

# Salesforce Ecosystem Partners

A research report comparing provider strengths,  
challenges and competitive differentiators

Customized report courtesy of:



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Report Author: Marcio Tabach

**The French Salesforce market is receiving heavy investments and has shown robust growth recently.**

Salesforce is among the world's fastest-growing platform vendors. It recorded double-digit growth for the last 10 years, reaching a global revenue of \$25 billion in 2022. The market in France is no exception. The market has seen increased acquisitions and the emergence of prominent companies. This report cites the acquisitions of 14 Salesforce partners in Europe in the last three years, which are either French companies or companies that operate in France. Salesforce also recognized a few providers with less than three years of operations that have experienced rapid growth. This demonstrates that the Salesforce market in France is growing rapidly. It is unlikely to reach an inflection point in the short term, despite the recent Salesforce layoffs and uncertain economic conditions in Europe.

Cloud services recorded a robust 30 percent growth in France from 2021 to 2022. Many providers interviewed for this study reported that France is a growing market for their operations. Some global IT companies also named France as a future anchor. Salesforce's announcement in 2018 that it would invest \$2.2 billion for the following five years has helped in this growth. Since then, Salesforce has developed two R&D centers in France, Paris and Grenoble. Salesforce has acquired local companies and invested in partners through its Salesforce Ventures SI Trailblazer Fund. Evidence shows that all these investments paid off. In 2022, Salesforce renewed its investment plan for the following five years, announcing an augmented sum of \$3.5 billion in France.

Salesforce partners in France can be divided into four categories: broad-range-service technology companies; Salesforce pure-play partners; digital marketing agencies and ISVs. This report does not assess ISVs. They are relevant to the extent that service providers can implement their solutions as part of their architectures. Most Salesforce solutions are available on the Salesforce

The large volume of M&A and new players' entry attest to the growth of the French market.



## Executive Summary

AppExchange marketplace, which offers more than 8,000 specialized solutions. Each of these provider categories brings different strengths and weaknesses to the market. For example, digital marketing agencies have more Salesforce Marketing automation cloud implementations as they offer marketing services.

On the other hand, companies with sizeable broad-range-service technologies usually have more verticalized offerings and a more significant number of Salesforce industry solution cases. Pure-play partners have Salesforce clouds at the core of their offerings and specialize in Salesforce. They can implement off-the-shelf Salesforce clouds faster.

During the COVID-19 pandemic, companies in all sectors were obliged to digitalize their sales and CRM, which fueled the demand for Salesforce solutions. This study shows that service providers that could preempt the market by either acquiring relevant Salesforce partners or mass recruiting Salesforce professionals achieved greater success in the French market. As demand grows, qualified

labor and delivery capacity become key differentiators and drive M&A. Qualification programs were also crucial for enhanced delivery capacity. Some leading companies in this study invest heavily in obtaining certifications and in recruiting and retaining their workforce. The search for certifications such as Top Employer is evidence of this trend. Some large companies pay their recruits during the period when they are in qualification and training programs.

Many providers use automation for cloud implementation, data integration and management services. Providers can implement clouds and integrate databases with automated functionalities. This approach eliminates the need for large teams, speeds up the implementations and reduces manual work errors. Managed services also benefit from automation. If one bug is identified and replicated across the whole architecture, automation helps resolve the issue throughout the system. Such benefits of automation have propelled the growth of AI use in Salesforce implementations and managed services. Many of these automated processes are embedded in

providers' tools and accelerators. A few of them address industry-specific issues or use cases.

AI is also used to personalize experiences through the Salesforce platform. Personalized CX is considered a key factor in increasing revenues and the ROI for Salesforce implementations. Therefore, providers are focusing on Einstein Analytics and Tableau implementations. They have partnered with companies to use data integration tools such as Talend or Informatica. Having an integrated customer data platform (CDP) where customer journeys can be tracked, clustered and predicted is at the core of digital customer relationships. It can significantly enhance revenues, margins and customer loyalty.

Providers in France must be able to implement multinational and multilingual Salesforce projects because customers also have e-commerce operations beyond France's borders. Even small and mid-sized companies operate in other European countries and need multilingual and multinational support. Large enterprises have large deployment needs in several countries simultaneously. Providers with

a wide European and overseas footprint could benefit from their reach.

Regarding managed services, providers offer low-cost, front and back-office support for clients' nearshore locations. French providers prefer outsourcing their application managed services (AMS) to former French territories, such as Morocco and Lebanon, where French-speaking professionals are readily accessible. Nevertheless, French companies must have a client face in France's continental territory, also known as the hexagon (l'Hexagone).

The last trend is the increasing concern about environmental, social and governance (ESG) initiatives. Salesforce has already taken the first step and developed the Net Zero Cloud. It believes that this concern will shape customers' behavior soon. Most global providers have presented internal initiatives to embrace ESG practices and may have some net-zero implementations. Although the number of Net Zero Cloud implementations is limited, companies will adopt measures to reduce their carbon emissions, and Net Zero will play a key role in this process.




## Executive Summary

Despite the adversities, the Salesforce market in France continues to grow. The recent cost concern should further boost the Salesforce platform's commercial and marketing automation projects. The large corporation provider segment expects to face intense competition due to the recent acquisitions and investments by significant global service providers. French companies still dominate the midsize and small segment, which has room to grow in the number of projects and technological sophistication. In this context, the French market can expect a continued high volume of M&A activity and the entry of new players. Current service providers should seek to specialize in specific industries and technologies as the market continues to grow and competition intensifies. Business expertise, especially in the French context, will be an important source of differentiation.

The large corporation provider segment will face intense competition due to the recent acquisitions and investments by significant global service providers. However, French companies dominate the segment of midsize and small companies and have room to grow regarding the number of projects and technological sophistication.




 Provider Positioning

Page 1 of 4

	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	Product Challenger	Not In	Not In	Product Challenger	Not In	Product Challenger
Atos	Leader	Not In	Not In	Leader	Not In	Leader
Capgemini	Leader	Not In	Leader	Leader	Not In	Leader
CGI	Leader	Not In	Product Challenger	Product Challenger	Not In	Leader
Cognizant	Leader	Not In	Leader	Leader	Not In	Leader
Comforth Easyfront	Leader	Leader	Leader	Market Challenger	Leader	Market Challenger
Customertimes	Product Challenger	Product Challenger	Not In	Not In	Product Challenger	Contender
Deloitte Digital	Leader	Not In	Product Challenger	Not In	Not In	Leader
Devoteam	Leader	Not In	Not In	Leader	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
GFT	Contender	Product Challenger	Not In	Not In	Not In	Not In
Hardis Group	Not In	Leader	Leader	Not In	Leader	Not In
HCLTech	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Inetum	Market Challenger	Contender	Contender	Contender	Not In	Market Challenger
Infosys	Rising Star ★	Not In	Not In	Leader	Not In	Not In
KPC	Not In	Contender	Not In	Not In	Contender	Not In
Levana	Not In	Not In	Rising Star ★	Not In	Not In	Not In
LTIMindtree	Product Challenger	Not In	Not In	Product Challenger	Not In	Product Challenger
Manao	Not In	Contender	Not In	Not In	Contender	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
Nagarro	Contender	Not In	Not In	Not In	Not In	Not In
Niji	Not In	Leader	Leader	Not In	Leader	Not In
OSF Digital	Product Challenger	Rising Star ★	Product Challenger	Contender	Rising Star ★	Contender
Persistent Systems	Not In	Leader	Product Challenger	Not In	Leader	Product Challenger
PwC	Product Challenger	Not In	Not In	Not In	Not In	Product Challenger
Reej Consulting	Not In	Product Challenger	Not In	Not In	Contender	Not In
Reply	Product Challenger	Product Challenger	Product Challenger	Contender	Product Challenger	Product Challenger
Sopra Steria	Market Challenger	Not In	Not In	Market Challenger	Not In	Market Challenger
SunTseu	Not In	Contender	Contender	Not In	Contender	Not In





 Provider Positioning

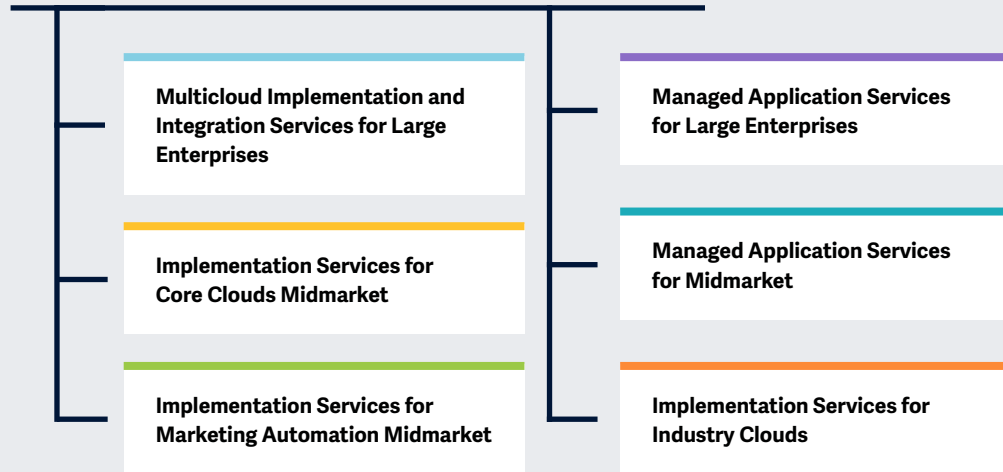
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	<b>Multicloud Implementation and Integration Services for Large Enterprises</b>	<b>Implementation Services for Core Clouds Midmarket</b>	<b>Implementation Services for Marketing Automation Midmarket</b>	<b>Managed Application Services for Large Enterprises</b>	<b>Managed Application Services for Midmarket</b>	<b>Implementation Services for Industry Clouds</b>
Tech Mahindra	Product Challenger	Product Challenger	Contender	Contender	Product Challenger	Product Challenger
Valtech	Not In	Not In	Product Challenger	Not In	Not In	Not In
Viseo	Leader	Leader	Product Challenger	Not In	Leader	Not In
VO2 Group	Not In	Leader	Not In	Not In	Market Challenger	Not In
Wipro	Product Challenger	Not In	Not In	Rising Star ★	Not In	Rising Star ★



This study focuses on the important aspects for the **Salesforce Ecosystem** in 2023.

Simplified Illustration Source: ISG 2023



### 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.



### Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following six quadrants for services/solutions: 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; and Implementation Services for Industry Clouds

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

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

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use

information from these reports to evaluate their existing provider relationships and potential engagements.

### Provider Classifications

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

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

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product and 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 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

## Multicloud Implementation and Integration Services for Large Enterprises

### Who Should Read This Section

This quadrant is relevant to large enterprises of all industries in France and evaluates Salesforce multicloud implementation and integration service providers.

In the report, ISG defines the current market positioning of these service providers and how they address the critical challenges faced by large enterprises in the country that have adopted various cloud products from the Salesforce portfolio.

Over the years, Salesforce has expanded its product portfolio beyond CRM applications and ensured its presence in related applications, development, integration and reporting. ISG sees increased demand for Salesforce implementation and integration services from enterprises. Such services will fuel the adoption and use of Salesforce cloud solutions and their peripheral tools.

Global service providers leading the multicloud implementation and integration market in France offer ready-to-use implementation and integration services to expedite digital transformation as enterprises seek ready-to-go products with limited customization.

Large enterprises that prioritize global Salesforce service providers with solid implementation and integration capabilities consider France a growing market.



**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.



**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.

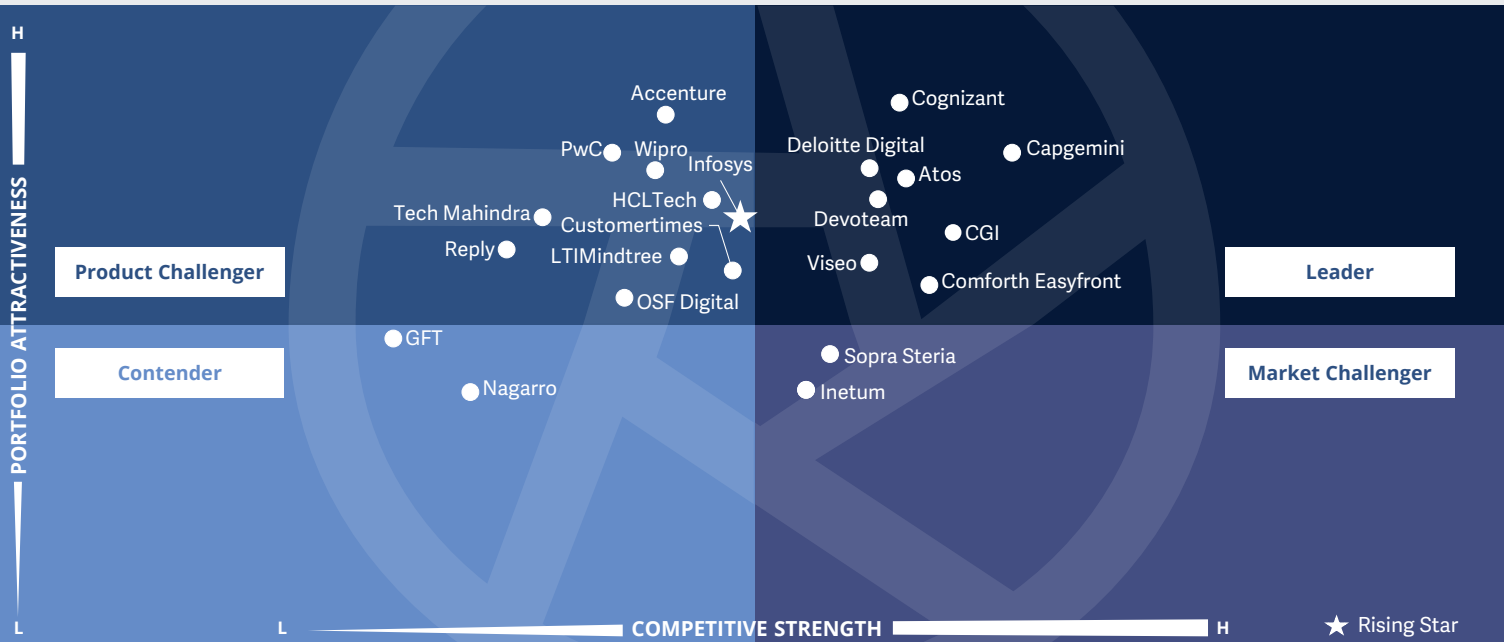


**Field service managers** should read this report to understand how service providers can help implement and expand the use of Salesforce Service Cloud to manage field service operations better.



**Salesforce Ecosystem Partners  
Multicloud Implementation and Integration Services for Large Enterprises**

France 2023



This quadrant evaluates service providers that **implement Salesforce multiclouds**, enable complex **integrations with other enterprise solutions** and provide complementary services for **large corporations in the French market**.

Marcio Tabach



## Multicloud Implementation and Integration Services for Large Enterprises

### 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** about 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 landscape
4. Availability of **predefined solutions** and accelerators, preferably both functionally oriented and industry-specific
5. Delivery **capabilities at scale** to serve large enterprise clients
6. Compelling list **of use cases and references**





## Multicloud Implementation and Integration Services for Large Enterprises

### Observations

Many large IT companies made acquisitions in France that were essential to guarantee leading positions in this market. Most target acquisitions were pure Salesforce integrators or companies with strong Salesforce capabilities and complementary services, such as MarTech.

These large IT companies have added expertise and capabilities to the acquired companies, such as experience in MuleSoft, enabling them to integrate Salesforce with corporate applications and promote world-class services.

From the 32 companies assessed for this study, 22 have qualified for this quadrant, with eight being Leaders and one Rising Star.

### Atos

**Atos** is one of the largest technology companies in France. It has strengthened its Salesforce practice in the country through acquisitions and has developed a methodology to guarantee timely and affordable project delivery.

### Capgemini

**Capgemini** is the largest technology firm and has the largest Salesforce team in the country. It has developed several accelerators and proprietary solutions that differentiate its services from others.

### CGI

**CGI** has strong competence with MuleSoft solutions and corporate application integration. The company has considerable reference cases in the public sector.

### cognizant

**Cognizant** enhanced its globally recognized Salesforce capabilities and presence in France by acquiring EI-Technologies in 2020.

### Comforth Easyfront

**Comforth Easyfront** is a French Salesforce company with one of the largest client portfolios in the country and some significant reference cases. It recently announced the acquisition of Easyfront Consulting to strengthen its Salesforce capabilities.

### Deloitte Digital

**Deloitte Digital's** deep business understanding helps its customers leverage the Salesforce architecture. The company also offers complementary services such as MarTech and integration with other marketing platforms.

### Devoteam

Headquartered in France, **Devoteam** has an extensive footprint in European countries. It recently became a privately owned company and invested heavily in marketing.

### WISEO

**WISEO** specializes in integrating corporate systems into Salesforce architecture. The company shines in B2B references cases in the country.

### Infosys

**Infosys** (Rising Star) serves either global companies in France or French companies abroad with strong integration capabilities. In France, it focuses on the energy and utility sectors.



# Cognizant



“Cognizant has built an offering in France that combines a deep knowledge of the local market and the company’s globally recognized Salesforce competence.”

*Marcio Tabach*

## Overview

Cognizant is headquartered in New Jersey, U.S., and operates in 41 countries. It has more than 349,400 employees across 162 global offices. In FY21 the company generated \$18.5 billion in revenue, with financial services as its largest segment. In 2020, Cognizant acquired El Technologies, an important Salesforce partner in France. El Technologies offers Salesforce implementation services, Microsoft solutions and managed services. It also has an institute dedicated to certified Salesforce labor training that grants more than 1,500 certifications annually.

## Strengths

**Strategic acquisition:** Cognizant established its position in the French market with the acquisition of El Technologies, which had a prominent position in the country long before the merger. El Technologies was already a Summit Salesforce Partner, with several innovation awards from the software vendor and a workforce of 380 dedicated to Salesforce services. Cognizant provides world-class services in the French market with solid local reach.

**Accelerators and methodology:** Cognizant has built more than 150 solutions and accelerators for various sectors, including insurance, utility services, healthcare and loan and mortgages. It has also developed the Atlas Framework®, a suite that includes implementation methodology, training and

tools that enable on-time and on-budget delivery. Cognizant leverages its expertise of more than 2,400 projects to implement the best practices and improve its service quality.

**Global recognition:** Salesforce has awarded Cognizant in many of its operating markets. In 2022, Cognizant received the Salesforce Partner Innovation Award for Sales Cloud. It also received the 2022 Salesforce Implementation Partner Award of the Year in France. The company was also recognized in the Netherlands and the U.K. Other institutions from the automotive and insurance sectors honored Cognizant’s solutions based on Salesforce.

## Caution

El Technologies should mention some of Cognizant’s differentiators on its website and marketing materials, such as accelerators and frameworks. This communication could strengthen the subsidiary’s brand by positioning it as a genuinely global experienced player.





# Implementation Services for Core Clouds Midmarket

## Implementation Services for Core Clouds Midmarket

### Who Should Read This Section

This quadrant is relevant to small and midsize enterprises across all industries in France that evaluate providers of implementation services for Salesforce Sales Cloud, Salesforce Service Cloud and Salesforce Commerce Cloud.

In this quadrant report, ISG defines the current market positioning of Salesforce core cloud implementation service providers in France as they expand their services throughout the European region. These providers adopt an agile approach for implementation, helping clients redesign processes and enable Salesforce applications in their environment.

Enterprises in France prefer local service providers or boutique firms that are easily reachable and can deploy Salesforce solutions such as Sales Cloud, Service Cloud, Experience Cloud, MuleSoft and Tableau analytics quickly.

In France, service providers offer preconfigured solutions, such as Sales Cloud with Incentive Management, Service Cloud with Warranty Management, Health Cloud with Community Cloud and Financial Services Cloud with Community Cloud under implementation services to cater to the increasing demand for such solutions among small and midsize enterprises.



**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.



**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.

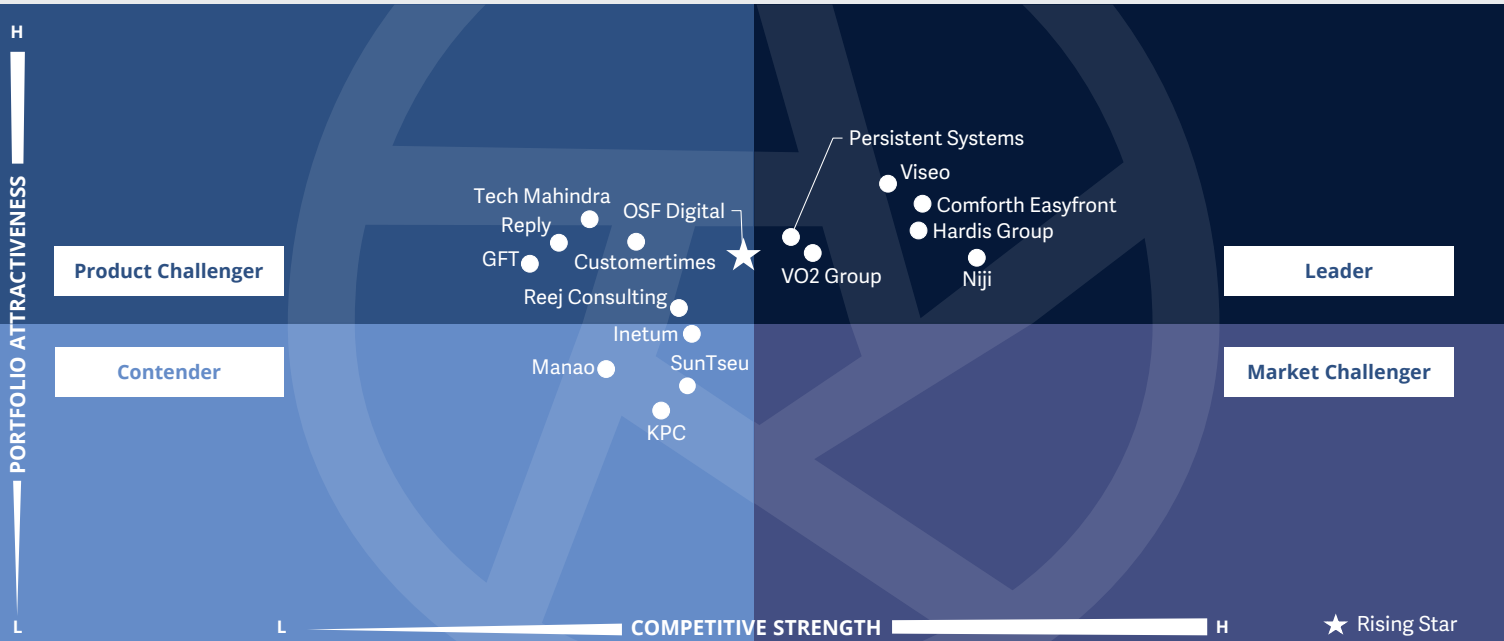


**Field service managers** should read this report to understand how service providers can help implement and expand the use of Salesforce Service Cloud to manage field service operations better.



Salesforce Ecosystem Partners  
Implementation Services for Core Clouds Midmarket

France 2023



This quadrant evaluates service providers that **implement core Salesforce clouds** for **midmarket companies in the French market**.

It assesses their key strengths, differentiators and capabilities.

Marcio Tabach



## Implementation Services for Core Clouds Midmarket

### Definition

This quadrant evaluates providers that specialize in Salesforce Sales Cloud, Service Cloud, Commerce Cloud and Community Cloud. These products are broadly considered as the core clouds of Salesforce. These providers take an agile approach to implementation and focus on cases where low levels of integration are required, which is typical for midsize and small clients. Therefore, in many cases, these projects are conducted within a few months. An important aspect of the required services revolves around consulting on the redesign of processes while using Salesforce applications. From a functional perspective, implementation services include process consulting, design, configuration, data cleansing, migration and finally the go-live support.

### Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go live**) for Salesforce Core Clouds (at least for Sales, Service and Commerce clouds)
2. Provision of **training and enabling client personnel** to use the application
3. Availability of **predefined solutions and accelerators**, preferably both functionally oriented and industry specific
4. Presence of **unique differentiators**
5. Economic stability and significant **delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**



## Implementation Services for Core Clouds Midmarket

### Observations

Most implementations for the midmarket involve out-of-the-box Salesforce solutions, where the provider must create value for its customers quickly.

Many midmarket cases related to this study require international implementations for the core cloud. Therefore, the providers must be able to implement architectures in more than one language and country.

The demand from midsized clients increased during the pandemic and has not shown signs of significant reduction since lockdowns were suspended.

From the 32 companies assessed for this study, 16 have qualified for this quadrant, with six being Leaders and one Rising Star.

### Comforth Easyfront

**Comforth Easyfront** has a deep knowledge of the French market's attributes, culture, and regulations. The company has an extensive list of clients from various sectors. Its parent company's has applied a clever acquisition strategy.

### Hardis Group

**Hardis Group** explicitly focuses on the mid-market and recently made acquisitions of Salesforce-capable companies. The company has excellent expertise in supply chain solutions and offers extensive training on Salesforce implementations.

### Niji

**Niji** is an award-winning company. It is a mix of a MarTech agency, business consultancy and technology company. It has longstanding experience and many reference cases in Salesforce implementations, particularly of core and marketing clouds.

### Persistent Systems

**Persistent Systems** has strong capabilities in Salesforce engineering and enjoys high customer satisfaction. The company has a considerable footprint and a CoE in France.

### WISEO

**WISEO** specializes in Einstein Analytics and mobile development. The company has a significant presence and well-established relationships in the French market.

### VO2 Group

**VO2 Group** has differentiated offerings for the FinTech and real estate sectors. It is one of Europe's most innovative and dynamic companies.

### OSF Digital

**OSF Digital** (Rising Star) is focused on Salesforce solutions with extensive and widespread capabilities. The company holds four commerce Salesforce Navigator badges.





Implementation Services for  
Marketing Automation Midmarket



## Implementation Services for Marketing Automation Midmarket

### Who Should Read This Section

This quadrant is relevant to small and midsize companies across all industries in France that are evaluating providers that offer implementation services for Salesforce Marketing Automation.

In this quadrant report, ISG defines the current market positioning of Salesforce Marketing Automation implementation service providers in France and how they address the key challenges enterprises face in the country. These providers focus on delivering direct, personalized customer engagement and increasing revenue through tailored communication at scale and across multiple channels. Salesforce Marketing Automation is often the entry point for Salesforce journeys. ISG observes that companies seeking implementation services in this category usually do not have complex real-time integration needs.

In France, regional service providers are leading the marketing automation midmarket by offering instant support, reliability and easy accessibility to small and midmarket enterprises.

Many enterprises that fall under the implementation services for marketing automation midmarket quadrant are specialized service providers that can complete the task in less than 50 percent of the time compared with other competitors, without disrupting ongoing projects. Providers offering MarTech services, especially those focused on design, UX, UI and campaign management, are in high demand in the French market. They are further strengthening their customization and automation capabilities through investment and acquisitions.



**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.



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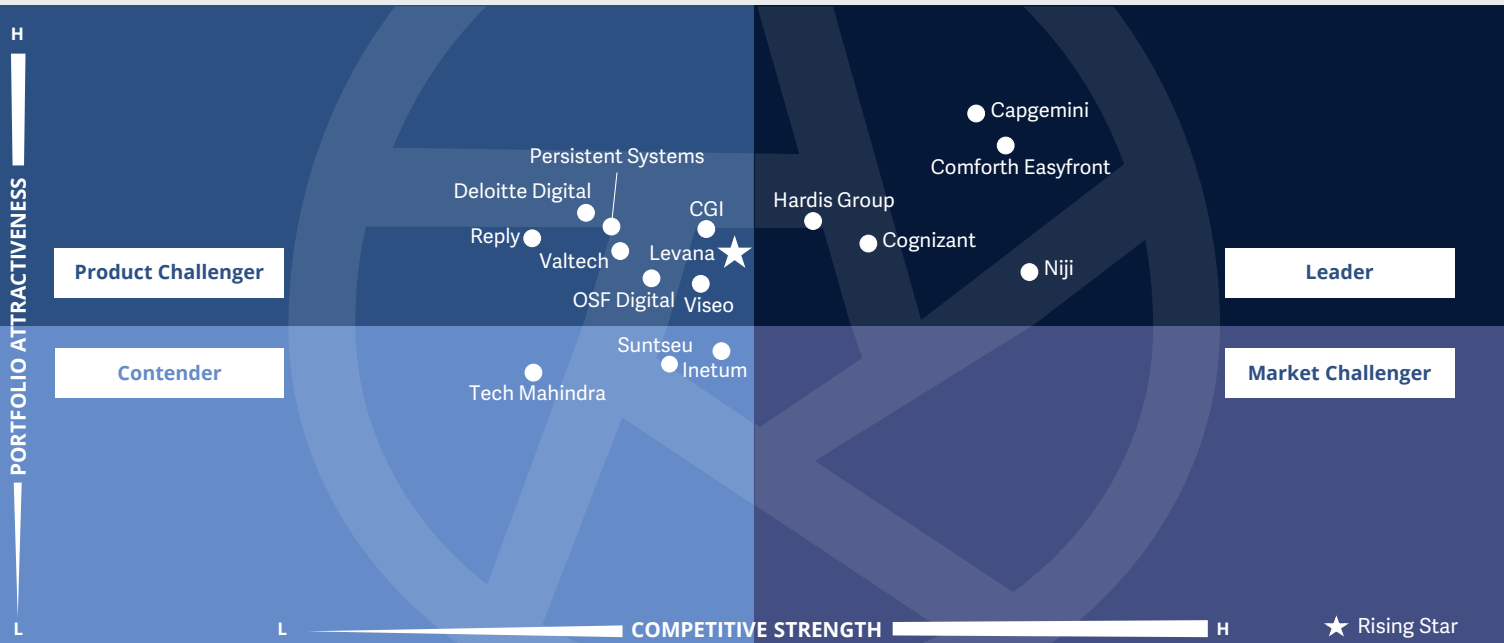


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Salesforce Ecosystem Partners  
Implementation Services for Marketing Automation Midmarket

France 2023



This quadrant evaluates service providers that **implement Salesforce marketing automation clouds** and **provide additional services for midmarket companies in the French market**. It is an assessment of their strengths, differentiators and capabilities.

Marcio Tabach



## Implementation Services for Marketing Automation Midmarket

### Definition

This quadrant includes providers that specialize in Salesforce Marketing Cloud for cases where the need for real-time integration into a complex system landscape is limited; this is more typical for midsized and small clients. In addition, provider expertise in marketing-specific aspects such as the use of media and multichannel approaches is essential. As the interaction with end clients usually implies a large volume of transactions, the automation of these functionalities – for instance, Pardot – is another important success factor in this quadrant. From a functional perspective, the implementation services include process consulting, design, configuration, data cleansing, migration and finally the go-live support.

### Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration and go live**) for the Salesforce Marketing Cloud, Pardot, and for marketing specific aspects, such as information gathering, customer experience, digital customer journey optimization and automation of customer interactions
2. Provision of **training and enabling client personnel** to use the application
3. Availability of **predefined solutions and accelerators**, preferably both functionally oriented and industry specific
4. Presence of **unique differentiators**
5. Economic **stability and significant delivery capabilities** to serve numerous Clients
6. Compelling list of **use cases and references**



## Implementation Services for Marketing Automation Midmarket

### Observations

Providers that implement Salesforce marketing automation clouds usually offer a complete set of services, including campaign management, design and UX, to help clients extract value from their platforms.

The use of data analytics is essential to map, track and segment consumer behavior and thus develop effective campaigns. Therefore, providers are implementing data analytics practices to obtain better results. These practices require the integration of Salesforce platforms into other data sources, such as the Google Marketing Platform.

From the 32 companies assessed for this study, 16 have qualified for this quadrant, with five being Leaders and one Rising Star.



**Capgemini** offers end-to-end marketing services, from Salesforce Marketing Cloud implementation to campaign management. It has a high brand reputation in France and a global footprint.



**Cognizant** has one of the most experienced teams globally in Salesforce Marketing Cloud. The company has a global presence and scale and a culture that leverages innovation.

### Comforth Easyfront

**Comforth Easyfront** specializes in integrating different marketing platforms and serving several industries, including B2C and B2B. It also offers a broad range of marketing consulting services.

### Hardis Group

**Hardis Group** attracts many midmarket clients as part of its strategy to drive growth. The company serves many IT companies and enjoys a good reputation among clients.

### Niji

**Niji** offers a broad range of marketing services, including brand strategy, design and campaign management. It has some successful large-scale project implementations and deep knowledge of the French culture and market.

### Levana

**Levana** (Rising Star) is a young company founded by former Salesforce executives. The company has strong technical knowledge of Salesforce platforms and has been growing rapidly.





“Cognizant has deep knowledge of Salesforce Marketing Cloud and has an extensive global reach. Innovation forms the core of its offerings.”

*Marcio Tabach*

# Cognizant

## Overview

Cognizant is headquartered in New Jersey, U.S., and operates in 41 countries. It has more than 349,400 employees across 162 global offices. In FY21 the company generated \$18.5 billion in revenue, with financial services as its largest segment. In 2020, Cognizant acquired El Technologies, an important Salesforce partner in France. El Technologies offers Salesforce implementation services, Microsoft solutions and managed services. It also has an institute dedicated to certified Salesforce labor training that grants more than 1,500 certifications annually.

## Strengths

### Deep knowledge of the Salesforce Marketing Cloud platform:

Cognizant leverages the expertise of more than 600 consultants dedicated to Marketing Cloud, 1,154 Marketing Cloud certifications and 1,359 Salesforce Marketing Cloud implementations. The company has developed proprietary tools and frameworks that accelerate the platform's implementation and operations and relies on subject matter experts. El Technologies in France has an ISV mapping that consolidates a vision of all solutions available on Salesforce AppExchange and helps find the right solution for Salesforce implementation.

### Operations on a global scale:

With companies disintermediating sales for distributors and selling products over the web, midmarket companies must leverage global marketing campaigns. Cognizant's sizeable global footprint can help these companies deploy marketing platforms and support campaigns overseas.

### Focus on innovation:

Under Cognizant's Levvie Awards program, one project team is rewarded financially once a quarter for developing a unique, innovative solution. The company also offers a 12-week paid Salesforce training program called Aim Higher in collaboration with Salesforce. This program was awarded the 2021 Salesforce Partner Innovation Award. Cognizant also commits to going beyond simple Salesforce implementations.

## Caution

Cognizant's American subsidiary for Salesforce Marketing Cloud has developed many important proprietary solutions that are not mentioned as offerings under El Technologies, France's Cognizant subsidiary. Highlighting these solutions on El Technologies' website will improve its brand perception.





# Managed Application Services for Large Enterprises

## Managed Application Services for Large Enterprises

### Who Should Read This Section

This quadrant is relevant to large enterprises across all industries in France that are evaluating providers of Salesforce managed application services.

In this quadrant report, ISG defines the current market positions of Salesforce managed application services providers for large enterprises in France. Conventional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring. This study covers providers offering additional services, including administrative assistance, accelerators for development and utilization, development services, proactive monitoring and advisory services. To skillfully manage their Salesforce platforms, enterprise clients prefer service providers that can keep IT costs under control and maintain platforms efficiently. They look for service providers that manage applications, licenses and upgrades, offer user support and develop business applications integrated with platforms.

France-based large enterprises with global operations prefer partnering with global providers that support deployments in France and other regions.

Service providers in France are identifying the unique requirements of enterprises regarding managed application services and are launching multiple dedicated solutions and platforms to address these needs.

ISG observes high demand for flexible commercial models such as fixed price, time and material, and Salesforce application management services (AMS) in France. Service providers are investing heavily in meeting clients' expectations.



**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.



**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.

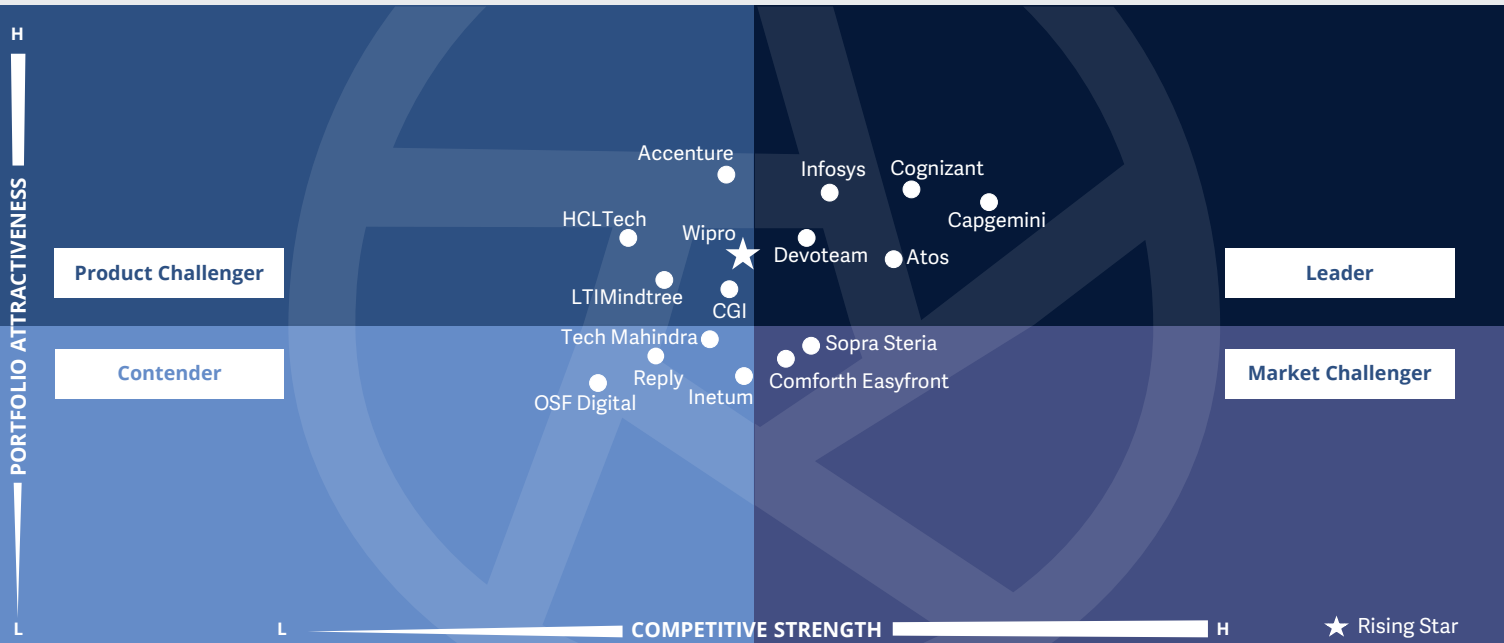


**Field service managers** should read this report to understand how service providers can help implement and expand the use of Salesforce Service Cloud to manage field service operations better.



**Salesforce Ecosystem Partners  
Managed Application Services for Large Enterprises**

France 2023



This quadrant evaluates service providers that offer **managed application services** for **large enterprises** using Salesforce clouds. These services include **maintenance, support, security, compliance** and **continuous improvement**.

Marcio Tabach





## Managed Application Services for Large Enterprises

### Definition

This quadrant evaluates providers with the capability to offer managed services for maintenance and support functions that include monitoring, remote support, centralized management of Salesforce applications, data quality management, data security and compliance-related aspects. In the case of large enterprise clients, this usually includes the providers' capability to offer these services in the context of global reach and complex application landscapes, which comprise a variety of solutions from different software providers. Another important aspect is the continuous improvement of the solutions to generate additional value for the underlying business. Managed services are characterized by the transfer of responsibilities to a service provider and are driven according to defined SLAs.

### Eligibility Criteria

1. Well-proven experience in operational support for end-to-end processes across **complex application landscapes**, with specific focus on Salesforce products
2. Availability of **strong methodology** and comprehensive tool support with high degree of automation
3. **Delivery capabilities** at scale to serve large enterprise clients
4. Provision of **mature pricing and contract models** with focus on outcome-based approaches and continuous improvement
5. Compelling list of **use cases and references**



## Managed Application Services for Large Enterprises

### Observations

Leaders in this quadrant have shown their capability to keep systems running without interruptions and to enable continuous improvements. This practice of continuous integration/continuous deployment (CI/CD) is the new norm in managed application services because any disruption in Salesforce clouds may cause a loss of business and revenue.

A fundamental element of continuous improvement is using predictive models based on ML that can identify standards in system flaws and take corrective actions. These actions can be automatically replicated in different geographies and systems instances.

From the 32 companies assessed for this study, 16 have qualified for this quadrant, with five being Leaders and one Rising Star.

### Atos

**Atos** offers comprehensive managed services. The company has many onsite locations in France and Europe and enjoys a good reputation for its managed application services and longstanding contracts.



**Capgemini** uses the Capgemini Intelligent Automation Platform (CIAP) to predict system incidents and promote predictive actions. The company also has deep expertise in working with Salesforce Clouds.



Salesforce recognizes **Cognizant** as an innovative company that develops several solutions to enhance its managed services. It has offices in France for customer support and uses a vertical approach to anticipate its customers' needs accurately.

### Devoteam

**Devoteam** offers extensive managed services through a CoE in France and 10 other locations to cater to its customers. The company has strong competencies in integrating MuleSoft applications and works with IT Infrastructure Library (ITIL) methodologies.



**Infosys** is highly knowledgeable in corporate platforms and enables trusted integration. The company offers automated testing solutions called Panaya ForeSight to test and assess the change impact of applications.



**Wipro** (Rising Star) offers highly flexible contract schemes and proprietary solutions such as Purvue and Holmes™ that bring economic transparency to projects and automate processes and enhancements to Salesforce systems.





“Cognizant provides innovative and industry-oriented solutions through its managed application services. It has a front office in France to support its local clients.”

*Marcio Tabach*

# Cognizant

## Overview

Cognizant is headquartered in New Jersey, U.S., and operates in 41 countries. It has more than 349,400 employees across 162 global offices. In FY21 the company generated \$18.5 billion in revenue, with financial services as its largest segment. In 2020, Cognizant acquired EI Technologies, an important Salesforce partner in France. EI Technologies offers Salesforce implementation services, Microsoft solutions and managed services. It also has an institute dedicated to certified Salesforce labor training that grants more than 1,500 certifications annually.

## Strengths

### **Vertically aligned managed services:**

Cognizant has various managed services practices dedicated to specific industries such as retail, consumer packaged goods and healthcare. This approach leverages its Salesforce competence and industry knowledge to identify critical incidents and customers’ disruption operations. This approach can help Cognizant foresee incidents that may occur in each industry.

**Local front office:** EI Technologies, Cognizant’s subsidiary, has capabilities to serve customers in France. While the front office for managed services is in France, the back office is in Lebanon. This front office, with local language support, is key to convincing prospective clients in the country.

### **Committed to innovation:**

Cognizant has developed several accelerators and frameworks to enhance Salesforce managed services. It uses these frameworks for Salesforce clouds, ISVs and complementary solutions, such as bots and automation. Some examples are Zero Maintenance Framework™, using chatbots as UI and AMS in a Box. In 2022, Cognizant won the Salesforce Partner Innovation Award for Sales Cloud for the 9th Consecutive awards since 2014.

## Caution

Cognizant offers managed services at its corporate level and through its subsidiary EI Technologies. The company should clarify the differences between the two entities and their offerings to alleviate any confusion among its French clients with operations abroad.





# Managed Application Services for Midmarket

## Managed Application Services for Midmarket

### Who Should Read This Section

This quadrant is relevant to large enterprises across all industries in France that are evaluating providers of Salesforce managed application services.

In this quadrant report, ISG defines the current market positions of Salesforce managed application services providers for large enterprises in France. Conventional managed services primarily include outsourcing activities such as onsite or remote support and application monitoring. This study covers providers offering additional services, including administrative assistance, accelerators for development and utilization, development services, proactive monitoring and advisory services. To skillfully manage their Salesforce platforms, enterprise clients prefer service providers that can keep IT costs under control and maintain platforms efficiently. They look for service providers that manage applications, licenses and upgrades, offer user support and develop business applications integrated with platforms.

France-based large enterprises with global operations prefer partnering with global providers that support deployments in France and other regions.

Service providers in France are identifying the unique requirements of enterprises regarding managed application services and are launching multiple dedicated solutions and platforms to address these needs.

ISG observes high demand for flexible commercial models such as fixed price, time and material, and Salesforce application management services (AMS) in France. Service providers are investing heavily in meeting clients' expectations.



**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.



**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.

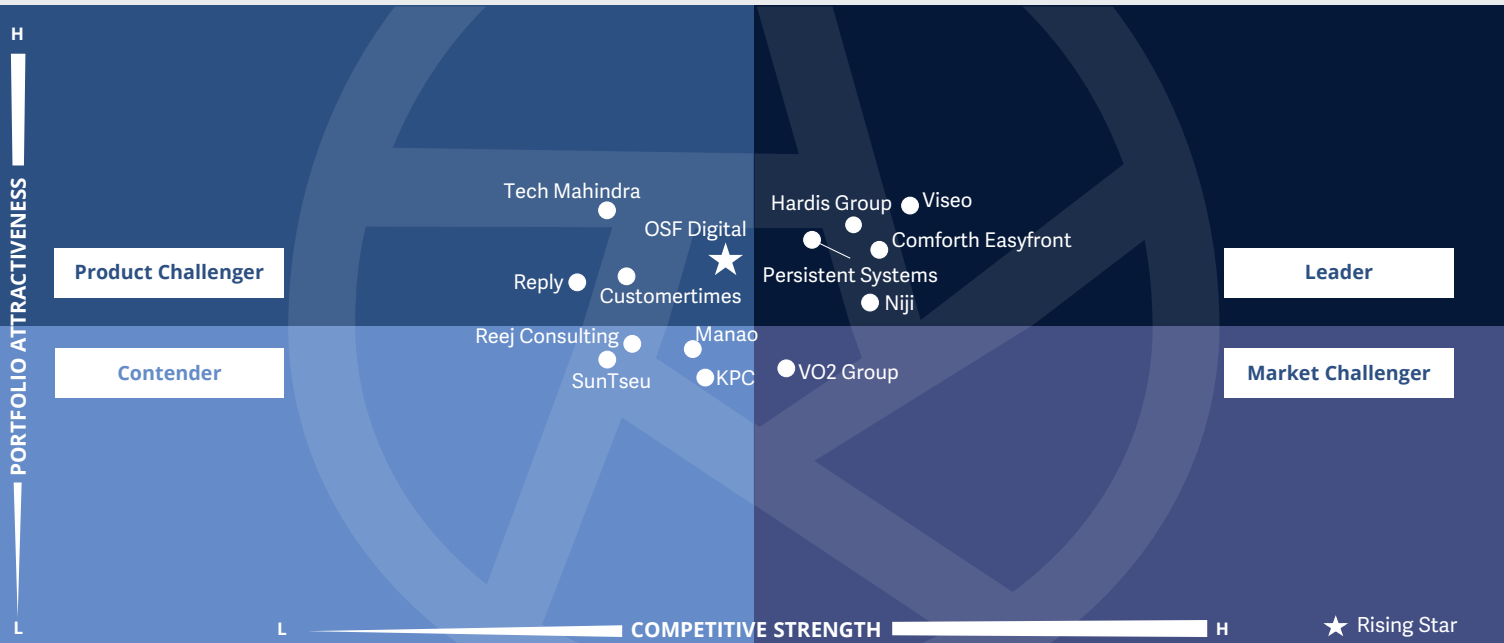


**Field service managers** should read this report to understand how service providers can help implement and expand the use of Salesforce Service Cloud to manage field service operations better.



Salesforce Ecosystem Partners  
Managed Application Services for Midmarket

France 2023



This quadrant evaluates **service providers** offering **managed application services** using Salesforce clouds to **midsize companies**. These services include **maintenance, support, security, compliance, and continuous improvement**.

Marcio Tabach



## Managed Application Services for Midmarket

### Definition

This quadrant focuses on the capability of providers to offer managed services for maintenance and support functions that include monitoring, remote support, centralized management of Salesforce applications, data quality management, data security and compliance-related aspects. The midmarket clients usually have lower integration requirements and, in many cases, have a more regional focus. Another important aspect is the continuous improvement of the solutions to generate additional value for the underlying business. Managed services are characterized by the transfer of responsibilities to a service provider and are driven according to defined SLAs.

### Eligibility Criteria

1. Well-proven experience in **operational support for application landscapes** with specific focus on Salesforce products
2. Availability of **strong methodology and comprehensive** tool support, 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 focus on outcome-based approaches and continuous improvement
5. Compelling list of **use cases and references**



## Managed Application Services for Midmarket

### Observations

Companies are enhancing their offerings with services such as campaign management, search engine optimization (SEO) management, content and design.

Midsized French customers tend to prefer companies offering French language support, either from locations that are either onshore or in former French territories. Some of the providers that fulfill these requirements have contracts that date back years.

From the 32 companies assessed for this study, 14 have qualified for this quadrant, with five being Leaders and one Rising Star.

### Comforth Easyfront

**Comforth Easyfront** offers comprehensive managed services using either Salesforce products, AppExchange ISV or third-party software. The company also counts on other Magellan Partners Group subsidiaries to enhance its security and integration services.

### Hardis Group

**Hardis Group** provides local support in many European countries owing to its extensive footprint in the region. The company also offers modular contract schemes and Salesforce architecture audits.

### Niji

**Niji** has a dedicated division for cybersecurity that embeds its offerings in Salesforce managed services. The company also offers managed services for data operations (DataOps) to help clients extract value and insights from their Salesforce platforms.

### Persistent Systems

**Persistent Systems** enjoys high levels of customer satisfaction and counts on its highly experienced and qualified team. The company has proprietary solutions for the DevOps framework and no-code test automation.

### WISEO

Salesforce recognizes **WISEO** for its managed services. The company has onsite and nearshore AMS centers, and both can provide support in French. WISEO also has long-term clients for managed services.

### OSF Digital

**OSF Digital** (Rising Star) supports its customers by either addressing their technical issues or enabling business improvements. It provides staff augmentation for managing Salesforce platforms. It offers innovative solutions and has been growing in the French market.







# Implementation Services for Industry Clouds

## Implementation Services for Industry Clouds

### Who Should Read This Section

This report is relevant to enterprises across all industries in France that are evaluating service providers offering implementation services for industry clouds. In this quadrant report, ISG defines the current market positions of the service providers in France and how they address the critical challenges associated with implementing industry clouds for Salesforce products in the country.

This quadrant includes providers of implementation services focused on industry cloud products of Salesforce, such as Financial Services Cloud and Health Cloud. Industry-specific skills and appropriate accelerators are essential factors for success in this segment. Furthermore, service providers must be able to develop comprehensive solutions based on the various Salesforce products relevant to specific client needs.

With Salesforce verticalizing its offerings further, this topic will become a high priority in future implementations. From a functional perspective, implementation services include process consulting, design, configuration, data cleansing, migration and finally, go-live support.

In France, service providers are automating their industry-specific clouds to deploy with minor customization for specific industry cloud enterprises. Financial services, energy, manufacturing, media, automotive, healthcare, retail, government and hi-tech industries are emerging markets in the region, and Salesforce industry cloud solutions that are ready to implement with a few/minimum customizations are driving the French market.

ISG observes that large service providers are investing in vertical solutions to leverage their industry knowledge, whereas smaller providers still lag in adopting industry-specific 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.



**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.

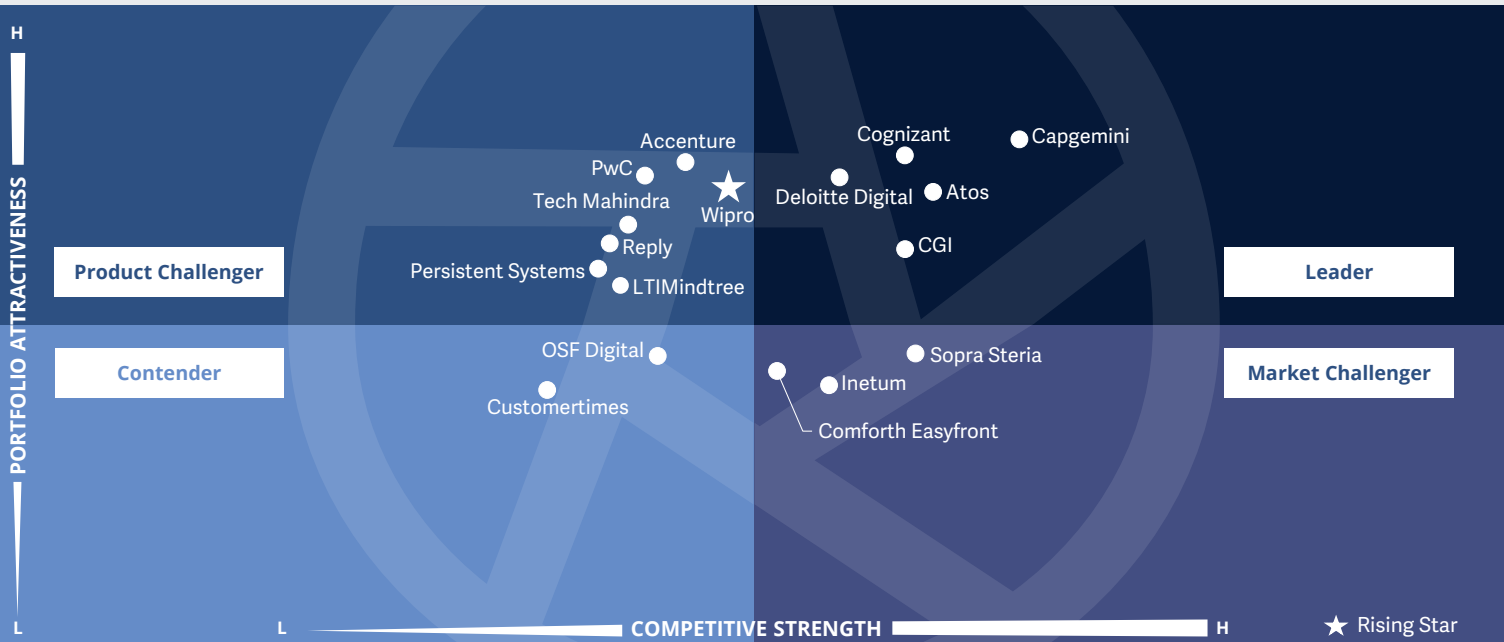


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Salesforce Ecosystem Partners  
Implementation Services for Industry Clouds

France 2023



This quadrant evaluates service providers that **implement Salesforce industry clouds**, such as Financial Services Cloud and Health Cloud, **in the French market**. It is an assessment of their **strengths, differentiators and capabilities**.

Marcio Tabach



## Implementation Services for Industry Clouds

### Definition

This quadrant includes providers of implementation services that are focused on industry cloud products of Salesforce such as Financial Services Cloud and Health Cloud. Industry-specific skills and appropriate accelerators are important success factors for this segment. Furthermore, service providers need the capability to develop comprehensive solutions based on the various Salesforce products that are relevant in a particular client situation. With Salesforce currently moving its offerings toward higher verticalization, this topic will become a high priority in future implementations. From a functional perspective, the implementation services include process consulting, design, configuration, data clean-up, migration and finally the go-live support.

### Eligibility Criteria

1. Well-proven **domain expertise** for respective industries
2. Strong implementation capabilities (**consulting, configuration, data migration, go live**) for the Salesforce industry cloud products and the products provided by Vlocity (recently taken over by Salesforce)
3. Deep knowledge of the **Salesforce data architecture**
4. Presence of **unique differentiators**, for example, proven industry-specific Accelerators
5. **Economic stability and significant delivery capabilities** to serve numerous clients
6. Compelling list of **use cases and references**



## Implementation Services for Industry Clouds

### Observations

Most large technology companies segment their services by verticals. This approach helps them better serve their clients. These large IT companies add Salesforce industry clouds to their already verticalized offerings and differentiate themselves based not only on technology expertise but also on industry knowledge and understanding.

Some companies offer solutions that address business problems regardless of whether it is a Salesforce solution or an integration of a third-party platform with Salesforce.

The industry cloud solutions will define personalized CX for companies in this space. Therefore, industry clouds are a promising source of differentiation, as providers can apply specialized knowledge about specific industries. On the other hand, many Salesforce partners that serve the midmarket will not have the chance to implement industry solutions and may run the risk of having a commoditized offering with lower margins.

From the 32 companies assessed for this study, 17 have qualified for this quadrant, with five being Leaders and one Rising Star.

### Atos

**Atos** undertakes a verticalized approach to understanding an industry's critical issues. The company designs Salesforce architectures using several AppExchange ISVs. It also has two Net Zero Transformation Centers of Excellence (CoEs) in France.

### Capgemini

**Capgemini** has extensive experience with Vlocity and industry-specific solutions. The company has four implementations of Net Zero Clouds and has a division that studies the behavior of modern customers in many industries.

### CGI

**CGI's** proximity model enables it to deliver services through its 24 offices in France and leverage its global footprint for a specialized technological solution. The company had double-digit growth in France and acquired Umanis in 2022, a sizeable French technology company.

### cognizant

**Cognizant** has extensive reference cases for AppExchange industry solutions, such as Veeva, and its proprietary industry solutions. The company has a broad and effective program to attract, retain and qualify talent.

### Deloitte Digital

**Deloitte Digital** has deep expertise in diverse industries owing to its management consulting practice. The company has established a special division to develop and promote its Salesforce solutions. It combines its audit and digital divisions to develop Net Zero projects.



**Wipro** (Rising Star) uses a "talent as a service" platform to quickly hire professionals from diverse backgrounds and skills. The company develops industry-specific solutions based on market research and is a founding member of the Transform to Net Zero coalition.



# Cognizant



“Cognizant has many reference cases of industry solution implementations that are either market available or proprietary solutions. It has a highly effective labor qualification program to guarantee delivery capacity.”

*Marcio Tabach*

## Overview

Cognizant is headquartered in New Jersey, U.S., and operates in 41 countries. It has more than 349,400 employees across 162 global offices. In FY21 the company generated \$18.5 billion in revenue, with financial services as its largest segment. In 2020, Cognizant acquired EI Technologies, an important Salesforce partner in France. EI Technologies offers Salesforce implementation services, Microsoft solutions and managed services. It also has an institute dedicated to certified Salesforce labor training that grants more than 1,500 certifications annually.

## Strengths

**Aim Higher talent program:** Cognizant’s Aim Higher is a 12-week paid training program that covers business and consulting fundamentals, IT and cloud basics focusing on the Salesforce platform. This program is an effective strategy to guarantee the supply of qualified labor and to increase Cognizant Salesforce badges assessment.

**Impressive set of proprietary industry solutions:** Cognizant has built its proprietary solutions for Salesforce industry clouds with successful implementations. Some examples are InsurEleVate (insurance), Utility Next (utilities), supplier relationship management (retail) and MedVantage. The latter has won the Worldwide Business Research (WBR) Award for Innovation in the Delivery of Field Services and Repair for Medical Devices.

## Extensive use of market industry solutions:

Cognizant is competent in using market-available solutions to enhance its industry Salesforce solutions. It uses Vlocity solutions mainly for the media and telecom, healthcare, insurance and utility sectors. The company is also adept at using nCino for the Financial Services Cloud and Veeva for the Healthcare Cloud. In the latter case, the company won the Preferred Services Partner award in 2022.

## Caution

Cognizant has an impressive set of solutions and reference cases in the healthcare sector. However, the company does not mention any references in this sector in France. Cognizant should use its know-how to develop and publicize reference cases in the French healthcare sector.





# Appendix

The ISG Provider Lens™ 2023 – Salesforce Ecosystem Partners analyzes the relevant service providers in the French market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

**Lead Author:**

Marcio Tabach

**Editors:**

Upasana Hembram and John Burnell

**Research Analyst:**

Puranjeet Kumar

**Data Analyst:**

Sibasis Panigrahy

**Consultant Advisor:**

Yadu Singh

**Project Manager:**

Monika Kathuria

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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





*Author*



**Marcio Tabach**  
**Lead Analyst**

Marcio Tabach is an experienced management consultant, having led numerous assignments for multinationals and major local companies in Brazil in the past 14 years.

Currently, he is the Lead Analyst for ISG Analytics Services & Solutions, MarTech e Salesforce Ecosystem. He has experience in complex data analysis, cross-referencing data and the use of various analytic tools in order to support clients' strategic decisions. Previously, he has held marketing management positions in large companies within consumer goods and services. In addition to his experience, Marcio has

also been a guest lecturer in graduated management courses in Brazil. He holds a Full-Time MBA degree from the London Business School, two bachelor's degrees from renowned Brazilian business schools and a data scientist certification. He is native in Portuguese, fluent in English and has professional working proficiency in French

*Research Analyst*



**Puranjeet Kumar**  
**Senior Research Analyst**

Puranjeet Kumar is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Next-Gen ADM Solutions & Services and Salesforce Ecosystem. He supports the lead analysts in the research process and authors the global summary report. Puranjeet also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Prior to this role, he worked across several syndicated market research firms and has more than eight years of experience in research and consulting, with major areas of focus in collecting,

analyzing, and presenting quantitative and qualitative data. His area of expertise lies across various technologies like 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](#).

### ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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### ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

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](http://isg-one.com).





**MARCH, 2023**

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**REPORT: SALESFORCE ECOSYSTEM PARTNERS**