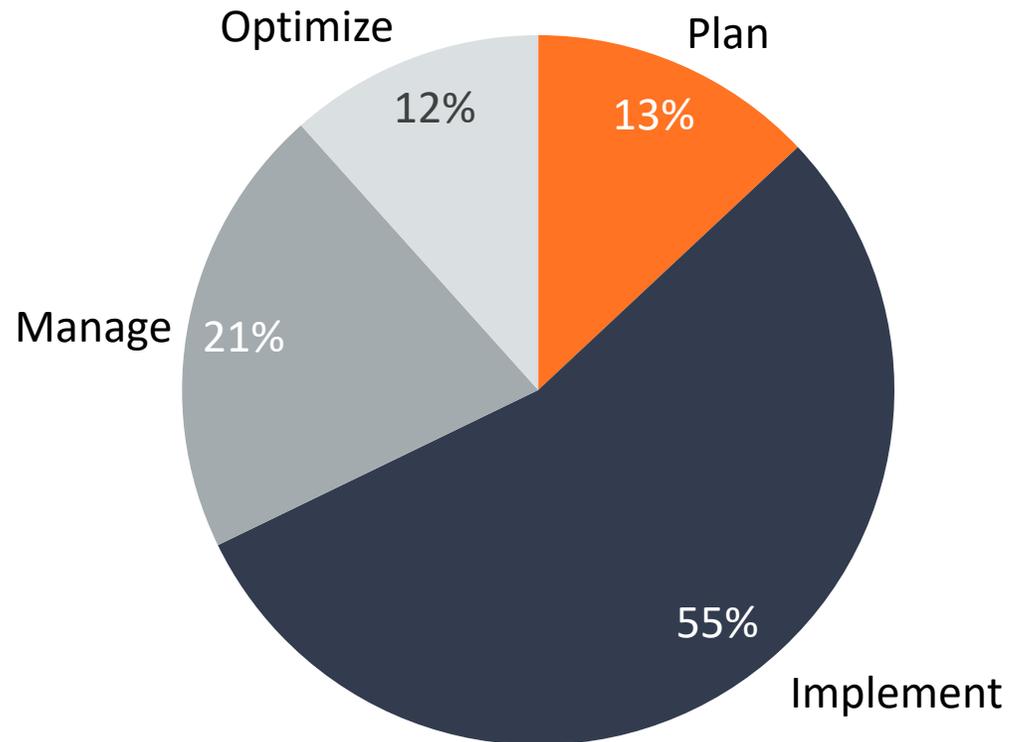
Salesforce services provider investments

We identified the following typical investment areas for the service providers analyzed in this report:

- **Design thinking:** Service providers have invested in design thinking services in the past few years, either organically or through acquisitions. Some have created specific digital services divisions such as Accenture Interactive, Deloitte Digital, IBM iX, and PwC Digital Services. Most, such as Cognizant and Infosys, have acquired digital agencies or agency talent, which strengthens both consulting capabilities and onshore presence and delivery capability.
- **Industry solutions:** Most Salesforce services providers are developing industry sector solutions. These range from accelerators to business templates that demonstrate industry sector business understanding. To stand out some service providers have selected a few industries to create differentiation, such as Virtusa Corp.
- **Business and transformation focus:** Salesforce services providers are positioning as process transformation partners that focus on the user adoption and help customers understand the long-term implications of an implementation post go-live. Differentiation lies in experience and credibility to take on complex projects.
- **Global expansion:** For most Salesforce services providers, this really just means growing business outside of North America. Capgemini and NTT DATA are good examples of service providers that are equally strong in Europe and North America. Acquisitions of digital agencies and other Salesforce partners are also bringing some of this geographical expansion. Clients require a blended offshore, nearshore, onshore, and onsite delivery capabilities.
- **Certifications:** All services providers continue to invest in Salesforce certifications to keep abreast of client demand.

Clients: Most Salesforce services providers are doing at least one of the above. Check experience, talk to reference clients, and ensure that you will have the resources available where you need them to identify your best-fit partner.

Approximate split of Salesforce services business by value chain services



- Implement remains the biggest piece of the pie today, and service providers expect most growth to still come from implementation services projects in the next 12 to 18 months.
- Opportunities continue in Plan, Manage, and Optimize services.

* Aggregate responses of service providers in this Top 10
Source: HFS Research, March 2020

- **Help clients to maximize investments:** There are continued opportunities to help clients to maximize their existing investments in Salesforce. Issues include clients not using or not even knowing everything they have bought. Many large enterprises have several Salesforce instances, often because an individual business unit has independently invested in Salesforce. Service providers can position as a strategic advisor and offer ROI and governance assistance.
- **Position Salesforce in the client's CRM strategy:** Salesforce is positioning all solutions as belonging to a platform, rather than individual Salesforce cloud modules. Service providers have opportunities to take this one step further and position client initiatives in their overall CRM strategy. This elevates a technical engagement to a business solution.
- **Prioritize change management:** Organizational change management is an important consulting and implementation service. Clients should not underestimate the importance of user adoption during Salesforce deployments to ensure success.
- **Present all differentiating assets to clients:** The Salesforce services market is a crowded competitive landscape with most partners investing in all the same areas. To differentiate, clearly market your key asset investments that will facilitate deployments and present business context for clients.
- **Market, market, market:** Most enterprises we have spoken with are unsure about the ongoing investments and full capabilities of Salesforce services providers. This includes asset developments, but also acquisitions, re-organizations to focus on digital services, geographical expansion, and ramping up of senior-level Salesforce consultants. Enterprises often overlook a service provider based on an outdated perception of their capabilities and positioning. Service providers are missing many opportunities by failing to effectively communicate their up-to-date capabilities and vision to prospective clients and to Salesforce, which often recommends partners to clients.

Salesforce services market snapshot

This table reflects the data collected and estimates for the 11 service providers included in this report.

Combined Salesforce services practice headcount	~50,000
Combined Salesforce certified consultant headcount	~30,000
Top three Salesforce services certifications currently held	<ol style="list-style-type: none"> 1. Salesforce Certified Sales Cloud Consultant 2. Salesforce Certified Service Cloud Consultant 3. Salesforce Platform App Builder
Top three Salesforce services certifications planned in the next 12 months	<ol style="list-style-type: none"> 1. Marketing Cloud 2. Commerce Cloud 3. Field Service Lightning
Top three Salesforce solutions deployed in the past two years	<ol style="list-style-type: none"> 1. Sales Cloud 2. Service Cloud 3. Community Cloud
Top three Salesforce solutions currently deploying	<ol style="list-style-type: none"> 1. Service Cloud 2. Sales Cloud 3. Marketing and Commerce Cloud

* Aggregate responses of service providers in this Top 10
Source: HFS Research, January 2020

Salesforce services market snapshot (continued)

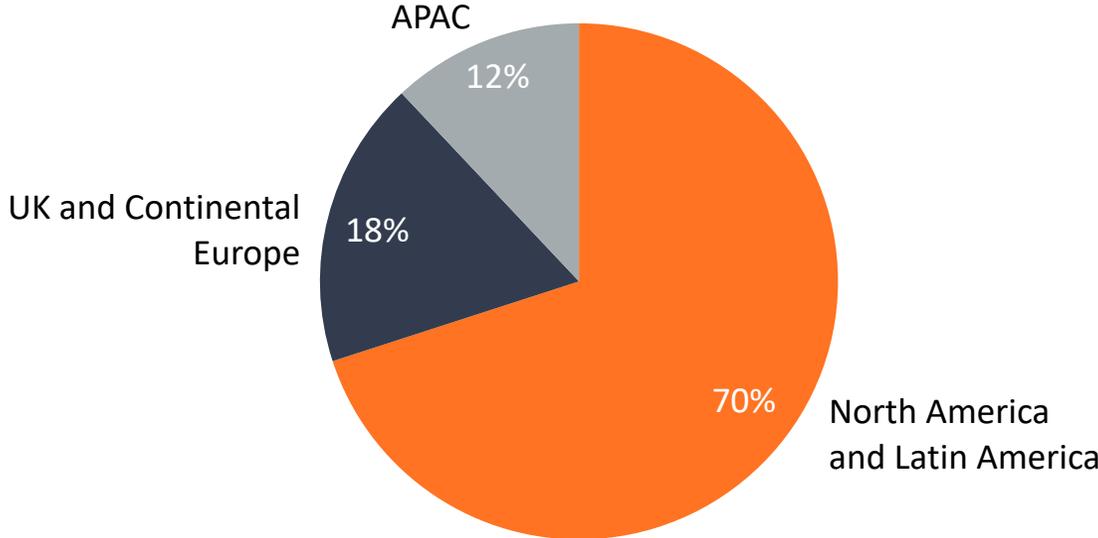
This table reflects the data collected and estimates for the 11 service providers included in this report.

Top three fastest growing Salesforce solutions	<ol style="list-style-type: none">1. Financial Services Cloud2. Marketing and Commerce Cloud3. CPQ Cloud
Other certifications or solutions mentioned	<ol style="list-style-type: none">1. Platform Developer2. Einstein Analytics3. Financial Services Cloud4. Integration Cloud and Mulesoft

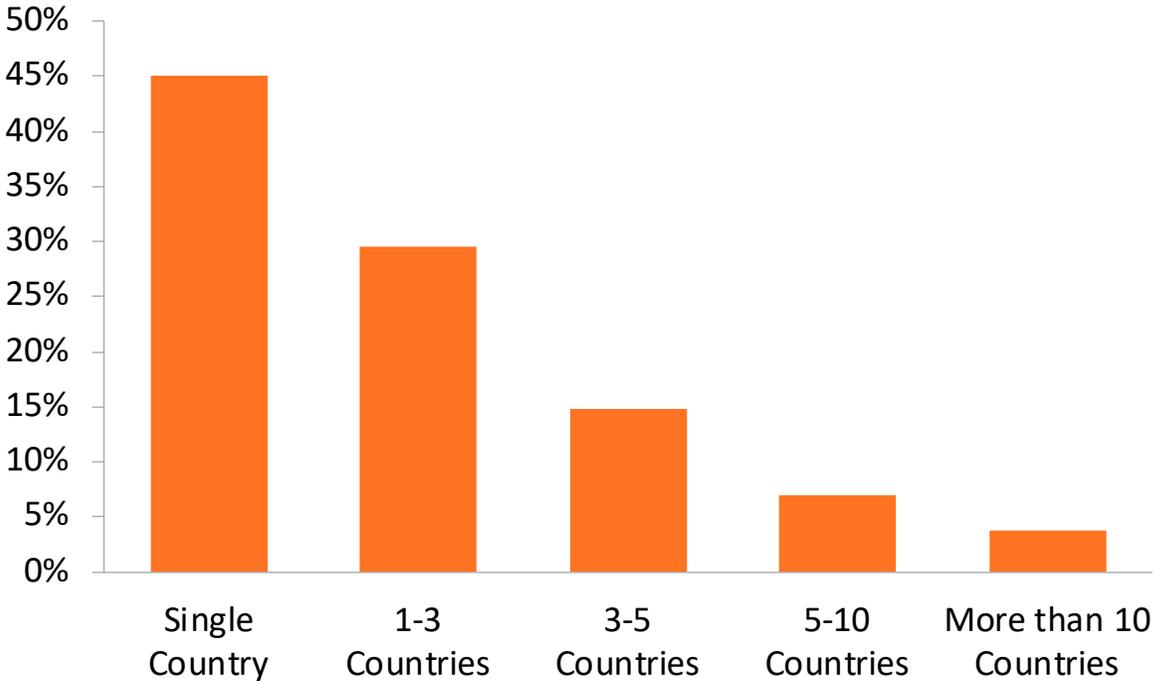
- Continued opportunities across Salesforce solutions
- Phase 2 deployments that are more strategic in nature are more common
- Salesforce Industry Clouds gaining traction

Salesforce services business by geography

Split of Salesforce services business by geography



What percentage of your Salesforce services engagements are in the following geographical categories:



Aggregate responses of service providers in this Top 10
Source: HFS Research, February 2020

Salesforce Services: Voice of the Customer

Why Salesforce?

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It is the best solution to meet our business needs

It is a SaaS solution or fast go-to-market

It is scalable and will grow with our organization

It is the industry leader

Our peers, partners, or suppliers are using it

We were already using it in one department and liked it

The seamless integration between clouds

Which other solution(s) did you consider?

- Oracle
- SAP
- Microsoft Dynamics
- Cloudfuse
- Apptus

Aggregate responses of client references in this Top 10
Source: HFS Research, February 2020

Why this service provider?

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1

References

2

Technical
expertise

3

Catered to
specific
business needs

4

Existing
positive
experience

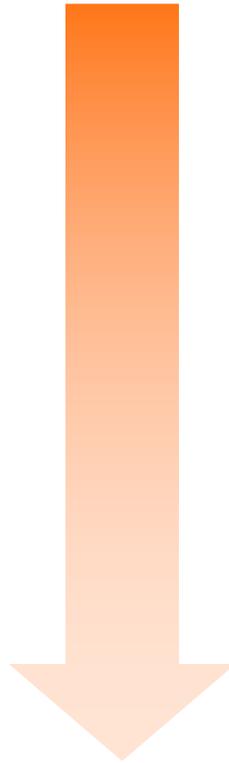
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Flexibility

Aggregate responses of client references in this Blueprint
Source: HFS Research, February 2020

Client satisfaction with Salesforce services

Client reference enterprises were asked to rate their service provider out of 10 along 9 different criteria. This slide shows the average scores ranked in order from the highest scores to the lowest scores



1. Quality of account management team
2. Flexibility and incorporating client feedback
3. CRM process understanding
4. Industry and business understanding
5. Overall success of project
6. Strength of resources
7. Geographic footprint and scale
8. Availability of resources
9. Ability to drive long-term business value

* Aggregate responses of client references in this Top 10
Source: HFS Research, February 2020

Salesforce Services Partners

Salesforce services partner categorization

Salesforce categorizes partners according to their Trailblazer score (which used to be called the Partner Value Score or PVS). The Trailblazer score measures a partner's contribution against Salesforce-set targets across three main categories:

- Customer Success, which includes:
 - A Navigator score, which is determined by a service partner's product and industry experience, backed by proven customer success stories
 - The number of solutions, including bolt-ons and components the partner has available on the AppExchange platform
 - Customer satisfaction score, based on a Salesforce monitored survey
- Innovation, which includes points allocated according to the number of certifications a services partner holds. These are tiered according to experience and the ability to meet customer business requirements. Salesforce awards the most points for a Certified Technical Architect (CTA) which is the most senior level expert. This is also a rare certification. In this research, there are only 50 CTAs across the 11 participating service providers, and Accenture has 22.
- Engagement, which is an Annual Contract Value sales target which can be partner-led or joint with Salesforce

Partner level categorization is as follows:

- Global Strategic, which is the highest level of categorization. There are 7 Global Strategic partners in this research.
- Platinum; there are three Platinum partners in this research.
- Gold; there is one Gold partner in this research.
- Silver
- Registered

- **Salesforce AppExchange:** Clients can access the Salesforce AppExchange ecosystem to find applications to enhance the Salesforce platform, components to build applications, and consultants for assistance. This site provides information on Salesforce top-level profiles, statistics, and client reviews for consultant partners. Salesforce is making the AppExchange more tailored for customers so that they can find consultants that best meet their needs. The statistical information is not always up-to-date on the site, and not all partners are represented, but it still remains the key resource to find information on service partners. It is worth noting that for the number of Salesforce certified consultants, Salesforce only indicates those that have product certifications. Service providers, however, also have other relevant certifications, such as administrator certifications. We have therefore used the AppExchange and individual service provider input for the statistics in the profiles in this report.
- **Salesforce certifications:** Salesforce is retiring the term “FullForce” for its certifications. In the past, service providers could gain FullForce Master and FullForce Industry certifications to indicate general and industry sector expertise respectively. Newer certifications include Salesforce Lightning Bolt solutions which are industry solution templates. The profiles in this report contain a mix of the FullForce and newer terminology as this change takes place. In the next update of this report, we will not use the FullForce terminology.
- **Tight scoring:** It is worth noting that the Salesforce services market is a competitive landscape of different types and sizes of providers. This report highlights some of the most successful global providers and a fast-growing specialist partner. The scores for each of the criterion we selected were very close between each of the service providers we included. Readers should note that all 11 of the providers included in this report are strong Salesforce services providers with strong execution and innovation investments and credibility.

The HFS Salesforce services Top 10 results

Summary of Salesforce service providers assessed in the report

Service providers (alphabetical order)	HFS point of view
Accenture	Biggest pool of certified Salesforce consultants with a focus on continuous innovation
Appirio	Business context understanding and industry sector solution development focus
Bluewolf	Breadth of services and business focus in a globally expanding practice
Capgemini	Positioning as a transformation partner with industry sector strength
Cognizant	Good growth, with strong investments and business transformation mindset
Deloitte	Digital focus with industry sector strength, developing business-centric solutions
Infosys	Strengthening capabilities and local presence, with industry sector focus
NTT DATA	Acquisitive service provider with a solution focus, global coverage capability, and industry sector expertise
PwC	Continued growth, business focus, and expanding geographic presence
TCS	Growth business with strong focus on industry sectors and innovation
Virtusa	Target industry sector focus in a fast-growth practice

Notable performances in HFS Salesforce services Top 10

HFS Podium Winners								
Top services providers across execution, innovation, and voice of the customer criteria								
#1			#2			#3		
Execution powerhouses			Innovation champions			Outstanding voice of the customer		
Top 3 service providers on execution criteria			Top 3 service providers on innovation criteria			Top 3 service providers on voice of the customer criteria		
#1	#2	#3	#1	#2	#3	#1	#2	#3
Other notable performances								
<ul style="list-style-type: none"> • PwC ranked #4 for overall innovation and #7 for overall execution • Bluewolf ranked #4 for overall execution and overall innovation • TCS ranked just outside the top five at #6 for voice of the customer 								

HFS Top 10 Salesforce Services Rankings 2020

Rank	Overall HFS Top 10 position	Execution				Innovation				Voice of the customer
		Breadth of services and delivery capability	Depth of services	Market and team experience	Overall execution	Vision for the development of Salesforce services	Positioning of the service provider in this market	Ability to drive long-term business value	Overall innovation	
#1										
#2										
#3										
#4										
#5										
#6										
#7										
#8										
#9										
#10										

Salesforce Services Provider Profile

Business context understanding and industry sector solution development focus

Dimension	Rank	Strengths	Opportunities
HFS Top 10 position	#4	<ul style="list-style-type: none"> Strong industry sector tool investment: Appirio has a library of over 2,000 pre-built assets, including 11 Lightning Bolt solutions across multiple industry sectors. These include MarketPlace Onboarding for retail and Customer Onboarding for financial services. A new dedicated Product and Innovation (P&I) team develops new products, solutions, and accelerators to meet specific customer and industry needs. Its remit is two-fold. It develops products, such as its professional services product, Estimator, which are used by its implementation teams as well as sold as a subscription to clients. It will also continue to develop industry sector Lightning Bolt solutions. Appirio's new Close The Experience Gap Framework and its accompanying Enterprise Capability Management (ECM) Tool is helping industry specific customers along their Salesforce experience journey to gain value realization on the platform. Positioning Salesforce engagements in a business context: Appirio's Close the Experience Gap framework adopts a long-term business context view of a Salesforce deployment. It determines the user, operational and financial success of a deployment. One client said that Appirio has "a great understanding of the platform and its capabilities and how you can apply it to many facets of your business." Account management and flexibility: Clients commend Appirio on the quality of its account management and flexibility. One client said that Appirio is "collaborative, receptive to adjusting as need be, and responding to any concerns that have arisen." 	<ul style="list-style-type: none"> Confusion over future plans: Some clients may be confused about Appirio's future plans being part of Wipro, likely exacerbated by Wipro's decision to sell Appirio's Workday services practice to Alight Solutions in 2019. Clients should note that Salesforce services is a strong strategic play for Wipro. For example it has aligned its global salesforce with the Appirio solutions to help expand sales beyond Appirio's historical stronghold of North America. Clients looking for a global Salesforce services partner should consider Appirio.
Ability to execute	#5		
Breadth of services and delivery capability	#5		
Depth of services	#3		
Market and team experience	#7		
Relevant acquisitions and partnerships	Key clients	Operations*	Technology tools and platforms
Innovation capability #5 Vision for the development of offerings #4 Positioning of the service provider in this market #8 Ability to drive long-term business value #9	Acquisitions include: <ul style="list-style-type: none"> Appirio (acquired by Wipro, 2016) Cellent (2016) HealthPlan Services (2016) 4C (2020) Partnerships include: <ul style="list-style-type: none"> Salesforce, FinancialForce, Conga, Vlocity, Coveo, Xactly, nCino, Anaplan 	Appirio serves enterprises around the world, primarily focusing on Fortune 1000 enterprises. Most of its Salesforce services business is from the US, UK, ANZ, Japan with Continental Europe, LATAM and CANADA as emerging regions.	<ul style="list-style-type: none"> Close The Experience Gap Framework + Enterprise Capability Management (ECM) Tool Customer Onboarding: Financial services Nigel: Cross-industry application Marketplace Onboarding: Retail Higher Education Student Experience: Higher education (for profit or non-profit) Patient Care Management: Healthcare and life sciences Estimator: Professional services Appirio DX: Cross-industry application Franchise and Retail Communications: Retail Patient Onboarding: Healthcare and life sciences Higher Education Faculty Experience: Higher education (for profit or non-profit) Cloud Management Center (CMC): Professional services Connected Field Knowledge: Energy and utilities Employee Community: Cross industry Medicare Enrollment: Healthcare and life sciences
	Industry coverage: <ul style="list-style-type: none"> Manufacturing, technology, health and life sciences, banking and financial services, media and telecom, energy and utilities, retail and consumer goods, non-profit and education Publicly disclosed clients include: <ul style="list-style-type: none"> NYSE, BP, The First Tee, Yeti, Ashfield, Georgetown, OnePath, University of Melbourne, Ivy Tech, Stanford, BNSF, Sony Music, Amazon, Philips, McGraw-Hill Education, GE, Vantiv, Shell, NBN Co, HP, News UK, LLS, Facebook, Coca-Cola, Experian, Home Depot 	<ul style="list-style-type: none"> Partner level: Appirio, Global Strategic; Wipro, Platinum Salesforce Certified Consultants: 2,000 Average number of certifications per employee: 3 Certified technical architects: 1 Total number in practice: 2,200 Number of projects completed: 4,000 Key delivery locations for Salesforce practice: <ul style="list-style-type: none"> India (50%+): Bangalore, Pune, Delhi NCR, Hyderabad, Chennai, Jaipur North America: US, Canada LATAM: Mexico, Brazil, Chile EMEA: UK, NL, IRL, CH, DE, FR, PT APAC: Australia, Japan, Philippines 	
Voice of the customer	#3		

*Source: Salesforce AppExchange and service provider

About the author



Khalda De Souza

Research Director, SaaS Services and Cyber Security Services

Khalda De Souza is Research Director, SaaS services and Cyber Security services at HFS Research. She tracks how service providers are developing their SaaS services and Cyber Security services strategies as well as enterprise clients' requirements and needs in these markets.

Khalda joined HFS Research in October 2014. Prior to HFS, Khalda was a senior level IT services research analyst at Gartner for nearly 20 years. In that time, she managed the European research for several areas including network and IT security and business applications. Khalda has led key research deliverables such as Magic Quadrants for both Europe and global markets at Gartner.

Khalda has extensive experience in providing strategic advice to both IT services providers and customer organizations globally. For providers this includes, but is not limited to, channel strategies, product positioning, competitive intelligence, market trends and forecast analysis. For customers, Khalda has provided insightful guidance on sourcing and vendor selection strategies. ([View bio and contact details.](#))



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