

Salesforce Ecosystem Partners

Comparative analysis of the most relevant
service providers and Salesforce partners

Customized report courtesy of:



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An increasingly dynamic and global competitive scenario

Salesforce continues to be one of the most significant forces in many companies' success strategies. This year's ISG Provider Lens™ study shows the Brazilian market's strong interest in Salesforce cloud solutions, causing an increase in the number of global service companies. These follow the evolution and future prospects of local demand to acquire regional companies and leverage their delivery capacity, knowledge and resources.

Many lacked operations in the country, or if they did, their operations lacked vigor. Global technology companies are recording a constant drop in their revenues mainly because the effects of the pandemic are subsiding (a period that saw a tremendous increase in sales of technology products, platforms and services). Salesforce's announcement to reduce 10 percent of the team and the closure of some offices worldwide are other factors. Despite such headwinds, Brazilian

companies are showing immense interest and plan to increase their investments in Salesforce solutions in the coming years.

This fact indicates that there are plenty of opportunities in the underexplored areas of many businesses. The best-performing organizations are maximizing the use of Salesforce offerings and becoming agile to meet market demands. They are leveraging the platform's power and implementing the solutions across their enterprises.

The Salesforce partner ecosystem in Brazil has been growing in quantity and quality. Many 'new' brands appear in this study that show ample competitive strength in their portfolio of services. However, there is still plenty of room to grow.

Salesforce is a young ecosystem (10 years) that started operating in the country in 2013. It generates much of its revenue from Brazil's South and Southeast regions. ISG has identified new service companies outside these regions, which shows the vendor's strategy in identifying, preparing and developing new partners far from the known metropolises.

Constantly evolving, **mature** **Salesforce** ecosystem



Executive Summary

Salesforce partners in Brazil generate approximately 50 percent of the revenue, which can be higher when compared to other platforms such as Microsoft. For example, Microsoft's sales by partners represent close to 95 percent. However, it is important to consider that Microsoft has been in the country for almost 30 years, presenting a mature partner management model.

The pandemic forced all organizations to work remotely. Today, companies are working in hybrid environments. Either way, organizations are enabling data, analytics, processes and decisions through digital environments across marketing and sales to operations and services. The Salesforce platform solution offers *cross-cloud* capabilities that allow connection in all environments, virtual or face-to-face. These environments can deliver excellent productivity performance when combined with technologies such as AI, NLP and *workflow* through Slack. Salesforce has launched several initiatives to identify, qualify and promote the top-performing partners in various categories. The ISG Provider Lens™ Salesforce Ecosystem Partners Brazil 2023 study feature many companies

and highlight their positioning, number of certifications, evolution, level of expertise and competencies in multiple programs. Some of these programs that partners mentioned the most in the study are the following:

Salesforce Navigator Program: It is a customer-validated rating system implemented in 2019 that measures the implementation experience of consulting partners that show expertise in niche products, industries or services rather than measuring size, reputation or partnership levels.

Salesforce-Certified Partner Expert: The AppExchange portal (appexchange.salesforce.com/consultants) has a record of several consulting firms and digital agencies. It features more than 170,000 experts worldwide that specialize in strategic guidance and have technical skills and knowledge in various industries, products and regions of operation.

Salesforce Partner Advisory Boards: These are formal forums for expressing ideas and opportunities that can accelerate partners' business growth. These forums are intended to form strategies for performance, planning and execution of various Salesforce products and

solutions and are organized by product and focus areas.

Global Services Agreement (GSA): A contract between Salesforce and some partners to deliver specific services.

There is a growing number of cases where multiple partners deliver different services and implement different cloud or Salesforce solutions within the same company. This scenario is typical in large organizations with autonomy, diverse needs and distinct budgets across departments.

It identifies opportunities for specialist partners and simultaneously generates greater complexity in contract management for customers. This may create a need for consolidation of these partners in the future, giving preference to those understanding the customer's business and having expertise in multiple Salesforce products.

Even so, finding skilled talent in several technologies, such as Salesforce, is a common challenge among most companies in the Brazilian market. It is difficult to find, recruit and hire new professionals.

An action taken by most partners analyzed in this study is the creation of academies, an initiative by many Brazilian and global companies of different sizes to help generate new qualified professionals in the Brazilian market. This global phenomenon has inflated salaries in several categories and levels of activity.

In contrast, companies that are better skilled in talent management are creating other ways to attract and retain their best people. Today, highly talented employees are choosing the companies they will work for based on certain values such as the culture they possess and not financial ones. In addition, they stay because of career plans, support, mentoring and possibilities for growth into leadership positions.

As mentioned before, the Brazilian market is still expanding, presenting opportunities for companies that consider Salesforce's offerings as the best options for them to achieve their business goals, ensure digital transformation and innovation implementation.



Executive Summary

While we are in this boom period, many opportunities will arise, allowing competitors to coexist on the same customer. With the beginning of market saturation, differentials will be demanded by clients, and the Salesforce partners with strong experience, deep knowledge, and best competencies in multiple areas and market sectors, will stand out and overpower other, smaller competitors.

Constant growth and development
of service partners





Provider Positioning

Page 1 of 3

	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Accenture	Leader	Leader	Leader	Leader	Leader	Leader
Atile.Digital	Product Challenger	Product Challenger	Contender	Not In	Product Challenger	Not In
BeeCloud	Product Challenger	Product Challenger	Product Challenger	Not In	Contender	Not In
BRQ	Leader	Leader	Product Challenger	Rising Star ★	Leader	Product Challenger
Builders	Contender	Contender	Contender	Not In	Not In	Not In
Cadastra	Not In	Not In	Product Challenger	Not In	Not In	Not In
Capgemini	Leader	Leader	Leader	Leader	Leader	Leader
Deloitte Digital	Leader	Leader	Leader	Leader	Not In	Leader
Enext	Not In	Not In	Market Challenger	Not In	Not In	Not In
Everymind	Leader	Leader	Leader	Leader	Leader	Leader





Provider Positioning

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	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
Gentrop	Not In	Not In	Leader	Not In	Contender	Not In
GFT	Rising Star ★	Rising Star ★	Product Challenger	Not In	Product Challenger	Rising Star ★
Globant	Leader	Leader	Leader	Product Challenger	Product Challenger	Not In
IBM	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Product Challenger
Infosys	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
iSmartBlue	Contender	Market Challenger	Contender	Contender	Not In	Contender
JFOX	Leader	Leader	Rising Star ★	Product Challenger	Leader	Not In
Keyrus	Contender	Contender	Not In	Contender	Not In	Not In
match.mt	Not In	Not In	Leader	Not In	Not In	Not In
Math	Not In	Contender	Market Challenger	Not In	Not In	Not In



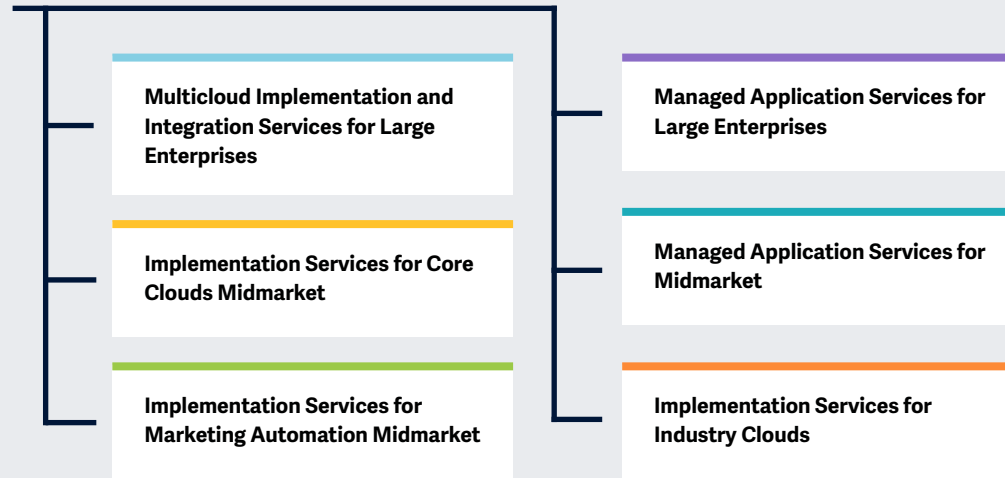


	Multicloud Implementation and Integration Services for Large Enterprises	Implementation Services for Core Clouds Midmarket	Implementation Services for Marketing Automation Midmarket	Managed Application Services for Large Enterprises	Managed Application Services for Midmarket	Implementation Services for Industry Clouds
OSF Digital	Leader	Leader	Leader	Leader	Leader	Leader
PwC	Leader	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
SR Consulting	Contender	Contender	Not In	Not In	Contender	Not In
SysMap	Rising Star ★	Product Challenger	Contender	Product Challenger	Rising Star ★	Contender
TCS	Product Challenger	Not In	Not In	Not In	Not In	Not In
Tech Mahindra	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
T-Systems	Product Challenger	Not In	Not In	Not In	Not In	Product Challenger
Valtech	Leader	Leader	Leader	Leader	Leader	Leader
XCL	Product Challenger	Not In	Not In	Not In	Not In	Market Challenger



More partners
with **more skills**
and **better quality**
delivery.

Simplified Illustration Source: ISG 2023



Definition

The Salesforce Ecosystem study examines various offerings of the platform, which in turn have been categorized into cloud deployment services (Change the Business) and managed services focused on operational support of productive applications (Run the Business). These segments were created for large enterprise and mid-market customers, due to the significant need for Salesforce integration into the complex application landscape for large enterprise customers. In addition, these customers primarily have businesses that operate globally and require corresponding capabilities and delivery levels through Salesforce service providers and partners.



Scope of the Report

The ISG Provider Lens™ study includes six quadrants with the following themes: Multicloud Implementation & 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:

- Transparency about the strengths and weaknesses of relevant suppliers;
- A differentiated positioning of suppliers by segments;
- Focus on the local market.

Provider Classifications

The provider position reflects the evaluation within defined market segments (quadrants) and always applies to all business sectors and company sizes. In case the service requirements are different and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation by performance is made according to the target group for products and services. ISG considers the requirements of the business sector or the number of employees, as well as the corporate structures of the customers, and positions the providers according to their area of interest. As a result, ISG differentiates them, if necessary, into two groups defined as follows:

- **Middle Market:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million, headquartered in the respective country, usually privately held
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenues above \$1 billion, with worldwide activities and globally distributed decision-making structures

ISG Provider Lens™ quadrants are created using an evaluation matrix containing four groups (Leader, Product Challenger, Market Challenger and Contender) and suppliers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) that ISG believes has strong potential to move into the Leader quadrant. Such a supplier is classified as a Rising Star.

Number of suppliers in each quadrant: ISG ranks and positions the most relevant service suppliers according to the scope of the report for each quadrant and limits the maximum of 25 (exceptions are possible) suppliers per quadrant.





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.

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.

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.

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 report is relevant to large enterprises across industries in Brazil that are evaluating implementation service providers for Salesforce applications and their integration with other major standard software solutions.

In this quadrant, ISG highlights the current market positioning of Salesforce implementation and integration service providers for large enterprises, and key business challenges addressed locally.

Large organizations have complex and challenging IT environments; therefore, they seek partners of excellence with immense knowledge, experience and the ability to instill confidence in their service delivery. In this scenario, many service providers in Brazil lack the competence to manage the entire Salesforce portfolio, or the manpower required to meet the needs of various large companies. Consequently, there has been an increase in organizations that rely on multiple implementation and integration partners, each with their own Salesforce specialization, to meet their demand for Salesforce offerings.

In Brazil, the Salesforce ecosystem increasingly relies on global partners that enter the domestic market by acquiring local companies; absorbing resources and technical knowledge; building their customer portfolio; and boosting brand visibility in the country.



Marketing and sales leaders should read this report to understand service partners' relative positioning and capabilities that can help the leaders effectively implement Marketing Cloud, Sales Cloud, Tableau CRM and Heroku, among other offerings, with necessary integrations of complementary systems, such as analytics solutions.



Security and data professionals should read this report to understand how vendors comply with the General Data Protection Law (LGPD) in Brazil and security requirements in their Salesforce implementation and integration practices, and how vendors can be compared to each other.



IT and technology leaders should read this report to understand service partners' relative positioning and capabilities that can help companies adopt Salesforce cloud services and perform integrations with other enterprise solutions.

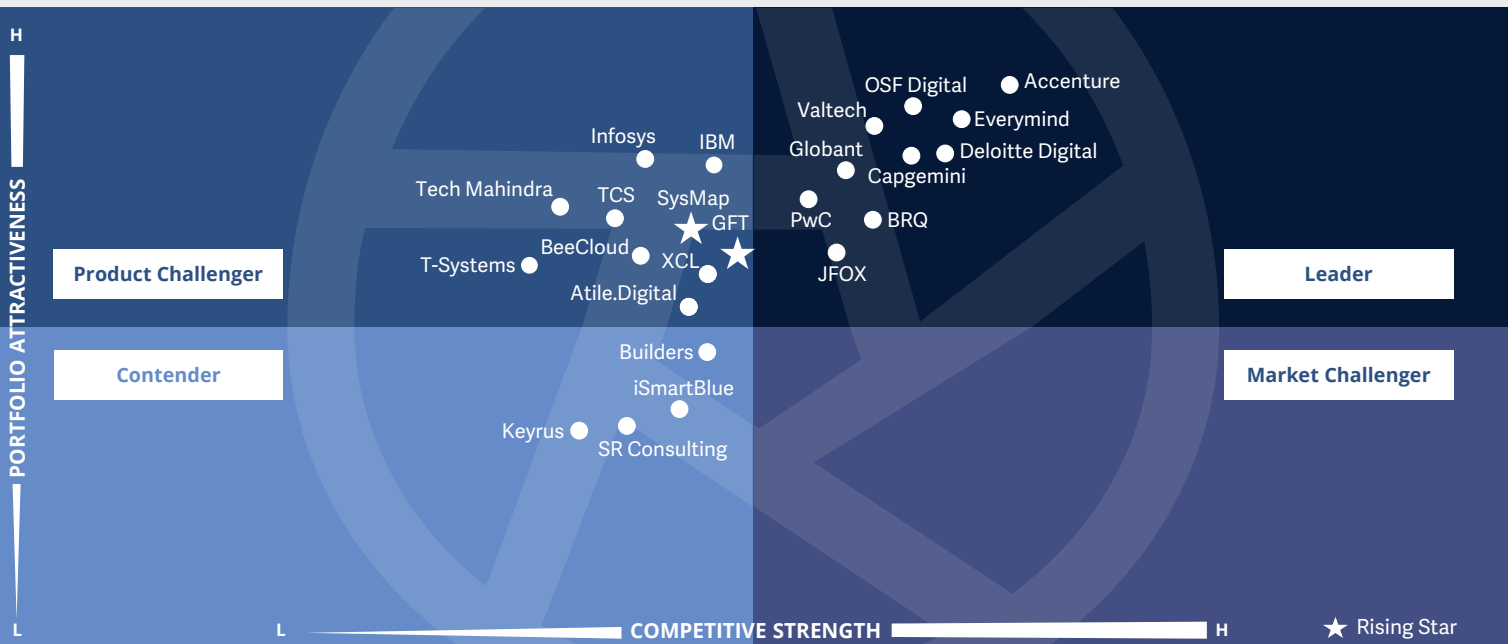


Field service managers should read this report to understand how service providers implement and expand their use of Salesforce Service Cloud to improve their operations management.



Salesforce Ecosystem Partners Multicloud Implementation and Integration Services for Large Enterprises

Brazil 2023



This quadrant evaluates service providers that **implement Salesforce multiclouds** and **integrate** them into **the most complex solutions in the market for large enterprises**.

Mauricio Ohtani



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 clean-up, migration and finally, go-live support.

Eligibility Criteria

1. Strong implementation capabilities (**consulting, configuration, data migration, and go-live**) across all Salesforce products
2. **Deep knowledge of** major standard software packages beyond Salesforce, as well as the ability to **implement end-to-end processes**
3. Extensive **skills in architecture** and realization of complex application scenarios
4. Availability of **pre-defined solutions and accelerators**, preferably functionality-oriented and industry specific
5. **Scalable delivery capabilities** to serve large corporate customers
6. Attractive list of **use cases and references**



Multicloud Implementation and Integration Services for Large Enterprises

Observations

The Brazilian market has witnessed many mergers and acquisitions in the recent years. It was no different with the Salesforce partner ecosystem, due to several factors. Having identified the market potential and scope for continuous growth, many global companies decided to acquire local and smaller companies with good representation, either through experience in successful projects or through the customer portfolio and quantity/specialty of available resources. Besides acquiring the client portfolio, they have increased their internal resources with professionals ready and prepared to be involved in the delivery of the projects.

Many Salesforce partners have increased their resources and intensified their efforts to expand and improve their delivery capabilities. While some have invested in expanding the portfolio of offerings, others have decided to improve the internal capabilities of their existing offer, hire better-qualified professionals, and increase the quality of the services offered.

The market competitiveness in the Salesforce multicloud implementation and integration services quadrant is expected to intensify in the coming years. The Leaders in this quadrant, for the most part, are global companies that contribute resources quickly and decide to invest in improving processes quickly. This capability is not seen in the local partners whose financial decisions, for example, are more judicious and to a lesser extent.

Of the 64 companies evaluated for this study, 25 qualified for this quadrant with 10 being Leaders and 2 as Rising Stars.

accenture

Accenture is a major highlight in the Salesforce partner ecosystem in Brazil. Its operation has shown vigorous growth in competence and quality of delivery.



BRQ acquired TOPi in mid-2021, one of the oldest Salesforce partners in Brazil. It has been operating in the country for 29 years with offerings in technology services, comprising a portfolio of over 150 clients.

Capgemini

Capgemini is a global company headquartered in Paris, France. With operations in 50 countries, it has more than 358,400 employees. It has more than 15 years of relationship with Salesforce and is one of the company's Global Strategic Partners.

Deloitte Digital

Deloitte Digital was formed in 2021 as a spin-off of one of the largest business services organizations in the world, Deloitte, with operations in 150 countries. The acquisition of CbCloud, also in 2021, boosted its Salesforce operations in the Brazilian market.

Everymind

Everymind is a Brazilian technology services company and Salesforce partner. It strengthened its presence in the region by the acquisition of Compass UOL and expanded its services to large corporations.

Globant

Globant is a multinational technology company, established in Argentina in 2003. Present in 21 countries, it has more than 26,000 employees specialized in digital transformation in several areas of the economy.



Multicloud Implementation and Integration Services for Large Enterprises

JFOX

JFOX was founded in Brazil in 2014. It formalized the partnership with Salesforce in 2015 and has been growing in the local market since then. Currently, besides being an implementer and integrator of solutions, it is accredited as a reseller of platform licenses.

OSF Digital

OSF Digital is a global technology services company, a Salesforce partner since 2009. It has been operating in Brazil since 2013, and in June 2022, it acquired Kolekto, a local company specialized in the automotive segment.

PwC

PwC is based in London and is one of the largest global consulting firms. It has been growing its operations in the Brazilian market, offering services in strategy, management, consulting practices, technology and others, including Salesforce.

valtech_

Valtech is a digital marketing and technology services agency with operations in over 20 countries. In February 2022, the company acquired Wings IT, a Brazil-based Salesforce partner with a strong capability in the Marketing Cloud.

GFT

GFT was defined as a Rising Star due to its rapid growth in Salesforce implementation and integration projects in relevant companies in the Brazilian market.

SysMap

SysMap is a Brazilian company that operates in the technology market. Founded in 1999, the company has operations in three locations in Brazil and one in Dallas, U.S. It qualified as a Rising Star due to its positioning and competence in Salesforce clouds.



BRQ



"BRQ has extensive experience and deep knowledge in Salesforce in Brazil."

Mauricio Ohtani

Overview

BRQ Digital Solutions is a Brazilian services company that has been enabling digital transformation for its customers for 29 years. Its delivery capacity focuses on people, processes and technologies, generating the best experience and convenience for the final consumer. In addition, it has more than 150 companies in its client portfolio, distributed in eight countries. Finally, the acquisition of TOP Information, which occurred in November 2021, positions the company as one of the main Brazilian partners in the Salesforce ecosystem.

Strengths

Comprehensive service offering: BRQ offers a complete range of services needed for companies interested in implementing Salesforce clouds. With qualified professionals, the company offers services for strategic definition, configuration and validation of architecture, or even environment migration or *go-live* support.

Long experience and deep expertise:

BRQ's more than 30 years of experience in technology services and TOP's 14 years of experience in Salesforce provide enterprises with deep knowledge and broad skills to achieve maximum benefits in supporting and using Salesforce's multicloud.

Large number of partners favoring platform integration:

BRQ has a wide list of strategic partners that support its customers in the Salesforce integration processes. Organizations integrate solutions offered by Salesforce partners such as Microsoft, SAP, Oracle, Google and AWS are the main corporate solutions that organizations need to achieve a high productivity and synchronized corporate environment.

Caution

One feature that top-performing organizations look for in the Salesforce platform is process automation. BRQ must invest in the ability to build, apply and manage process automation tools that facilitate and increase user productivity.

BRQ customers should align expectations when the interest is in process automation. They must also assess the level of knowledge and quantity of available resources before hiring the services.





Implementation Services for Core Clouds Midmarket

Implementation Services for Core Clouds Midmarket

Who Should Read This Section

This report is relevant to small and midsize enterprises across sectors in Brazil for assessing the service providers in implementing Salesforce Core Clouds.

In this quadrant, ISG highlights the current market positioning of these providers and how they address the key challenges faced by companies locally.

This quadrant evaluates vendors specializing in Sales Cloud, Service Cloud, Commerce Cloud and Community Cloud offerings. Companies generally use an agile approach to implementation and focus on cases where integration is least necessary, which is typical for midsize and small customers. The companies evaluated also act as consultants, helping customers redesign and enable processes with Salesforce applications.

The CRM industry's M&A market remains active, with large companies acquiring smaller ones to absorb their resources, and other partners consolidating to improve delivery capabilities and outcomes. Thus, vendors' inorganic growth strategies may shift to serve larger accounts

and more complex projects. This transition allows new entrants to move into the Salesforce partner ecosystem that serves small and midsize businesses in Brazil.

From the customer's viewpoint, these changes in the national scenario delay the decision to choose a partner as old names fade and new ones emerge.



Marketing and sales leaders should read this report to understand the relative positioning and competencies of Salesforce service providers that can help them effectively deploy the Sales Cloud and Commerce Cloud products.



IT and technology leaders should read this report to understand providers' relative positioning and capabilities in helping leaders adopt the Sales Cloud, Service Cloud and Commerce Cloud products and further analyze how their technical capabilities and development methodologies can be compared to the rest of the market.



Field service managers should read this report to understand how Salesforce partners are implementing and expanding their use of the Service Cloud to better manage field service operations.

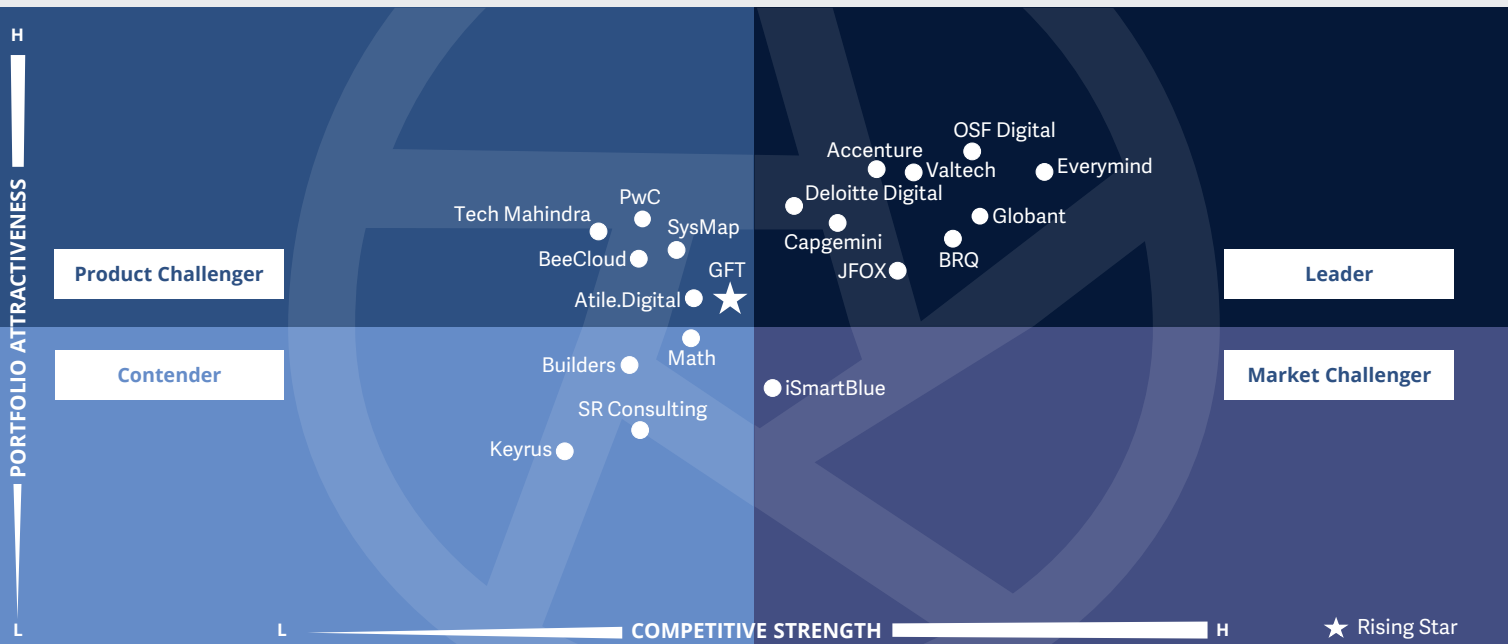


Security and data professionals should read this report to understand how vendors comply with LGPD in Brazil and security requirements in their Salesforce implementation and integration practices, and how vendors can be compared to each other.



Salesforce Ecosystem Partners Implementation Services for Core Clouds Midmarket

Brazil 2023



This quadrant evaluates service providers **specializing in** Salesforce's **Core Clouds** (Sales Cloud, Service Cloud, Commerce Cloud and Community Cloud) with an **agile approach to** implementations.

Mauricio Ohtani



Implementation Services for Core Clouds Midmarket

Definition

This quadrant evaluates vendors that specialize in Salesforce on the Sales Cloud, Service Cloud, Commerce Cloud and Community Cloud. These products are widely considered to be the core Salesforce clouds. These vendors take an agile approach to implementation and focus on cases that need low levels of integration, which is typical for mid- to small-sized customers. Therefore, in many cases, these projects are completed within a few months. An important aspect of the required services revolves around consulting on process redesign while using Salesforce applications. From a functional point of view, 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**) for Salesforce Core Clouds (at least for sales, service and commerce clouds)
2. **Training and enablement of customer's personnel** to use the application
3. Availability of pre-defined **solutions and accelerators**, preferably functionally-oriented and industry-specific
4. Presence of **unique differentials**
5. Economic stability and **significant delivery capabilities** to serve multiple customers
6. Attractive list of **use cases and references**



Implementation Services for Core Clouds Midmarket

Observations

Because of the number of mergers and acquisitions that took place between the last edition of this study and this one, we have noticed a change in the prevalence of companies in the Leaders' quadrant. In the last editions, most of the Leaders were local companies. In this edition, of the nine Leaders, only three are regional companies, two of which were acquired by other companies of Brazilian origin.

The leadership scenario in this quadrant, dominated by global companies, must change, as the focus of these organizations is on the large organizations segment. Eventually, they may develop strategies to operate in this segment, but it is unlikely that most will maintain their focus and efforts in the implementation services of Core Clouds in the midmarket segment, making room for those who show better performance and gain confidence in this segment. With the support of Salesforce, the SMB market has gained prominence. Since the large enterprise market is already considered well served, we should find changes in the positioning of some partners for the next study.

Agility, speed of implementation, use of best practices and knowledge of the business segment are key factors to succeed in this segment. However, many partners still do not have all these competencies and need to consider partnerships with other companies to meet the rising demands. Eventually, this timely partnership may generate a new organization or a merger between the parties, strengthening the positioning and delivery capacity of this new company.

Of the 64 companies evaluated for this study, 21 qualified for this quadrant with nine being Leaders and one as Rising Star.

accenture

Accenture is present in over 120 countries and is one of the largest global companies in professional services. It has strategic clients in the midmarket with implementations of Salesforce Core Clouds.



BRQ expanded its operations with the acquisition of TOPI, which had a large customer base in the midmarket. The experience in implementations, along with the technological knowledge, makes BRQ one of the Leaders.

Capgemini

Capgemini has been growing its operation organically and broadening its scope of services. Its midmarket performance strategy presents quick implementations with pre-defined standards.

Deloitte Digital

Deloitte Digital has experience in Core Cloud implementations in the midmarket. Although its focus is on large enterprises, the provider offers services to some strategic companies with growth potential.

Everymind

Everymind serves both small and medium-sized businesses. Its performance with large companies came over the years. It has several medium-sized clients that have implemented Core Clouds in their portfolio.

Globant

Globant acquired a large portfolio of mid-sized customers with the acquisition of Nèscara. Specialized in the agribusiness segment, Nèscara has implemented several Core Clouds projects in this segment.



Implementation Services for Core Clouds Midmarket

JFOX

JFOX has been growing rapidly in the market. It has developed a great delivery capacity for large and medium-size clients. It has strong local capabilities with professionals that understand the business objectives of local clients.

OSF

OSF Digital has been growing through acquisition, with Kolekto bringing considerable experience and knowledge in working with the midmarket. With the ability to implement all Salesforce clouds, OSF Digital shows high delivery capability.

valtech

Valtech gained a large portfolio of large and mid-sized companies with the acquisition of Wings IT. With experience in the midmarket segment, the company can rapidly implement Core Clouds.

GFT

GFT was qualified as a Rising Star for its rapid growth in the Brazilian market, winning significant clients and building market recognition as a Salesforce partner for Core Cloud implementations.



BRQ



"BRQ has a broad portfolio of Salesforce customers, from various business segments."

Mauricio Ohtani

Overview

BRQ Digital Solutions is a Brazilian services company that has been enabling digital transformation for its customers for 29 years. Its delivery capacity focuses on people, processes and technologies, generating the best experience and convenience for the end user. It has more than 150 clients, distributed in eight countries. The acquisition of TOPi in November 2021 positions the company as one of the main Brazilian partners in the Salesforce ecosystem.

Strengths

Planning and implementation strategy:

BRQ has developed full capability to plan and design the best implementation strategy. It can also analyze the actual state of the customer's environment, investigate and define the best business cases, involve key executives, support definitions and data management and define and design the best user interface.

Agile management methodologies and use of squads:

BRQ has experience and deep knowledge in Agile methodologies. It leverages Squads to analyze and plan the implementation of Salesforce clouds, besides developing complementary solutions to improve processes.

Large customer base in various market segments:

BRQ presents an extensive customer portfolio comprising companies from various industries, which requires from the company a broad domain of the various business conditions, reaction speed, ability to handle specific data and high commitment to the quality of its service delivery.

Caution

Even though it shows competence to work on planning and define the best implementation strategy, besides using agile methodologies and self-manageable *squads*, the projects in the midmarket must be fast and low cost. BRQ must develop a standard implementation model, eliminating customizations to a great extent, to achieve greater efficiency, while maintaining quality of service delivery.





Implementation Services for Marketing Automation Midmarket

Implementation Services for Marketing Automation Midmarket

Who Should Read This Section

This report is relevant to companies across industries in Brazil that are evaluating service providers for implementing Salesforce Marketing Cloud.

In this quadrant, ISG highlights the current market positioning of service providers that implement Marketing Cloud and how they address the key challenges faced by companies locally.

Digital sales have increased dramatically, and organizations have recognized the importance of selling and communicating with their customers in the digital world. Thus, Salesforce's Marketing Cloud is also expanding its customers and vendors specializing in the solution.

Companies with projects that use Salesforce solutions other than Marketing Cloud face the challenge of finding partners to meet all their demands. Many solution providers are considered niche vendors; they are Marketing Cloud specialists but lack competency in other Salesforce products, thus propelling them to

form partnerships to deliver projects involving multiple clouds. For customers, this increases the complexity of managing contracts with their partners, and companies may eventually choose another vendor with a broader Salesforce portfolio.

Therefore, partners that observe this opportunity are expanding their Salesforce offerings with complementary products, increasing their ability to deliver their offerings to customers.



Marketing leaders should read this report to understand service partners' relative positioning and capabilities in implementing the Salesforce Marketing Cloud solutions. The report also highlights vendors' marketing expertise, including their experience in digital marketing and using accelerators.



Security and data professionals should read this report to understand how vendors manage data sources and partnerships in compliance with LGPD, which mandates security and data protection requirements in Brazil.



IT and technology leaders should read this report to understand vendors' relative positioning in implementing Salesforce Marketing Cloud solutions and services. The leaders will also understand vendors' technical capabilities, automation level, AI expertise and development methodologies.



Business strategy leaders should read this report to gain insights into vendors' capabilities to deliver enhanced functionality to marketing teams using Salesforce Marketing Cloud solutions and services.



Salesforce Ecosystem Partners Implementation Services for Marketing Automation Midmarket

Brazil 2023



This quadrant evaluates Salesforce's **specialized marketing cloud providers** that keep up with the **evolution and adoption of the platform** in a highly dynamic and changing segment.

Mauricio Ohtani



Implementation Services for Marketing Automation Midmarket

Definition

This quadrant addresses vendors that specialize in Salesforce Marketing Cloud in one of the most dynamic and changing segments of the market. Companies combine the creativity residing in marketers and the ability to develop digital campaigns to meet the expectations of digital customers; they are using digital tools and methodologies such as *design thinking* and agile processes. Thus, the demand generated by companies and their brands is growing across all business segments with diverse service scopes.

As interaction with end customers often entails a large volume of transactions, automation of these functionalities — e.g., Pardot — is another important success factor in this quadrant. From a functional point of view, 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**) for Salesforce Marketing Cloud, Pardot, and for specific marketing aspects, such as information gathering, customer experience, digital customer journey optimization, and automation of customer interactions
2. Providing **training and enablement of customer's personnel** to use the application
3. Availability of **pre-defined solutions and accelerators**, preferably functionality-oriented and industry-specific
4. Presence of **unique differentials**
5. Economic **stability and significant delivery capabilities** to serve multiple customers
6. Attractive list of **use cases and references**



Implementation Services for Marketing Automation Midmarket

Observations

Lately, Marketing Cloud has been gaining prominence and should soon be Salesforce's most successful one in Brazil. The sales volume of the Marketing Cloud and the tools involved in it is expected to be higher than that of other clouds, including the most successful ones, such as the Core Clouds. Thus, ISG has identified new consulting service partners or even digital marketing agencies operating in this market, considered one of the most dynamic in Brazil.

Some Salesforce partners that offer Marketing Cloud implementation services focus only on this cloud, demonstrating great expertise and an easy understanding of their customers' business.

This capability, however, faces challenges when customers present a need to expand usage to other clouds or Salesforce tools. In these cases, partners resort to forming partnerships with other, possibly competing, companies to meet these requests.

The best-performing partners that realize the benefit in following the expansion of the platform in their main customers, decide to invest and expand their activities, creating knowledge and competence in the most strategic clouds, in addition to the Marketing Cloud. They do this to meet the client's request and foster strong relationships and confidence in the quality of their services, without yet intending to compete in these complementary clouds.

Many advertising agencies participated in the ecosystem because they realized the benefits that the platform offers, especially in aspects, such as personalization actions, conversion improvement work and A/B testing.

Of the 64 companies evaluated for this study, 22 qualified for this quadrant, with nine Leaders and one Rising Star.

accenture

Accenture has invested heavily and rapidly in the Marketing Cloud solution. It strengthened when it combines other units, such as operations and Accenture Song, making its offerings robust, complete and comprehensive.

Capgemini

Capgemini positions the Salesforce practice as the base platform in the Digital Customer Experience unit offering, which focuses on creating experiences that bring value to the business in managing the customer lifecycle.

Deloitte Digital

Deloitte Digital has positioned itself as a digital marketing agency that offers creativity and technology expertise. The Marketing Cloud offering is aimed at its clients' marketing departments and professionals.

Everymind

Everymind has invested in the robustness of its Marketing Cloud offering, expanding its operations in strategy and campaign management. It also has expertise in complementary tools and data analytics, which helps in strategic decision-making processes.

Gentrop

Gentrop specializes in Marketing Cloud and uses its Gentroopers (squads) in deployment projects, operations and integration with other tools of the platform or development of complementary solutions.

Globant

Globant is a digital-native company that has been growing with many acquisitions around the world. It recently acquired Nèscara, but has not yet communicated this to the market. It has been a Salesforce partner for more than 20 years.



Implementation Services for Marketing Automation Midmarket

match.mt

Match.mt is part of the WPP Group, a British multinational holding company of communications and advertising, with a wide and deep knowledge of the Marketing Cloud solutions. A pioneer in the use of the solution, the company stands out not only technically but also for having been formed within a digital marketing agency.

OSF Digital

OSF Digital has Salesforce as its sole technology partner and masters the digital marketing environment. The result of this combination is a powerful performance that enables enterprises' digital marketing initiatives.

valtech.

Valtech is a global digital agency that has been strengthened by the acquisition of Wings IT, a Salesforce partner with great prominence in the Brazilian market. The result of this partnership is a complete and integrated digital marketing services.

JFOX

JFOX is ranked as a Rising Star due to its performance in implementing many Marketing Cloud solutions in client organizations from different business sectors. Its growth plan includes catering to the market's demand for Marketing Cloud.





Managed Application Services for Large Enterprises

Managed Application Services for Large Enterprises

Who Should Read This Section

This report is relevant to large enterprises across industries in Brazil for assessing the vendors of Salesforce managed application services in the large enterprises market.

In this quadrant, ISG defines the current market positioning of Salesforce managed application services providers for large enterprises in the country. Traditional managed services mainly cover outsourcing activities, such as local or remote support and application monitoring. This study includes partners that offer additional services, including administrative assistance, accelerator development and utilization, development services, proactive monitoring and consulting.

Large companies seek managed services partners with a high-quality service delivery system that not only supports routine operations but also introduces new solutions, tools, enhancements and updates to support their environments. The use of automation tools for managed application services has been growing across large organizations.

These tools help increase process agility, reduce operational cost and enhance service value.

Some Salesforce managed services partners that are prominent in the Brazilian market include automation in their offerings, but automation is not unanimous.



Marketing, sales and field service leaders

should read this report to understand service partners' relative positioning and capabilities in helping leaders deploy Salesforce managed application services.



Purchasing professionals should read this report to understand how vendors differ in their approach to Salesforce managed application services in Brazil. The report also highlights how these vendors vary regarding their Salesforce application experience, nature of client base and industry relationships.



Security and data professionals should read this report to understand how partners comply with LGPD in Brazil and the security requirements in their Salesforce managed application service practices.



IT and technology leaders should read this report to understand the relative positioning and capabilities of managed application service providers. The report also compares their technical capabilities in areas such as remote and local monitoring, technology accelerators, incident response and development methodologies.



Salesforce Ecosystem Partners Managed Application Services for Large Enterprises

Brazil 2023



This quadrant considers the vendors' ability to provide **managed services for large enterprises in maintenance and support**, including monitoring, remote support, centralized management, data quality and security, and compliance-related aspects.

Mauricio Ohtani



Managed Application Services for Large Enterprises

Definition

This quadrant evaluates Salesforce vendor partners with the ability to provide 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 customers, this usually includes the ability of vendors to offer these services in the context of global reach and complex application scenarios comprising various solutions from different software vendors.

Another important aspect is the continuous improvement of solutions to generate additional value for the underlying business. Managed services are characterized by the transfer of responsibilities to a service provider and are conducted according to defined SLAs.

Eligibility Criteria

1. Proven operational support experience for end-to-end processes in **complex application scenarios**, with a specific focus on Salesforce products;
2. Availability of **strong methodology** and comprehensive support of tools with a high degree of automation;
3. **Scalable delivery** capabilities to serve large corporate customers;
4. Providing **mature pricing and contract models** with a focus on results-based approaches and continuous improvement;
5. Attractive list of **use cases and references**.



Managed Application Services for Large Enterprises

Observations

Since the last edition of this study conducted in 2022, we have identified an increase in competence and delivery capacity of the partners that qualified for this study. Most of them fit as global companies that add knowledge, experience and resources acquired through acquisitions or operations in other regions and countries. The result is close positioning among the leaders in terms of attractiveness of portfolios and competitive strength in the domestic market. Some have already been well positioned in other ISG Provider Lens studies, offering managed services for applications other than Salesforce and have high delivery capability even though they do not have Salesforce specialization in managed services. Others, especially the local providers, grew in capacity and performance as the companies that acquired them grew strong and increased the opportunities in large and small accounts.

Managed services to their customers, and this offering represents a good portion of their total revenue. They all recognize the importance of sustaining the environment, managing users, application, data, security and critical control of the operation to avoid unwanted outages. However, not all of them apply automation tools, which, besides speeding up the processes, can reduce the cost of the operation, benefiting customers with the reduction in the price of the service.

Of the 64 companies evaluated for this study, 16 qualified for this quadrant with six Leaders and one Rising Star.

accenture

Accenture dominates the managed services market for enterprise and complex applications, with several global and local solutions being managed in conjunction with the Salesforce platform.

Capgemini

Capgemini offers a hybrid package of services based on traditional managed services accompanied by a continuous improvement methodology aligned with the Salesforce platform.

Deloitte Digital

Deloitte Digital is prepared to meet the local demand for managed services and uses its Global Delivery Center Network to enable client solution recommendations quickly.

Everymind

Everymind has been increasing its maturity in delivering managed services over the years and applying its methodologies in the execution of services.

OSF Digital

OSF Digital offers immediate resolution for unforeseen failures and corrects the errors in the implemented systems and applications. It also provides training on the platform as needed.

valtech

Valtech provides guaranteed uptime of the Salesforce platform. It also helps define and implement interfaces and test integration with other applications.



BRQ was considered a Rising Star for its growth potential in managed services. Its list of global and local technology partners creates opportunities for quick problem-solving through access to strategic information and resources.



BRQ

Overview

BRQ Digital Solutions is a Brazilian services company that has been enabling digital transformation for its customers for 29 years. Its delivery capacity focuses on people, processes and technology, generating the best experience and convenience for the final consumer. In addition, it has more than 150 companies in its client portfolio distributed in eight countries. The acquisition of TOPI, which occurred in November 2021, positions the company as one of the main Brazilian partners in the Salesforce ecosystem.

Strengths

Long experience in the services market:

BRQ is a long-standing Brazilian company, offering services that enable digital transformation in its clients. It acquired TOPI at the end of 2021, which specializes in Salesforce. Together, they created a robust, complementary organization, with extensive capacity in implementation, integration and managed services of the platform.

Broad offer in the execution of the service:

BRQ offers a wide list of services that make up the managed services offering in the Salesforce platform. Some of them are performance and incident management, execution of upgrades, management of data quality and volume, monitoring interfaces, user management, as well as testing and optimization of licenses.

Wide list of technology partners:

BRQ has developed partnerships with many relevant global and local technology companies, which benefits Salesforce users in solution technical data and partner-specific resources, which can be quickly allocated to troubleshoot any issues.

Caution

BRQ should improve its communication and publicize its success cases with managed services for Salesforce multinationals. Although the company has extensive experience and a large customer base, the lack of information about success cases can be an opportunity for competitors that, on the contrary, extensively publicize their achievements and successes.





Managed Application Services for Midmarket

Managed Application Services for Midmarket

Who Should Read This Section

This report is relevant to small and midsize enterprises across sectors in Brazil that are evaluating vendors of Salesforce managed application services.

In this quadrant, ISG defines the current market positioning of Salesforce managed application services providers for small and midsize businesses in the country. Traditional managed services mainly cover outsourcing activities, such as local or remote support and application monitoring. This study covers vendors that offer additional services, including administrative assistance, accelerator development and utilization, development services, proactive monitoring and consulting.

Small and midsize businesses in Brazil continue to prioritize geographic proximity to their suppliers, although it is not essential for the services provided. Moreover, due to the size of the national territory, some regions do not have sufficient Salesforce partners to meet the demand of this company profile. Aiming at this growth opportunity in the country, CRM giant Salesforce has been seeking to increase its partners in different areas of Brazil.

Salesforce managed application service providers that choose pricing models based on customer outcomes, such as performance, availability or productivity, have shown better results in retaining these midmarket and small customers.



Marketing, sales and field service leaders should read this report to understand service partners' relative positioning and capabilities in helping leaders deploy Salesforce managed application services.



Purchasing professionals should read this report to understand how vendors differ in their approach to Salesforce managed application services in-country. The report also highlights how these vendors vary regarding their Salesforce application experience, nature of client base and industry relationships.



Security and data professionals should read this report to understand how vendors comply with LGPD in Brazil and the security requirements in their Salesforce managed application service practices.



IT and technology leaders should read this report to understand the relative positioning and capabilities of managed application service providers. The report also compares their technical capabilities in areas such as remote and local monitoring, technology accelerators, incident response and development methodologies.



Salesforce Ecosystem Partners Managed Application Services for Midmarket

Brazil 2023



This quadrant considers the vendors' ability to provide **managed services for midsize businesses for maintenance and support, which include monitoring, remote support**, centralized management, data quality and security, and compliance-related aspects.

Mauricio Ohtani



Managed Application Services for Midmarket

Definition

This quadrant focuses on the vendors' ability to provide managed services for maintenance and support functions. These include services for monitoring, remote support, centralized management of Salesforce applications, data quality management, data security, and compliance-related functions. Midsize customers generally have smaller integration requirements and, in many cases, a more regional focus. Another important aspect is the continuous improvement of solutions to generate additional value for the underlying business. Managed services are characterized by transferring responsibilities to a service provider and are conducted according to defined SLAs.

Eligibility Criteria

1. Proven experience in **operational application support** with a 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 multiple customers;
4. Providing **mature pricing and contract models** with a focus on results-based approaches and continuous improvement;
5. Attractive list of **use cases and references**.



Managed Application Services for Midmarket

Observations

The medium and small business segment has been Salesforce's growth target in Brazil. The partners that best fit this challenge are not the large and global ones. These companies aim for imposing and complex projects, in the expectation of obtaining a long relationship. In Brazil, the pyramid that represents the number of companies according to their size is flatter when compared to other regions in the world. The slice that represents medium and small companies is much wider and shows a *green field* to be explored. Salesforce is aware of this and is looking for new partners in various regions of the country to work closely with this company profile, either to upgrade an existing environment, expand the use of solutions or even to implement the clouds and offer managed services.

The profile of these companies shows low flexibility and tolerance. They decide more frequently and quickly to switch suppliers in case of misalignment between what was contracted and delivered, or in case of a lot of dissatisfaction with the quality of the service.

When the service company is contracted to implement the solution, in theory, the challenge of deciding to change the supplier is greater. However, to manage the services after the implementation, and in theory, these companies do not hesitate to look for another supplier. This means that the best-performing partners in this segment offer pricing models tied to the customer's business results, whether by performance, availability, or productivity.

Of the 64 companies evaluated for this study, 16 qualified for this quadrant, with seven Leaders and one Rising Star.

accenture

Accenture has clients in the intermediary segment that are part of its performance strategy with expectations of growth. Its delivery capacity is the same for large companies, and so are its prices in this segment.



BRQ has strengthened its performance in the midmarket with the acquisition of TOPI, a specialist in the Salesforce platform. It has professionals qualified in managed services.

Capgemini

Capgemini has structured a package of services configured according to the client's profile. Both large and medium-sized companies choose the best configuration of services they want to receive.

Everymind

Everymind has extensive experience working in the intermediary market with several clients from various segments. Besides creating service offerings based on the characteristics of this segment, it creates accelerators that increase the operation's productivity.

JFOX

JFOX has structured an approach to its sales process that includes end-to-end services, including managed services from the Salesforce platform.

OSF

OSF Digital guarantees its customers to deliver agility and competitiveness in the operation of the Salesforce environment. Based on long experience, the company employs productivity tools and accelerators.



Managed Application Services for Midmarket

valtech.

Valtech is a Marketing Cloud specialist and thus, it offers managed services for the solution as well as for all other clouds on the Salesforce platform.

SysMap

SysMap has been rated a Rising Star for the structured model, on which it has built its managed services offering, and for its consistent growth in the market.



BRQ



"BRQ offers Salesforce managed services and is strengthened by the acquisition of TOPi."

Mauricio Ohtani

Overview

BRQ Digital Solutions is a Brazilian services company that has been enabling digital transformation for its customers for 29 years. Its delivery capacity focuses on people, processes and technology, generating the best experience and convenience for the final consumer. It has more than 150 companies in its client portfolio, distributed in eight countries. In addition, the acquisition of TOP Information, which occurred in November 2021, positions the company as one of the main Brazilian partners in the Salesforce ecosystem.

Strengths

Managed services for medium-sized companies: BRQ has a notable performance both in large and medium-sized companies. The characteristics imposed by medium-sized companies require more agility and less complexity in the technology projects. BRQ is adapted to this model with adequate infrastructure, qualified and experienced professionals in the management and delivery of services managed in Salesforce.

Support at the end of the implementation: BRQ ends the implementation phase with support to the application's use. Right in the first weeks of follow-up, in which qualified and experienced professionals are allocated, BRQ can identify areas of opportunity in which training recommendations or customizations are needed.

Collaborative process and ITIL

methodology: BRQ inherited from TOPi the implementation of a collaborative process that helps in the application of standards and good practices in Salesforce application management. In addition, the ITIL methodology is also used in the processes and workflows in the management of the environment.

Caution

The acquisition of TOPi by BRQ resulted in robust Salesforce practice, consolidating the expertise in the platform with the long experience and extensive knowledge in technology services. The result of this union should be capitalized with wide dissemination in the market and success cases obtained after the merger of operations.





Implementation Services for Industry Clouds

Implementation Services for Industry Clouds

Who Should Read This Section

This report is relevant to enterprises across sectors in Brazil that are evaluating the vendors involved in implementing Salesforce industry clouds.

In this quadrant, ISG defines the current market positioning of Salesforce industry clouds implementation and integration service providers in the country and how they address key business challenges locally.

The consumer goods, finance and healthcare sectors drive the market for Salesforce industry clouds in Brazil. The latter two industries have complex environments that handle sensitive information, and thus their customers are more demanding with respect to service delivery quality compared to other sectors.

When deploying Salesforce industry clouds, companies consider factors such as integration with applications and systems recognized in the market, use of accelerators and proprietary methodologies, and partners' knowledge of Salesforce solutions.

With the increasing demand for these solutions in Brazil, companies are investing in training and certifying professionals in different industries to increase their delivery capabilities and expand their areas of operation.



Marketing and sales leaders should read this report to understand the relative positioning and competencies of service providers for Salesforce industry clouds.



IT and technology leaders should read this report to understand the relative positioning and capabilities of partners in helping leaders adopt industry cloud products and further analyze how their technical capabilities and development methodologies can be compared to the rest of the market.



Field service managers should read this report to understand how Salesforce partners implement and expand the uses of industry clouds to better manage field service operations.



Business strategy leaders should read this report to gain insights into vendors' capabilities to deliver enhanced functionalities to different industry sectors using industry cloud solutions and services from Salesforce.





Vendors evaluated in this quadrant offer **implementation services focusing on Salesforce industry solutions**, such as Financial Services Cloud and Health Cloud.

Mauricio Ohtani



Implementation Services for Industry Clouds

Definition

This quadrant includes implementation service providers focused on Salesforce industry solutions such as Financial Services Cloud and Health Cloud. Industry-specific skills and appropriate accelerators are important success factors for this quadrant. In addition, service providers need to have the ability to develop comprehensive solutions based on the various Salesforce products that are relevant in a specific customer situation. With Salesforce currently moving its offerings toward greater verticalization, 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.

Eligibility Criteria

1. **Proven domain** knowledge for the respective sectors
2. Strong implementation resources (**consulting, configuration, data migration, go-live**) on Salesforce industry solutions and the products provided by Vlocity (acquired by Salesforce)
3. Deep understanding of Salesforce **data architecture**
4. Presence of **unique differentiators**, e.g., proven industry-specific accelerators;
5. Economic **stability** and **significant delivery capabilities** to serve multiple customers;
6. Attractive list of **use cases and references**.



Implementation Services for Industry Clouds

Observations

Salesforce is expected to expand its industry solutions portfolio. Since the acquisition of Vlocity in 2020, specializing in specific customizations for some industry segments, Salesforce has been expanding its portfolio. Currently, there are 14 different industries available to Salesforce customers, offering benefits and advantages of the platform targeted to clients with different business models.

All sectors of the economy are undergoing digital transformation. Some faster, some not so fast. However, all companies need to connect with their customers in an agile, objective, and personalized way.

Even though there were companies in Brazil that were partners of Vlocity, before the acquisition, there is still room to grow both in the number of certified partners and in the diversity of offerings and maturity in Salesforce Industries.

This study reveals that the Brazilian market shows a large concentration with few global partners, specializing in various industries. Of the companies analyzed and qualified for this study, only four, all global, present the EX (Expert) certification in more than five segments. Only two companies (global) present the same certification for two to five quadrants. When we downgraded the certification level to L2 (Level II Specialist), we found five companies with offerings for more than five quadrants and 14 companies with offerings between one and five quadrants.

Of the 64 companies evaluated for this study, 14 qualified for this quadrant, with six being Leaders and one being a Rising Star.



Accenture has extensive expertise and has developed dozens of solutions and accelerators that complement Salesforce's Cloud solutions.



Capgemini has a long track record in the Brazilian market with its technology service offerings. Its partnership with Salesforce results in a client portfolio with relevant organizations.

Deloitte Digital

Deloitte Digital is one of the largest global firms with thousands of industry experts, helping clients achieve the best results in Industry Cloud operations.

Everymind

Everymind is a Salesforce specialist and stands out for using its industry experts, who understand the client's business and deliver the best alternatives for the challenges presented.

OSF Digital

OSF Digital works exclusively with Salesforce and uses productivity tools to help its customers gain performance in operating Industry Clouds.

valtech.

Valtech has formed a powerful organization by acquiring Wings IT and developed an integrated formula with productivity tools to help customers achieve maximum productivity in Salesforce solutions.

GFT

GFT was rated as a Rising Star for gaining prominence in Salesforce with significant customers in its portfolio, rapid growth and maturity in industry solutions.





Appendix

The ISG Provider Lens™ 2023 - Salesforce Ecosystem partners report analyzes the relevant software vendors/service providers in the Brazil market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of March 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 & Editor Biographies



Author

Mauricio Ohtani
Analyst

Analyst and Author, Mauricio Ohtani brings extensive experience in researching the Brazilian and Latin American services markets. Mauricio is a senior consulting partner at TGT Consult in Brazil. With more than 30 years of experience, he has developed and served in different roles in the information technology market for various vertical sectors, supporting many countries in Latin America.

Prior to TGT and ISG, Mauricio was Area Vice President at Gartner Inc., responsible for the research and consulting business in Brazil and Latin America.



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Gabriel Sobanski is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Salesforce, ServiceNow, Microsoft, SAP, Cybersecurity and ADM. His area of expertise includes industry, logistics and market research.

During his tenure, he has supported research authors and created Business Context and Global Summary reports with market trends and insights.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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iSG

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

For more information, visit isg-one.com.





APRIL, 2023

REPORT: SALESFORCE ECOSYSTEM PARTNERS