



capioIT

Salesforce Global Systems
Integration and Services
Providers Capture Share
Report - 2024

FOCUS POINTS

- > Salesforce continues to be the benchmark for the global SaaS and customer experience marketplace. This benchmark has consistently been in place for several years and is expected to continue.
- > Salesforce's revenue for FY2024 is estimated at US\$34 billion, with a growth rate of 12% in constant currency. The company has approximately 73,000 employees. From a financial perspective, Salesforce achieved a 30% non-GAAP operating margin in recent quarters, up from 22% in FY2023, underscoring the success of its cost-saving initiatives.
- > In previous years, Salesforce has spent substantial amounts on acquisitions; in 2024, the approach was more targeted at solving specific client issues than massive acquisitions such as Slack or MuleSoft. The largest was of Salesforce backup specialist Now for \$1,9B in late 2024.
- > The Slack strategy in 2024 has become increasingly nuanced as the company understands the impact of Microsoft Teams on enterprise technology. It has increased its focus on solving specific business collaboration issues, clearly improving the strategic value to client organisations.
- > The significant announcement at Dreamforce in 2024 was, of course, Agentforce. Agentforce, to paraphrase CEO and Founder Marc Benioff, is a response to the fact that AI agents represent a transformative leap, autonomously performing tasks, driving innovation, boosting productivity, and unlocking unprecedented scalability while requiring ethical oversight.
- > This transformation of customer experience to meet the rise of AI, specifically the buzz of GenAI, is impacting all customer experience vendors. Agentforce will be a powerful tool for consumer-based enterprises to maximise efficiency in the customer experience provided to their clients.
- > Salesforce entered 2023 with some uncertainty and potential headwinds. By late 2024, Marc Benioff and the Salesforce leadership team had effectively managed these headwinds. Salesforce has regained a focus on profitability and become more disciplined in its approach to the market.
- > As has been the case for the past years since the onset of COVID, the headwinds for the global economy continue to rise. Economic growth is difficult for most organisations in most industries. At the same time, public sector agencies are suffering from budgetary, employee and political issues that reduce their ability to invest in digital solutions. Interest rates are high in most markets, geo-political instability appears contagious, and the threat to global trade is a fundamental challenge for all companies globally. What has been successful will only work in the present. Changing an organisational culture to reflect this mindset is difficult at the best of times.

- > From a product and functional perspective, Salesforce clients face two significant challenges: pricing and integration complexity. Both reflect an organisation that has continued to expand its capabilities and offerings to clients. Salesforce needs to proactively manage these to reduce the time to outcome and enhance value generation through ease of calculation.
- > One of the critical issues enterprises face in the current cloud era is the need for Integration across platforms. This is true for Salesforce, SAP, AWS, or any other platform; They are not designed to operate in isolation. Increasingly, enterprises require that customers integrate across platforms to provide maximum return and value generation from investments in technology. It is the role of SI's, the platforms and the enterprise itself to ensure this happens.
- > No discussion of the Salesforce ecosystem can be complete without significant reference to the skills issues. These issues were present in 2014, remain present in 2024, and are anticipated to remain present in 2034. Salesforce has been committed to managing these issues. Trailhead is the benchmark platform for managing and learning. The challenge is the growing ecosystem; skills are in high demand for a range of platforms, and the recent growth of Google Cloud and ServiceNow has only exacerbated this problem.
- > From the System Integrator (SI) perspective, the Salesforce ecosystem is the largest and most significant annual opportunity growth of any pure SaaS provider. Organically or through acquisition, most major SI's investment in the Salesforce ecosystem is a crucial priority alongside the AWS and Azure ecosystems. They represent the most significant growth opportunities and have accelerated business relevancy and measurable outcomes.
- > Consolidation has slowed in the Salesforce ecosystem as the challenges of 2023 play out, the cost of capital remains an issue, and the overall economic and geo-political uncertainty remains. Acquisitions are much more specific and tend to be in place to fulfil a niche requirement based on the product of geography. The future is not so clear. SI's, particularly the top 12 or so GSIs, are under substantial business and competitive pressure. Something must give in the space, so it is going to be very interesting to watch what the outcome is likely to be.
- > The end users or a customer's customer are crucial to optimising Salesforce solutions. Vendors who genuinely understand these users drive successful Salesforce implementations. This requires direct engagement—onsite with clients to observe and understand how the technology is applied. The same expectation applies to Salesforce itself, as clients often express the need for it to stay closely aligned with their needs and the broader market context.
- > Accenture continues to enjoy overall leadership in the market. Fortunately, it is not a static environment. Deloitte and PwC maintain their leading capabilities to challenge Accenture, and Infosys has successfully leveraged substantial acquisitions to become a key provider. The other leading 2024 capioIT Capture Share report providers include IBM, Wipro, and Capgemini. In 2024, Slalom and HCLTech joined the leadership group, increasing their growth and capability. The remaining vendors understand the opportunity

in front of them. They will be working hard to ensure they can challenge for leadership as the market evolves and matures.

> capioIT included 23 vendors in the study. The growth in vendors from 19 in the previous version of the report is a positive reflection of the sales ecosystem's development and increased maturity. Newly included vendors included McKinsey, KPMG and Coforge.

HOW CAPIOIT MEASURES VENDOR CAPABILITY IN THE GLOBAL SALESFORCE SYSTEMS INTEGRATION AND SERVICES PROVIDERS MARKETPLACE

A Capture Share report is the established methodology capioIT uses to rank providers across various technology and business services sectors in global and other geographic markets. The report's output is an objective, market-based analysis of selected service providers' 17 key capabilities and attributes.

These attributes are focused on two key areas: Transform and Leverage. In simple terms, transform is a vendor's ability to engage and create processes and more substantial measurable business outcomes for clients. Leverage is focused on working in a broad, integrated ecosystem and providing scale to develop and measure client outcomes.

To ensure the integrity of the analysis and data, the individual attributes are weighted in percentage based on the overall influence of the Transform and Leverage capabilities.

Data and process integrity are critical components of a report of this type. Fundamentally, the data must be valid and untarnished. To ensure integrity, all information for measuring and assessing these attributes comes from various accurate sources. Sources of information include buyers of Salesforce services solutions globally, vendor briefings and meetings, media sources, the Salesforce ecosystem, and specific end-user feedback from a range of customer sizes, use cases, and attributes.

The following table defines each attribute and provides its weighting in the analysis. Note that in 2024, the Leverage measures have slightly changed. These changes reflect a changing market with increased integration capabilities and process automation for Salesforce deployment. Weighting has also changed slightly. Sales Team Strength has become Client Team Capability, In-country Geographic Reach has become In-Market Capability, and Country localisation has become Process Automation. These reflect the importance of a team approach to client delivery regardless of the role, from sales to project management and programming. These changes have ensured the alignment of the analysis to the development of business outcomes by the SI community.

The transform measures have stayed the same.

Leverage Attribute	Definition	Weighting
Customer Satisfaction	Customer Satisfaction sourced from customer discussions and Salesforce AppExchange etc.	20%
Solution Portfolio Depth	Depth of offerings across customer requirements for Salesforce	15%
Certified Salesforce Professionals	Dedicated Certified Salesforce professionals globally	15%
Country Strength	Depth, maturity and capability of country subsidiary	10%
Client Team Capability	Quality, depth of sales, delivery and management teams and engagement	10%
Delivery Partnerships	Partnerships to deliver to client requirements globally	10%
In Market Capability	Breadth of country based geographic capabilities	10%
Country localisation	Offerings designed for the local market	10%
Total		100%

Transform Attribute		Weighting
Internal R&D	Internal R&D focused on Salesforce related Services	10%
Leverage Salesforce R&D	Platform to leverage Partner Salesforce R&D	10%
Salesforce Ecosystem Partnership	Depth of partnerships in the Salesforce ecosystem	15%
Global Solution Development	Development of portfolio offerings that are global in scope and capability	5%
Industry Solution Development	Development of industry specific solutions for clients	15%
Country Solution Development	Strength and quality of client outcomes from engaging the provider	5%
Salesforce Platform Implementation	Investment in Salesforce platforms and related services	20%
Strength of Brand	Reputation and credibility of brand in the local and global marketplace	12%
Ability to influence external market	Strength of the provider to create market awareness and influence	8%
Total		100%

The following section highlights the leadership in each of the 17 attributes included in the report. The vendor next to an attribute represents the highest-ranked vendor for that attribute. It highlights that leadership is spread across multiple vendors for some factors, e.g., Leverage Salesforce R&D, whereas leadership rests with one vendor for other factors, such as Customer Satisfaction.

RANKING THE GLOBAL SALESFORCE SYSTEMS INTEGRATION AND SERVICES PROVIDERS

The Salesforce services market has innovation, scale and momentum across the spectrum from consulting, integration, and increasingly, albeit off a small base, managed services solutions. Salesforce has experienced substantial growth in recent years; revenue has doubled from 2019 to 2022, and the value of the ecosystem has increased at an even greater rate. This acceleration in value and opportunity has been driven by the increased strategic importance of Salesforce in the enterprise operated by the need for a complete end-to-end customer experience capability, mainly as a result of the changes in business and government service and product delivery as a result of the COVID pandemic and subsequent challenges. As 2023 begins, most SI's with mature and leading capabilities are placing the strategic importance of their Salesforce Platform investments on a similar pedestal to AWS and Azure. For many, if forced to choose, the Salesforce Platform remains more strategically and financially crucial than Oracle, with growth at a multiple when Salesforce is compared with Oracle.

Consolidation is now much more focused on filling specific geographic or solution capabilities. For example, in 2021, IBM acquired 7 Summits and Waeg to fulfil particular requirements for the overall IBM strategy from a consulting perspective around AI and the cloud.

capioIT carefully selected 23 significant providers in the Global Salesforce Systems Integration and Services Providers to undertake a Capture Share addressing the competitive environment of the Global Salesforce Systems Integration and Services Providers marketplace. This is a rise in vendor numbers and reflects the increased investment in the platform and the competitive nature of the ecosystem. For more details on the Capture Share methodology, please see Appendix 1.

The following vendors were included in the analysis:

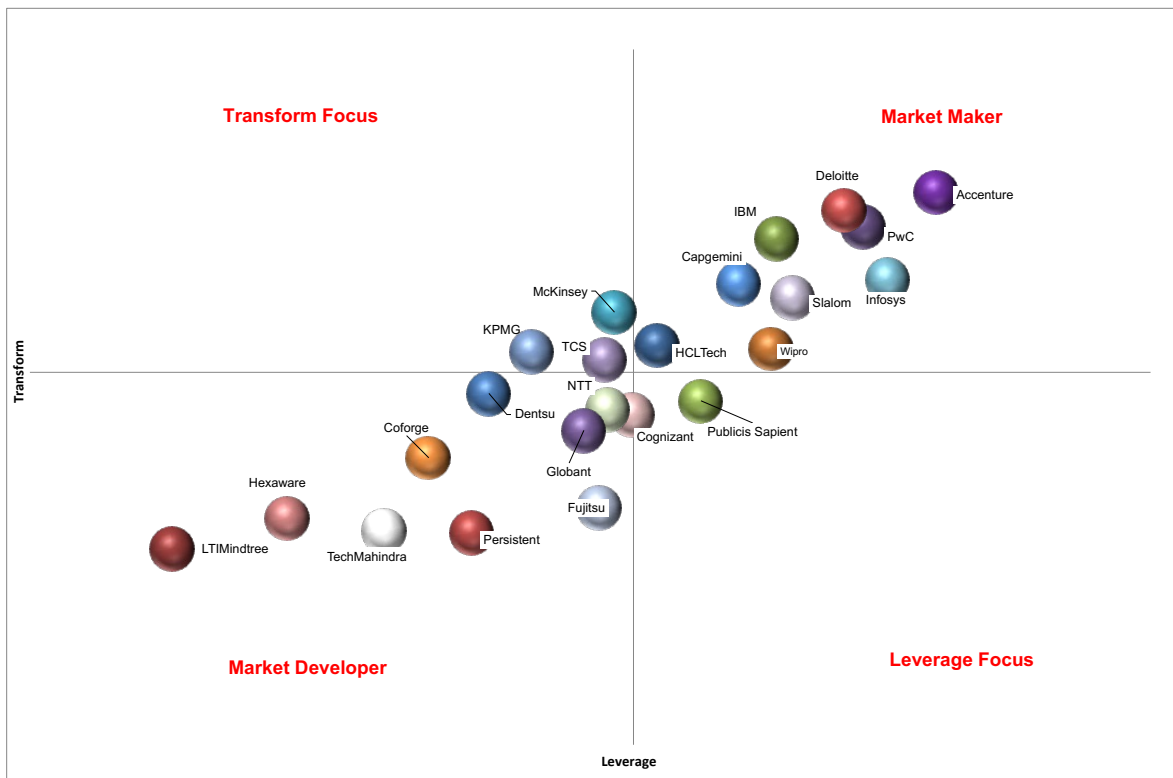
- Accenture
- Capgemini
- Coforge
- Cognizant
- Deloitte
- Dentsu
- Fujitsu
- Globant
- HCLTech
- Hexaware
- IBM
- Infosys
- KPMG
- LTIMindtree
- McKinsey
- NTT
- Persistent
- Publicis Sapient
- PwC
- Slalom
- TCS
- TechMahindra
- Wipro

The growth in the Salesforce SI market reflects the addition of several new vendors to the analysis in 2024. Perhaps most notable is McKinsey, which has become much more

prominent and visible in its work with crucial cloud platforms in the SaaS and IaaS space. Other new vendors included KPMG, Coforge, and Hexaware.

The chart below highlights the Capture Share results. It is exciting that the 2024 market for Salesforce has welcomed new providers to the leadership Market Maker position on the grid. From a global perspective, Slalom and HCLTech have both graduated to the leadership position.

The leaders at the top of the Market Maker grid remain the same. However, there have been noticeable movements between the leading providers as their capabilities evolve alongside the Salesforce platform. Accenture has maintained leadership with Deloitte, PwC, and Infosys, and it is close to IBM, Slalom, and Capgemini. The remaining leaders are Wipro, Slalom, and HCLTech. Cognizant has fallen from leadership to become a Leverage Focus organisation.



The top three vendors, Accenture, Deloitte, and PwC, have consistently worked to provide genuine innovation-based and clearly defined business outcomes for clients. They differentiate based on the depth of their relationship with change-makers in their client base, the overall business technology industry and engagement at a senior level with Salesforce. It is more than capacity; it is the ability to transform client-customer experiences. It is fundamental for the automation of solutions as the shift towards AI, driven at Salesforce by AgentForce, accelerates. Accenture, alongside Deloitte and PwC, excels in cultivating high-level, strategic relationships with client leadership, enabling these firms to deliver tailored, outcome-focused solutions consistently globally. These three firms

maintain a robust, aligned approach to transformation initiatives, leveraging cloud platforms to address complex business challenges across industries.

Following these three are Infosys, IBM, Wipro, Capgemini, Slalom and HCLTech. All these leaders have strong capabilities and provide solutions across various enterprises, geographies, and offerings. They all offer differentiated solutions and have continued to invest in a direct relationship with Salesforce, which was slightly challenged in 2023 but has improved substantially in 2024. This reinvigoration will need to continue to accelerate if AgentCloud and Salesforce itself can meet their full potential and continue to stave off any competitive threat. All have built stronger relationships with Salesforce to ensure they remain relevant in the market. It is important to note that all vendors included in the study have strong capabilities and are investing in Salesforce as a platform. With a limited number of vendors included in the platform, if you make the Capture Share shortlist, you are capable and have a genuine role in developing the salesforce ecosystem.

The chart highlights the four possible positions on the Capture Share, with the axis of transform and leverage delineating the ranking. The axes are based on the average scores across all rankings. For example, a vendor ranked as a Market Maker scored above average on the transform and leverage attributes. A Leverage Focus vendor is above average for the leverage attribute, and so on.

Vendors Rated as Market Maker

- Accenture
- Capgemini
- Deloitte
- HCLTech
- IBM
- Infosys
- PwC
- Slalom
- Wipro

Vendors Rated as Transform Focus

- KPMG
- McKinsey
- TCS

Vendors Rated as Leverage Focus

- Publicis Sapient
- TCS

Vendors Rated as Market Developer

- Cognizant
- Coforge

- Dentsu
- Fujitsu
- Globant
- Hexaware
- LTIMindtree
- Persistent
- TechMahindra

Accenture leads from a certification perspective. With over 770,000 employees, it has a scale that is difficult to match across all the major cloud platforms. Selected vendors are catching up from a certification perspective, but Accenture's model is suited to a significant reliance on people-based solutions. Other vendors, such as IBM, HCLTech, and Slalom, are increasing their certified resources, but there is a war for certified talent.

This will be upended in the future if potential and plans for AI come to fruition. It will not necessarily be about the number of human resources available but the ability to provide capabilities at scale by combining humans with AI-based Agents. This is the business objective of AgentForce and AI, more broadly in the customer experience world. It will upend the competitive advantage of providers focused on providing scale from a human resource perspective.

The capability gap has shrunk significantly when we look at the individual vendors through a direct competitive lens. Leadership is not as clear-cut as it has been in the past, and new vendors such as McKinsey and KPMG have leveraged their strengths quickly and provided differentiated capabilities. While there is overlap, as the Salesforce platform has matured and increased in scope, we are seeing an increased focus on crucial specific Salesforce offerings, be they particular clouds, industries, MuleSoft, and with an eye to the future GenAI and AgentForce. As a result, there is room for all vendors in the study to focus on their differentiated capabilities. The challenge is that only some vendors have taken the opportunity to differentiate; some need to be more objectively aware of what they do well, where they have a competitive advantage, and what parts of the ecosystem they need help with to differentiate.

Accenture is the outright leader in one attribute and joint leader in eight others, ensuring leadership in nine of the 17 attributes. It has been ranked as the leader in all previous reports since we began them in 2014. Accenture leverages its scale, overall importance to the Salesforce platform, and subsequent relationship with Salesforce. It can also leverage cross-platform leadership as it has positions of strength on other platforms, such as SAP and AWS, both critical parts of the integrated Salesforce ecosystem.

Deloitte is a joint leader with seven attributes and continues strengthening its position as a leading integrator for Salesforce and related platforms, leveraging its broad consulting expertise and integration capabilities. The firm draws on a globally diversified talent pool, aligning these resources with the larger Deloitte organisation's deep strategic and operational insights. This approach enables Deloitte to deliver end-to-end digital transformation solutions for clients across industries.

PwC is an outright leader in one attribute and a joint leader in five others. It uniquely and comprehensively leverages its extensive industry and substantial transformation experience to deliver value-driven client solutions. By integrating services across its audit and tax functions, PwC provides innovative and comprehensive solutions, creating synergies within its portfolio.

Infosys is a joint leader in three attributes and has strategically utilised acquisitions to establish itself as a leading player in the Salesforce ecosystem. This acquisition-driven growth has significantly expanded its capabilities, allowing Infosys to forge deeper partnerships with Salesforce and secure a strong position in the market's top tier. Its scale and expertise continue to drive competitive advantages and deliver impactful solutions for clients.

IBM is a joint leader in four attributes and will renew its focus as an overall organisation in 2023 and 2024. Consulting will again be central to its core, alongside the cloud and AI. Among the significant consulting providers, it is unique in its ability to offer technology products alongside consulting capabilities, most notably Red Hat.

Wipro has always been a strong global provider of Salesforce solutions. It has strengths in key industries, particularly Financial Services and will be a key provider in the managed services for Salesforce as that accelerates.

Capgemini has increased both the technical capacity for solutions and the increased focus on business outcomes. It has strength in key industries and has used acquisitions to drive growth and capacity in key emerging markets, particularly in Asia.

Slalom is a joint leader in one attribute. It entered the leadership group in 2024. It strongly focuses on cloud-based solutions for clients. Although it has recently substantially increased its geographic scope, it has retained a local flavour to its client delivery approach.

HCLTech is a joint leader in two attributes and entered the leadership group in 2024. It has gradually built up capability in the Salesforce ecosystem, leveraging the growing strength of its applications in the market.

Three vendors are scored as Transform-focused. Dentsu, Publicis Sapiient and Slalom. They all have a business outcome-focused capability with an emphasis on transformation.

Dentsu is a leading agency-based partner. As a result, it is not surprising that the capability is focused on driving digital experience for clients and enabling alignment for marketing and commerce cloud in particular.

Publicis Sapiient is also vital to driving business-related digital outcomes for clients. It focuses on client outcomes and has strong industry alignment in retail, health, and the automotive sector.

Slalom is one of the strongest growing SI's across many technology platforms. It is a key player that will look to build a broader scale to increase capabilities in the market; it uses a more locally based resource model than most SI's, which provides differentiation in the market.

KPMG, McKinsey and TCS were ranked as Transform-focused providers. The addition of McKinsey, in particular, is arguably the most substantial disruption in the market in several years. McKinsey has focused on the manufacturing sector, but its outsized influence in the market is reflected by its leadership in several attributes based on its ability to drive the market. It is challenged by the relative need for scale and resources it can leverage in the market. TCS is the only vendor ranked as a Leverage-focused vendor. Differentiation of the offering of TCS is required to enable it to join the leadership group. It is a capable provider but needs to reinvigorate business outcomes.

The remaining vendors are Market Developers. Whilst they have had varying stages of maturity in Salesforce solutions, all consider it a platform worthy of future investment and focus. The rise in the number and geographic spread of the Market Developers is a crucial point for consideration. All require continual investment in the platform to stand still, let alone advance their influence and capability.

The following charts highlight the rankings and average scores for the Transform and Leverage attributes.

Vendor	Average Transform Score
Accenture	8.2
Deloitte	8.1
PwC	8.0
IBM	7.9
Infosys	7.7
Capgemini	7.7
Slalom	7.6
McKinsey	7.5
TCS	7.4
HCLTech	7.3
Wipro	7.3
KPMG	7.3
Dentsu	7.0
Publicis Sapient	7.0
NTT	6.9
Cognizant	6.9
Globant	6.8
Coforge	6.7
Fujitsu	6.4
Hexaware	6.3
TechMahindra	6.2
Persistent	6.2
LTIMindtree	6.1
Average	7.1

For Transform capabilities, 12 of 23 vendors were ranked above average, with the remainder below average. From a transformation viewpoint, the three highest-rated providers are Accenture, Deloitte, and PwC—this has not changed from the previous report. Again, they are the only three to be ranked with an average transform score over 8. Other leaders in the transform category include IBM, Infosys, Capgemini, Slalom, McKinsey, TCS, HCLTech, Wipro, and KPMG.

The rest have ground to make up for the Transform capability. If vendors can convince prospects that they have differentiated capabilities in Salesforce, transforming client outcomes and success has to be the priority. Several vendors lag substantially in this measure and require a build-out of IP, industry, and focused investments alongside overall ecosystem growth.

Vendor	Average Leverage Score
Infosys	8.4
Accenture	8.4
PwC	8.2
Deloitte	8.1
Slalom	8.0
IBM	7.9
Wipro	7.9
Capgemini	7.8
TCS	7.7
Publicis Sapiient	7.7
HCLTech	7.6
Cognizant	7.5
McKinsey	7.5
NTT	7.4
Fujitsu	7.4
Globant	7.4
KPMG	7.2
Dentsu	7.1
Persistent	7.0
Coforge	6.9
TechMahindra	6.8
Hexaware	6.5
LTIMindtree	6.2
Average	7.5

For the leverage characteristics, 11 of the 23 vendors scored above the average and 12 below. Infosys, Accenture, PwC, Deloitte, and Slalom were all ranked above eight and were the leaders. Other above-average vendors were IBM, Wipro, Capgemini, TCS, Publicis Sapiient and HCLTech. Leverage requires substantial investment across a range of market attributes. It is a capability that requires long-term global investment.

The average rating for each of the attributes is in the following table. The average transform score fell from 7.4 to 7.1. This, on the surface, may indicate a reduction in capability. However, the increase in vendors in the market from a more diverse focus and scale perspective is the critical driver for the reduced overall average rankings. The ability to influence the market remains the lowest-scoring attribute. This is not a surprise; this capability is most prolific among a small handful of consulting-led providers such as Accenture, PwC, and Deloitte, unsurprisingly joined this time by McKinsey.

Further investment is also required in country-based solutions. Each industry and geography measures Salesforce investments' success according to their specific local requirements. Country—and industry-based solutions from the smallest industry and country market are essential.

Research and Development (R&D) remains well invested in the ecosystem, which does not mean complacency can exist. The closer the collaboration between SI and Salesforce, the more effectively Salesforce R&D integrates with internal R&D, leading to greater client success and improved outcomes from Salesforce investments.

Average Transform Attribute Score	Score
Internal R&D	7.7
Leverage salesforce.com R&D	7.6
salesforce.com Ecosystem Partnership	7.6
Global Solution Development	7.7
Industry Solution Development	7.8
Country Solution Development	7.2
salesforce.com Platform Implementation	7.2
Strength of Brand	7.1
Ability to influence external market	6.3
Transform	7.4

Customer Satisfaction is the essential attribute for the measurement of leverage capabilities. The good news in this year's study is that it leads the way. It has the highest score of all 17 attributes in the study, and a decline from the previous research was within the bounds of error. This reflects that whilst additional vendors were included in the study, they were highly capable and of high quality. Publicis Sapient was ranked as the leader, followed by Fujitsu, with Persistent as the third-ranked vendor. This highlights that less dominant vendors, from an overall rating perspective, can have a strong position in the market from particular attributes.

Still, in contrast, while Customer Satisfaction is the most heavily weighted attribute, it alone does not guarantee leadership in the market. It does imply that emerging providers do have the opportunity to provide leadership if they can enhance the overall solution offering that they enjoy. One factor that could also be attributable to their higher scores is that the leaders in these attributes tend to have less complex, business-orientated solutions. These solutions are complicated, leading to challenges in customer satisfaction as the complexity can drive a disconnect. This gives comfort that the emerging providers have the potential to drive leadership capabilities in the market if they can align capacity in Customer Satisfaction with other leverage attributes such as country strength, delivery partnerships, and certified salesforce.com skills.

Leverage Attribute	Average Rating
Customer Satisfaction	7.9
Solution Portfolio Depth	7.5
Certified salesforce.com skills	7.2
Country Strength	7.2
Sales Team strength	7.5
Delivery Partnerships	7.4
In Country Geographic Reach	7.4
Country localisation	7.4
Average	7.5

Accenture leads the way in 8 of the 17 attributes. For one of these attributes, “Certified salesforce.com resources” it stands alone at the top of the rankings. The scale and breadth of Accenture have resulted in this being a consistent result across several editions of this report. Following Accenture, McKinsey, Publicis Sapient, and PwC are the leaders from the perspective of individual attributes. McKinsey is a leader in four, reflecting its core strength in awareness and brand for consulting solutions. Standalone leadership is more difficult than ever before. The increased maturity of offerings and capabilities has resulted in a significant number of shared leadership attributes. The following vendors have shared leadership for at least one of the attributes across Leverage or Transform: Accenture, Deloitte, HCLTech, IBM, Infosys, KPMG, McKinsey, PwC, Slalom, and TCS.

Note - Multiple vendors can share leadership in the market due to the measurement of leadership. Where there is one vendor named, that vendor is the highest ranked vendor, with no other vendor having an equivalent score. Where there are multiple vendors, all were ranked as equal leaders in the market.

Leverage Attribute Top Ranked Vendors (note can be multiple vendors)

Customer Satisfaction	Publicis Sapient
Solution Portfolio Depth	Accenture, Deloitte PwC
Certified Salesforce.com skills	Accenture
Country Strength	Accenture, IBM, McKinsey
Client Team Capability	McKinsey
Delivery Partnerships	PwC
In Market Capability	Accenture, Deloitte
Process Automation	HCLTech, IBM

Transform Attribute Top Ranked Vendors (note can be multiple vendors)

Internal R&D	McKinsey
Leverage Salesforce R&D	Deloitte, Infosys, PwC
Salesforce Ecosystem	
Partnership	Accenture, Deloitte, IBM, Infosys, PwC
Global Solution Development	Accenture, Deloitte, PwC
Industry Solution Development	Accenture
Country Solution Development	Accenture, Capgemini, Infosys, PwC
Salesforce Delivery Platform	Accenture, Deloitte, IBM, PwC
Strength of Brand	McKinsey
Ability to influence external market	Accenture, McKinsey

WHAT ATTRIBUTES DO LEADERS IN THE GLOBAL SALESFORCE SYSTEMS INTEGRATION AND SERVICES PROVIDERS SHARE?

Global Salesforce Systems Integration and Services Providers marketplace leaders share core attributes.

- Long-term investment in the Salesforce ecosystem, including ISVs.
- Growth with Salesforce. As it expands into new capabilities, leading partners are the first to move with them.
- The global commitment of capital and resources to the Salesforce ecosystem
- Integration and cross-investment in a broader SAAS ecosystem and, increasingly, the public cloud platforms of Google, Azure, and AWS.
- Investment in a global capability to support Salesforce expansion
- Engagement in Trailhead to drive certification, culture and skills.
- Focus on IP and asset-based solutions, not just throwing human resources at the problem.
- Development of outcomes to drive business success that is measured
- Above all others, enabling Salesforce clients to move to measurable business and customer experiences

CHARACTERISTICS OF THE MARKET MAKER RANKED PROVIDERS

Accenture

Top three Salesforce solutions capabilities

- Solution Portfolio Depth
- Certified Salesforce resources
- Global Solution Development

Capgemini

Top Three Capgemini Capabilities

- Solution Portfolio Depth
- Client Team Capability
- Industry Solution Development

Deloitte

Top Three Deloitte Capabilities

- Delivery Partnerships
- Global Solution Development
- Solution Portfolio Depth

HCLTech

Top Three Deloitte Capabilities

- Process Automation
- Country Solution Development
- Client Team Capability

IBM

Top Three IBM Capabilities

- Solution Portfolio Depth
- Process Automation
- Country Strength

Infosys

Top Three Infosys Capabilities

- Customer Satisfaction
- Certified Salesforce resources
- Country Solution Development

PwC

Top Three PwC Capabilities

- Solution Portfolio Depth
- Delivery Partnerships
- Global Solution Development

Slalom

Top Three PwC Capabilities

- Customer Satisfaction
- In Market Capability
- Salesforce.com Platform Integration

Wipro

Top Three Wipro Capabilities

- Certified Salesforce resources
- Solution Portfolio Depth
- Global Solution Development

APPENDIX 1 - METHODOLOGY FOR THE CAPTURE SHARE ANALYSIS

Capture Share reports are based on analysing 17 key capabilities and attributes of service providers. These attributes are focused on two key areas: Transform and Leverage.

To undertake the appropriate level of analysis and data integrity, the individual attributes are weighted in percentage terms based on the overall influence of the Transform and Leverage capabilities.

Data and process integrity are critical components of a report of this type. Fundamentally, the data will be valid and untarnished. To help ensure this, all information for measuring and assessing these attributes comes from various sources. These sources include Salesforce, Salesforce users, vendor briefings and meetings, media sources, the IT solutions ecosystem, and specific end-user feedback.

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ABOUT CAPIOIT

capioIT was founded in 2010. It is focused on helping organisations capture and understand emerging digital technology in emerging global economic markets. CEO Phil Hassey has over 20 years of experience in corporate strategy, consulting and market intelligence, gained in a diverse range of organisations and industries.

The core of capioIT -

Capture – Focus on capturing the current and future pulse of emerging markets and emerging technology.

Understand – Source information ensures all customers and stakeholders can understand and drive strategy to maximise customer engagement.

Collaborate – Through strategic partnerships, we have ensured that a small regionally based firm has highly elevated market engagement and influence across technology and geography.

Innovate – We are not satisfied with the current evolution of the analyst/research market. We have listened, engaged, and driven innovation through our engagement model, business culture, use of social media and relationships.



Capture Understand Collaborate Innovate

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