

IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2024–2025 Vendor Assessment

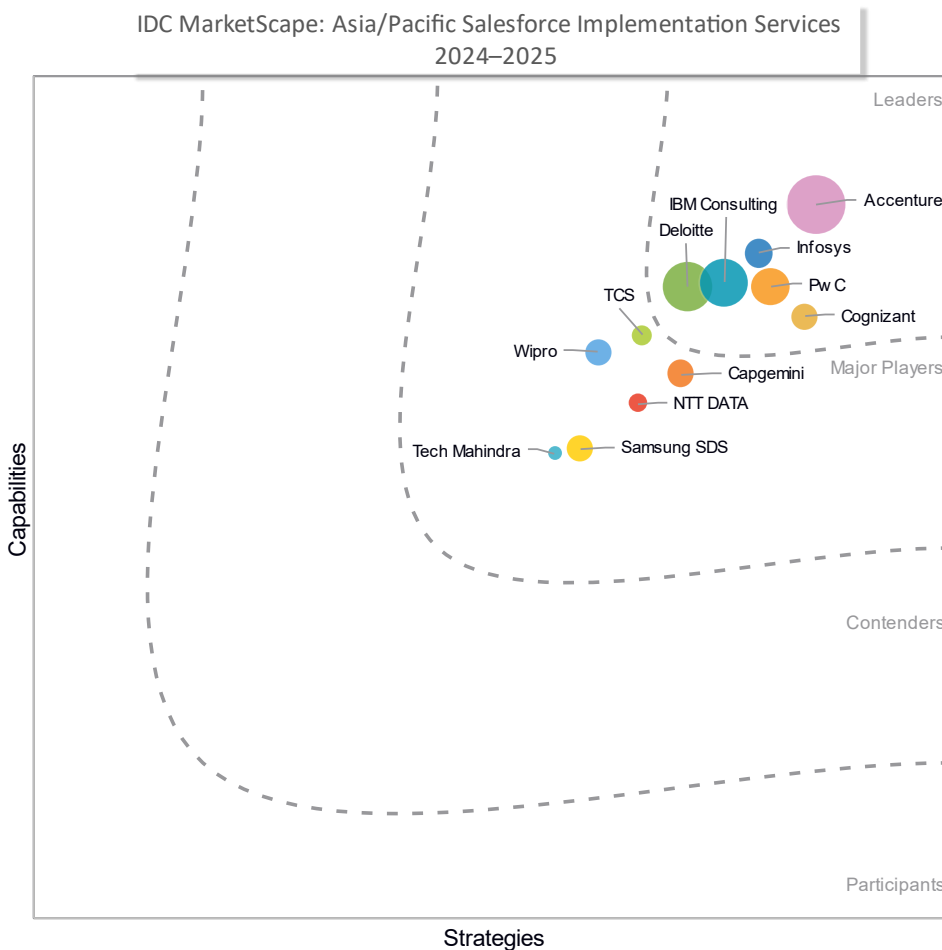
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THIS IDC MARKETSCAPE EXCERPT FEATURES PWC AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2024–2025 Vendor Assessment



Source: IDC, 2024

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2024–2025 Vendor Assessment (Doc # AP51540024). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

According to *IDC's 2024 Asia/Pacific Services Survey*, the primary challenge hindering enterprises from delivering differentiated and superior customer experiences (CX) is their outdated IT infrastructure and applications, significantly limiting their agility and responsiveness to changing customer expectations. Over the years, Salesforce has positioned itself as an experience transformation enabler capable of converging data and AI to transform every aspect of the CX, ensuring there is business value generation throughout the customer journey. According to Salesforce, Asia/Pacific witnessed tremendous growth in its adoption and is now a key strategic region, making up approximately 10% of Salesforce's overall global revenue for the FY24 period.

As Salesforce integrates new AI capabilities into its product portfolio, aligns its go-to-market (GTM) with industry solutions, and takes a data-led approach to reinvent front-office operations, the implementation of Salesforce solutions has become increasingly complex. Enterprise buyers bank on the expertise of their implementation service partners to enhance (and in some cases, realize) the value of their Salesforce investments by tailoring solutions to their business, integrating with internal business systems, attaching localized support services, and extending innovations on the Salesforce platform to fit long-term business needs. Consequently, the services ecosystem around Salesforce implementation is expected to grow as fast, if not faster, than Salesforce in Asia/Pacific.

This IDC study assessed Salesforce implementation vendors in Asia/Pacific based on both the strength of their current service capabilities and how well placed they are to grow Salesforce adoption with their sound growth strategy. The key findings of this assessment include:

- **Maturing Salesforce practices.** Salesforce service partners continue to scale their growth in the Asia/Pacific region, with focused investment in local talent, IP offerings, and consulting capabilities. Compared with the last iteration of the study, all partners have strengthened their focus on regional growth strategy and delivery capabilities in Asia/Pacific for Salesforce engagements.

- **AI-infused applications and metamorphosis.** According to the IDC study, *The Value of an Experience-Orchestrated Business*, to compete in an AI everywhere world, digital businesses must orchestrate a meaningful value exchange between the organization and their key stakeholders, transitioning into what IDC calls an experience-orchestrated (X-O) business (X-O). IDC believes that AI-infused applications will be central to this next era of technological advancement and the foundation for achieving the X-O business model. As Salesforce doubles down on its agent-centric solutions that require less human intervention to complete tasks and integrate AI into its portfolio of solutions, it is banking on the partner ecosystem to scale customer adoption and build complementing solutions that enhance embedded AI capabilities. Vendors varied in their capability and approach to augment Salesforce AI offerings, especially communicating how customers can achieve value from new features. Additionally, some vendors have made considerable progress in integrating AI capabilities into the implementation life cycle, guaranteeing efficiency gains and subsequently passing on the benefits to customers.
- **Data is a key piece of the puzzle.** Salesforce Data Cloud and Einstein platform are at the core of Salesforce's efforts to unify customer data and anchor its AI strategy. Vendors evaluated in the study have moved beyond standalone data cloud implementations to building cohesive solutions that optimize customer data readiness and a platform-centric approach to automation.
- **Complementing implementation with value-added services.** With a growing call to tighten compliance of cloud applications, some vendors have complemented implementations with risk advisory and services to enhance compliance post-implementation of Salesforce solutions. As organizations shift from capex to opex investment models with software-as-service (SaaS) solutions, gaining visibility and optimizing existing Salesforce investments are instrumental in controlling cost. Some vendors excelled in bundling implementations with optimization services to enhance value from new and current Salesforce investments.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This evaluation does not offer an exhaustive list of all the players in the Asia/Pacific Salesforce implementation services partner ecosystem. IDC narrowed down the field of players based on the following criteria and subsequently collected and analyzed data on these 12 implementation services partners for this IDC MarketScape:

- **Revenue:** Each service provider was required to have 2024 total revenue (from Salesforce implementation services) that exceeded US\$30 million from the Asia/Pacific region.

- **Geographic presence:** Each vendor was required to have service delivery capability in at least three subregions, with a revenue of 10% from each geography.
 - Australia/New Zealand (ANZ)
 - The Greater China region (GRC) (China, Hong Kong, and Taiwan)
 - South Korea
 - Southeast Asia (SEA) (Singapore, Malaysia, Indonesia, Thailand, Vietnam, and Philippines)
 - India
 - Japan
- **Service capabilities:** The vendor should have demonstrated end-to-end service capabilities around Salesforce implementation; this includes design, consulting, customizations, and systems integration (SI).

Products and services covered: The service provider should provide implementation services around core Salesforce solutions as follows:

- Sales
- Service
- Marketing

IDC will also evaluate the vendor's service capabilities around Salesforce solutions as follows:

- CPQ and billing (Revenue life-cycle management cloud)
- Digital experience platform (DXP) solutions
- Commerce
- Data and analytics (Data cloud, Tableau)
- Platform and integration (Salesforce platform, MuleSoft, Lightning apps)
- Collaboration (Slack)
- Sustainability (Net Zero Cloud)
- Industry cloud (Any 3)

ADVICE FOR TECHNOLOGY BUYERS

Based on this study, IDC recommends that buyers consider the following recommendations before starting new Salesforce implementations or while embarking on a CX transformation journey:

- **Prepare an AI strategy leading with trust and data.** For many organizations, customer engagement can be a top use case for AI integration before moving on to more complex use cases. To capitalize on the opportunities from AI, organizations must focus on data and IT architecture

readiness. Evaluate the vendor's capabilities to build data architecture and responsible ethical frameworks to support AI use cases. Additionally, look past the vendor's marketing claims to understand its approach to unearthing business value from AI especially its approach to solving customer data challenges with Salesforce or proprietary offerings or both while upholding a high level of ethics and governance.

- **Think beyond CRM implementation.** Salesforce has transformed its value proposition beyond the realms of a CX transformation tool to an engagement platform, transforming employee experience and customer journeys. Leverage the expertise of Salesforce partners that can bring together tools, best practices, methodologies, and SI experience to elevate the value proposition of Salesforce solutions beyond the CX use cases. Partner with implementation SPs that can drive unity between the front and back office enabling stronger integration with business systems and create an integrated data strategy, with analytics, AI, and automation.
- **Give adequate attention to change management.** To maximize the value from Salesforce investments, enterprises need to provide ample weightage to people and process changes along with the technology integration changes required for transformation. Invest in a holistic change management strategy that captures the requirements of the sales and marketing team, tracks outcomes from the implemented solution, and creates a feedback loop to foster continuous innovation.
- **Consider industry expertise.** As Salesforce continues to align its portfolio of solutions to address key industry pain points, it is important to consider the industry expertise of the implementation partner to contextualize solutions and provide key industry insights at various stages of implementation that can provide superior time to value and upfront cost savings.
- **Look for strong local support capabilities.** Many customers interviewed by IDC indicated the need for high-touch support from Salesforce and its partners, especially where there are multiple integrations with external and internal applications. Hence, evaluate the partner's local support capabilities and synergy with the Salesforce team in the country to ensure proactive support during implementation.
- **Evaluate vendors.** Use this IDC MarketScape in contract negotiations and as a tool to not only shortlist vendors for Salesforce implementation services bids but also evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise (technical, industry based, or otherwise).

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria

outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

PwC

According to IDC analysis and buyer perception, PricewaterhouseCoopers (PwC) is positioned as a Leader in the IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2024–2025 Vendor Assessment.

PwC is a global professional service firm that provides business and technology transformation services across Asia/Pacific. Currently, PwC provides end-to-end implementation services (design, advisory, consulting, SI, migration, maintenance, and so forth) across the entire portfolio of Salesforce products and platforms.

PwC's expertise in enabling technology-led business model reinventions for clients is at the heart of its Salesforce services GTM. To facilitate this, PwC leverages its business model reinvention (BMR) framework, which brings together deep sector and IT architecture-building expertise to create new business value for clients from their Salesforce investments. Reimagining customer experience and customer relationship management (CRM) platforms is a top priority for PwC, and as a result, PwC has developed sector-specific solutions on the Salesforce platform to address key priorities in the financial services, public sector, education, retail and distribution, energy and utilities sectors. Additionally, PwC emphasized its commitment to foster security and compliance in its Salesforce engagements by embedding its assurance, strategy, and transformation practices to foster trust and deliver compliant outcomes for clients leveraging Salesforce solutions.

At the time of this study, PwC has a higher distribution of Salesforce skilled resources in India, followed by the ANZ and SEA regions. At the time of this study, the significant verticals in PwC's Salesforce practice in Asia/Pacific were health and public service, insurance, communications and media.

Strengths

- **Reinvent sales, service, and marketing functions.** PwC's BMR framework is designed to help improve the speed and success rate of targeted functional transformation programs. Clients embarking on large Salesforce-led transformation of core CX functions will find this approach particularly helpful in challenging the status quo and evolving CX functions with the market dynamics.
- **Value-added services to enhance Salesforce implementations.** PwC emphasized its efforts to embed trust at the core of its transformation approach. As a result, PwC has integrated add-on services around security, privacy, and compliance in its Salesforce implementation projects.
- **Local support capabilities.** PwC focuses on supporting clients where they operate and has strengthened its talent base in each market unit in

Asia/Pacific. Clients can ensure access to local consultants in the geographies they operate in.

Challenges

- PwC may not be appropriate for clients with a limited transformation scope in their Salesforce implementations.

Consider PwC When

PwC's design-led implementation approach enabled by its BMR framework and strong Salesforce advisory expertise fit well with large and local enterprises in Asia/Pacific looking to reimagine their front-office operations.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is with customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and GTM plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information and end-user

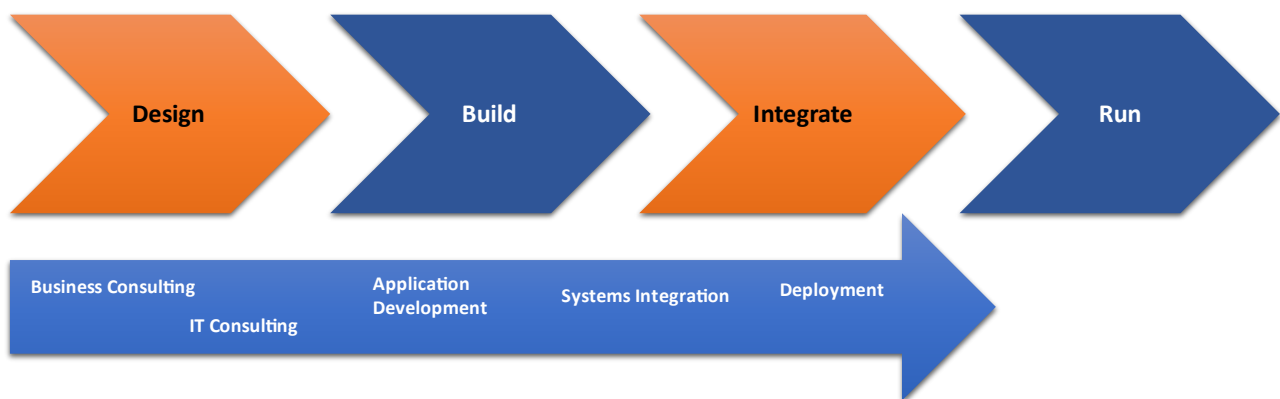
experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

The Salesforce implementation services market covers the design, build, and integrate functions of the design–build–run function chain (see Figure 2). The design phase includes both IT and business consulting. For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2019* (IDC #US47769222, March 2019).

FIGURE 2

IDC's Design–Build–Run Function Chain



Source: IDC, 2024

LEARN MORE

Related Research

- *Asia/Pacific State of Cloud: Adoption Trends, Challenges, and Preferences* (IDC #AP51592524, September 2024)
- *Why Did Customer Experience Emerge as the Top Metric for Work Transformation Investments Success in Asia/Pacific?* (IDC #AP51159724, June 2024)
- *How Is Generative AI Disrupting Customer Experience Functions Among Asia/Pacific Businesses?* (IDC #AP51159924, June 2024)
- *Enterprise Expectations in Asia/Pacific from IT SPs for Generative AI* (IDC #AP51593224, June 2024)
- *C2G: Asia/Pacific (Excluding Japan) Systems Integration Services Market Share, 2023: IDC's Top 10 Vendors* (IDC #AP50957824, May 2024)
- *Asia/Pacific Cloud Adoption Trends and Preferences Around Cloud Professional Services* (IDC #AP50957224, March 2024)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of service providers participating in the Salesforce implementation services market with specific offerings and capabilities in the segment. It discusses both the quantitative and qualitative characteristics that lead to success in the ecosystem.

The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to one another and the criteria and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"The services ecosystem around Salesforce implementation is expected to grow as fast, if not faster, than Salesforce itself in Asia/Pacific. A key reason for this growth is the increasing complexity buyers face in implementing Salesforce and deriving value from the existing portfolio of Salesforce solutions. Vendors that can contextualize solutions for industries, solve customer data challenges, and complement Salesforce AI solutions to transform experiences will create long-term value for clients," says Rijo George Thomas, senior research manager of IT services research, IDC Asia/Pacific.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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