



# HFS Top 10 Salesforce Services 2020 – Excerpt for Accenture

HFS Research authors:

Khalda De Souza, Research Director

**TOP 10**  
HFS

April 2020

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

—*Khalda De Souza, Research Director*

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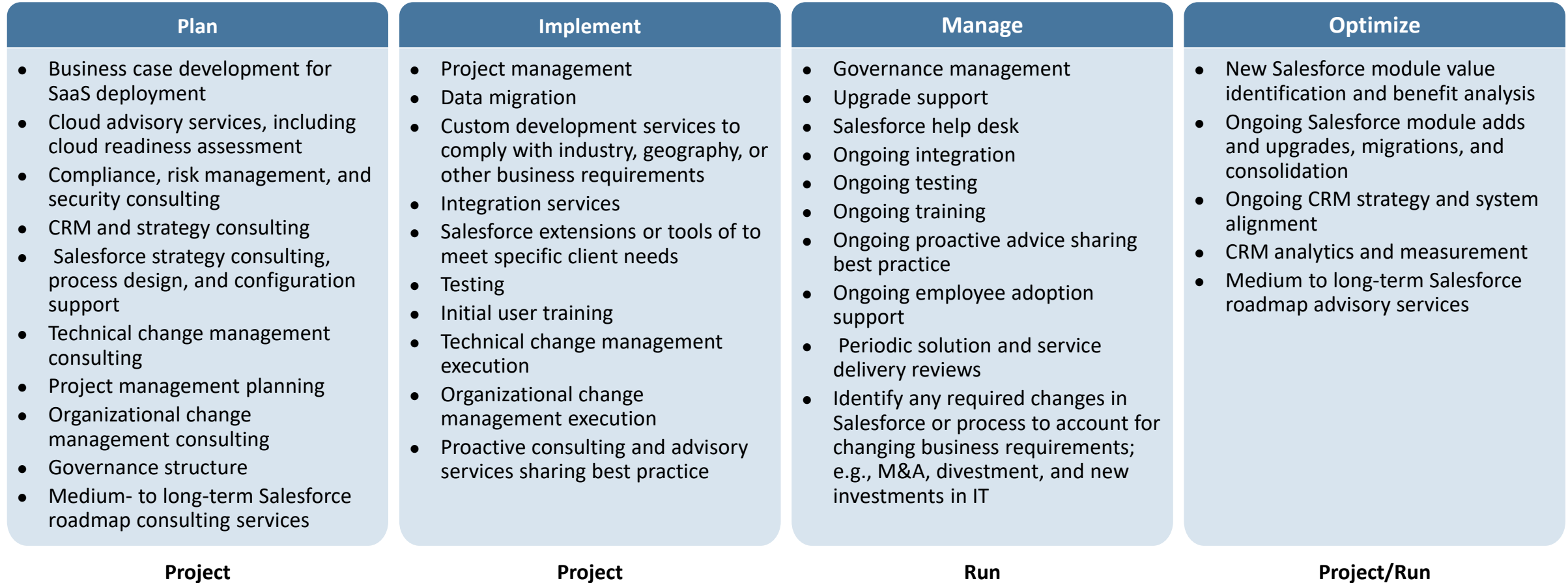
# Introduction, definitions, and research methodology

# Introduction and definitions

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

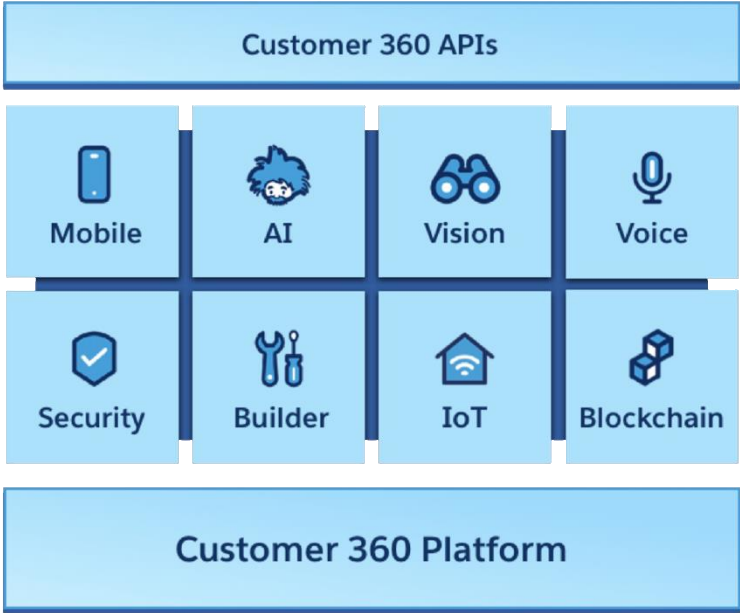
# HFS Salesforce Services value chain

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



# Salesforce Solutions: Salesforce Customer 360

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



Source: Salesforce 2020

# Research methodology

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



33.3%

## Ability to execute

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



33.3%

## Innovation capability

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



33.3%

## Voice of the customer

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



# Salesforce services providers assessed in this report

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accenture

APPIRIO<sup>®</sup>  
A WIPRO COMPANY

bluewolf  
an IBM Company

Capgemini

Cognizant

Deloitte.

Infosys

NTT DATA

pwc

TATA  
CONSULTANCY  
SERVICES

virtusa

# Executive summary

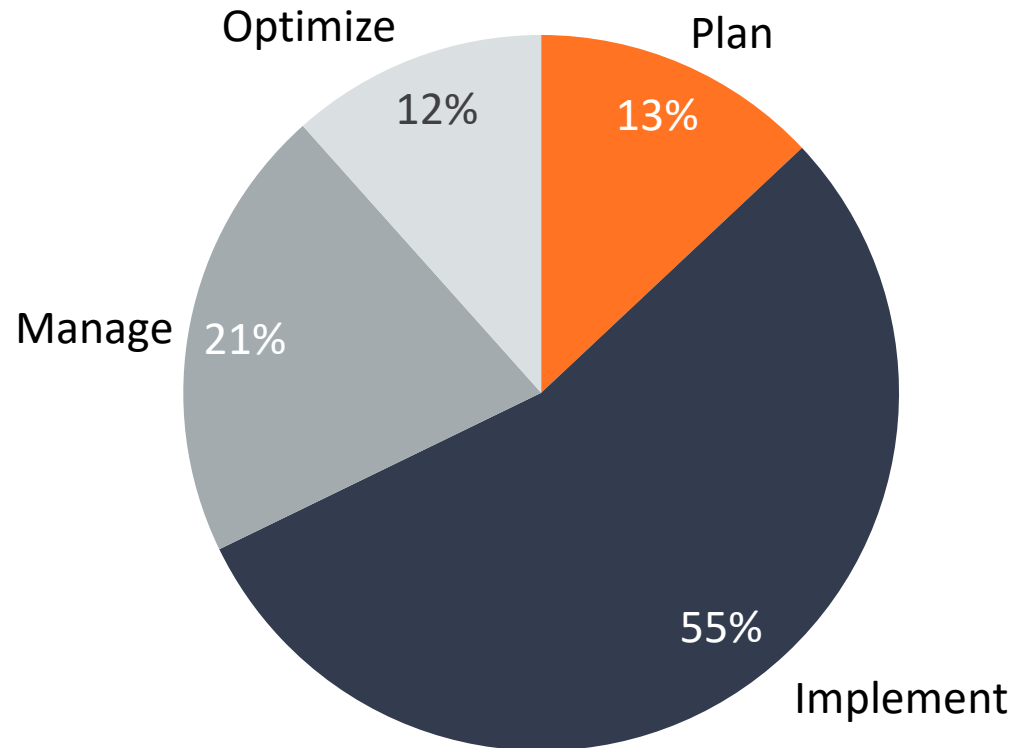
# Salesforce services provider investments

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

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

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

# Approximate split of Salesforce services business by value chain services



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

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

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

# Salesforce services market snapshot

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

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

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

# Salesforce services market snapshot (continued)

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

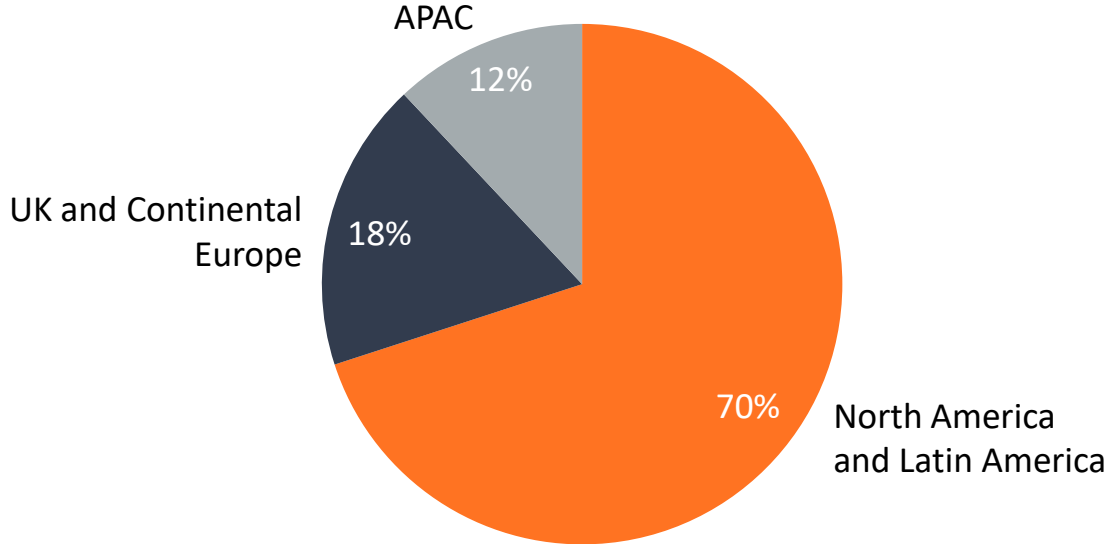
Top three fastest growing Salesforce solutions	<ol style="list-style-type: none"><li>1. Financial Services Cloud</li><li>2. Marketing and Commerce Cloud</li><li>3. CPQ Cloud</li></ol>
Other certifications or solutions mentioned	<ol style="list-style-type: none"><li>1. Platform Developer</li><li>2. Einstein Analytics</li><li>3. Financial Services Cloud</li><li>4. Integration Cloud and Mulesoft</li></ol>

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

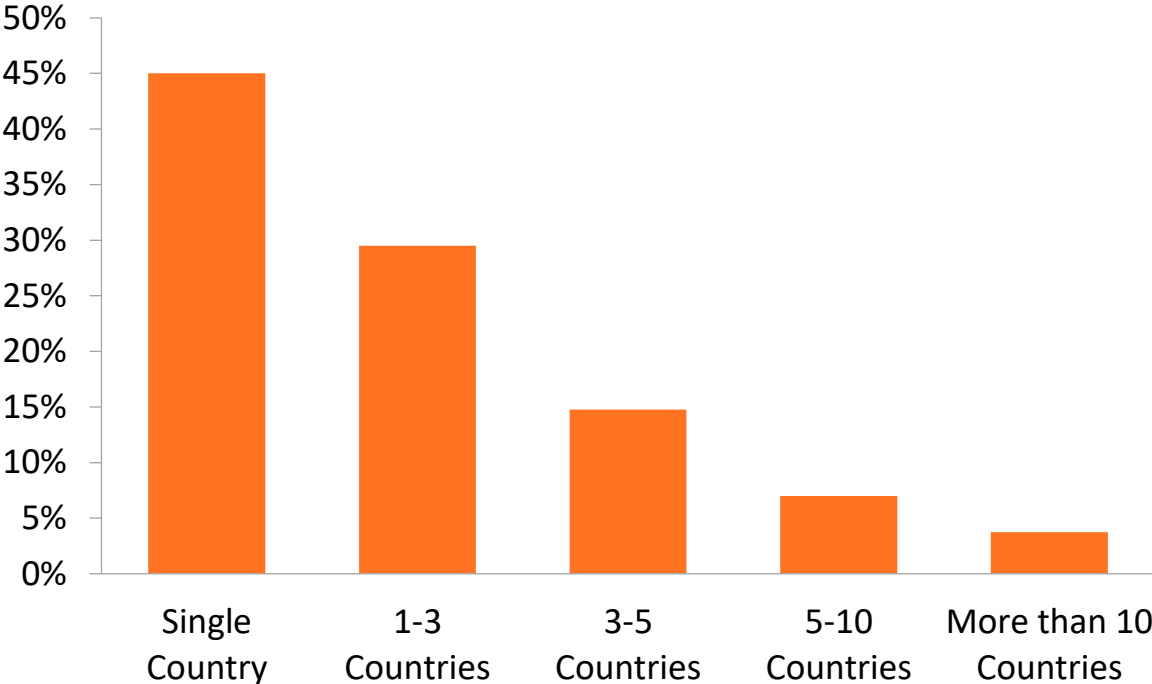
Aggregate responses of service providers in this Top 10  
Source: HFS Research, February 2020

# Salesforce services business by geography

Split of Salesforce services business by geography



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



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



# Salesforce Services: Voice of the Customer

## Why Salesforce?

It is the best solution to meet our business needs

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

It is scalable and will grow with our organization

It is the industry leader

Our peers, partners, or suppliers are using it

We were already using it in one department and liked it

The seamless integration between clouds

### Which other solution(s) did you consider?

- Oracle
- SAP
- Microsoft Dynamics
- Cloudfuse
- Apptus

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

## Why this service provider?

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1

References

2

Technical  
expertise

3

Catered to  
specific  
business needs

4

Existing  
positive  
experience

5

Flexibility

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

## Client satisfaction with Salesforce services

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



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

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

# Salesforce Services Partners

# Salesforce services partner categorization

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

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

Partner level categorization is as follows:

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

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

# The HFS Salesforce services Top 10 results






























































































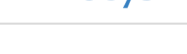
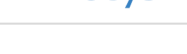
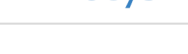
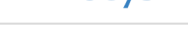
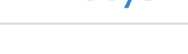


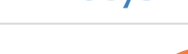

## Summary of Salesforce service providers assessed in the report

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

# Notable performances in HFS Salesforce services Top 10

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

# HFS Top 10 Salesforce Services Rankings 2020

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

# Salesforce Services Provider Profile

# Biggest pool of certified Salesforce consultants with a focus on continuous innovation

Dimension	Rank	Strengths	Opportunities													
HFS Top 10 position	#1	<ul style="list-style-type: none"> <li><b>Breadth of services and market experience:</b> Accenture has an intense focus on training, re-skilling, and upskilling Salesforce consultants. Its full value chain coverage of offerings is strengthened by investment in partnership and acquisitions, such as Phase One in 2017 for the US federal market. Its digital arm, Accenture Interactive, has acquired more than 30 digital marketing agencies around the world, including MXM in 2018. Accenture has the biggest Salesforce practice and number of Salesforce certified consultants in this research. Clients highlight that accessibility to the strong resources is a big strength for Accenture. One client said that Accenture was “the best we have encountered or could hope for” to support a global deployment.</li> <li><b>Depth of services:</b> Accenture’s Salesforce Business Group continues to invest in developing new solutions, including industry and horizontal Salesforce assets. Examples include its myConcerto digital platform to create a business case and roadmap for Salesforce clients. Accenture is also co-located with Vlocity engineering teams to create industry solutions. Examples include the Vlocity Pensions Solution.</li> <li><b>Business transformation strength:</b> Accenture’s Salesforce services methodologies promote interaction between IT, the business, and the service provider. This is supported by more than 200 tools and accelerators, including organizational change management services. Accenture’s Living Business strategy adapts to customer’s continually evolving needs.</li> <li><b>Continual innovation focus:</b> In 2018, Accenture launched a new Innovation Center for Salesforce in its San Francisco office, located in Salesforce Tower. This highlights the strength of Accenture as a leading Salesforce partner. Accenture and Salesforce also have joint equity investments in Vlocity, cloud banking solution provider nCino, and container management platform provider Docker.</li> <li><b>Partnership relationship:</b> Clients commend Accenture on its true partnership relationship. One client said that Accenture was the “primary contributor to our success.”</li> </ul>	<ul style="list-style-type: none"> <li><b>Awareness and cost:</b> Accenture is a clear leader in this market. Its main challenges include its ability to market its vast expertise to potential clients. Some clients also believe that Accenture is expensive compared with competitors, but they should compare like for like experience and capability rather than pure costs.</li> </ul>													
Ability to Execute	#1															
Breadth of services and delivery capability	#1															
Depth of services	#1															
Market and team experience	#1															
Innovation capability	#1															
Vision for the development of offerings	#1	<table border="1"> <thead> <tr> <th>Relevant acquisitions and partnerships</th> <th>Key clients</th> <th>Operations*</th> <th>Technology tools and platforms</th> </tr> </thead> <tbody> <tr> <td> <b>Acquisitions include:</b> <ul style="list-style-type: none"> <li>SinnerSchrader (2017)</li> <li>Media Hive (2017)</li> <li>Phase One (2017)</li> <li>MXM (2018)</li> </ul>           Digital marketing agency acquisition examples: Bow &amp; Arrow (2019), Insitum (2019), Shackleton (2019), Droga5 (2019), Hjaltelin Stahl (2019), Storm Digital (2019)         </td> <td>           Accenture works with clients across all industry sectors. More than 75% of Salesforce services work won in the last fiscal year was with repeat clients.         </td> <td> <ul style="list-style-type: none"> <li><b>Partner level:</b> Global Strategic</li> <li><b>Salesforce Certified Consultants:</b> 8,983</li> <li><b>Average number of certifications per consultant:</b> 2.9</li> <li><b>Certified technical architects:</b> 22</li> <li><b>Total number in practice:</b> 18,500</li> <li><b>Number of projects completed:</b> 1,400+ client programs last year</li> </ul> </td> <td> <ul style="list-style-type: none"> <li>My Concerto: Digitally integrated, end-to-end enterprise transformation platform of pre-configured, multi-industry solutions for fast implementation.</li> <li>42 Master Salesforce Expertise, 3 certified, 1 specialist.</li> <li>18 Master Industry Expertise: Full list of Masters can be found on AppExchange.</li> <li>Industry Solutions include: Moments That Matter (MTM) in Retail Banking, MTM in Service, MTM in Retail, Accenture Multimedia Ad Sales Solution, Accenture Moments Manager in Hospitality, Accenture Wholesaler 360, Accenture Intelligent Payer Platform (INTIENT), Accenture Health Experience Platform, Accenture Customer Experience Solution for Utilities, Accenture Automated Framework for Testing (AAFT) for Salesforce, Dev Ops Platform for Salesforce.</li> <li>Accenture myWizard automation platform: This is used for project management and to implement and measure enterprise automation strategy.</li> <li>Journey to the Cloud offering tools: These include the Intelligent Cloud Planning tool and Cloud Platform Assessment tool.</li> <li>200+ tools and accelerators including organizational change management efforts.</li> </ul> </td> </tr> <tr> <td> <b>Partnerships include:</b> <ul style="list-style-type: none"> <li>Salesforce’s #1 Global Strategic Partner</li> <li>Anaplan, Apttus, Box, CipherCloud, Callidus Cloud, ClickSoftware, Cloud Sense, Docker, Informatica, Kinaxis, Kronos, Medallia, nCino, ServiceNow, PROS, Tableau, Veeva, Vlocity, Xactly, Zuora</li> </ul> </td> <td> <b>Industry coverage, in order of Salesforce services revenues:</b> <ul style="list-style-type: none"> <li>Products</li> <li>Communications, media, and technology</li> <li>Financial services</li> <li>Resources</li> <li>Health and public services</li> </ul> </td> <td> <b>Key delivery locations for Salesforce practice:</b> <ul style="list-style-type: none"> <li>NA: US, Canada</li> <li>Latin America</li> <li>Europe: UK, Ireland, Gallia, the Nordic countries</li> <li>APAC: India, The Philippines, Australia and New Zealand</li> </ul> </td> </tr> <tr> <td> <b>Publicly disclosed clients include:</b> <ul style="list-style-type: none"> <li>Radisson, CenturyLink, Ab InBev, Marriott, News Corp, ENGIE, Generali, Deutsche Bank, Shiseido, AMP, Volvo, Unilever, Vodafone, Siemens, Schneider Electric, National MS Society, Nielsen, United Utilities</li> </ul> </td> <td></td> <td></td> </tr> </tbody> </table>	Relevant acquisitions and partnerships	Key clients	Operations*	Technology tools and platforms	<b>Acquisitions include:</b> <ul style="list-style-type: none"> <li>SinnerSchrader (2017)</li> <li>Media Hive (2017)</li> <li>Phase One (2017)</li> <li>MXM (2018)</li> </ul> Digital marketing agency acquisition examples: Bow & Arrow (2019), Insitum (2019), Shackleton (2019), Droga5 (2019), Hjaltelin Stahl (2019), Storm Digital (2019)	Accenture works with clients across all industry sectors. 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Relevant acquisitions and partnerships	Key clients		Operations*	Technology tools and platforms												
<b>Acquisitions include:</b> <ul style="list-style-type: none"> <li>SinnerSchrader (2017)</li> <li>Media Hive (2017)</li> <li>Phase One (2017)</li> <li>MXM (2018)</li> </ul> Digital marketing agency acquisition examples: Bow & Arrow (2019), Insitum (2019), Shackleton (2019), Droga5 (2019), Hjaltelin Stahl (2019), Storm Digital (2019)	Accenture works with clients across all industry sectors. More than 75% of Salesforce services work won in the last fiscal year was with repeat clients.		<ul style="list-style-type: none"> <li><b>Partner level:</b> Global Strategic</li> <li><b>Salesforce Certified Consultants:</b> 8,983</li> <li><b>Average number of certifications per consultant:</b> 2.9</li> <li><b>Certified technical architects:</b> 22</li> <li><b>Total number in practice:</b> 18,500</li> <li><b>Number of projects completed:</b> 1,400+ client programs last year</li> </ul>	<ul style="list-style-type: none"> <li>My Concerto: Digitally integrated, end-to-end enterprise transformation platform of pre-configured, multi-industry solutions for fast implementation.</li> <li>42 Master Salesforce Expertise, 3 certified, 1 specialist.</li> <li>18 Master Industry Expertise: Full list of Masters can be found on AppExchange.</li> <li>Industry Solutions include: Moments That Matter (MTM) in Retail Banking, MTM in Service, MTM in Retail, Accenture Multimedia Ad Sales Solution, Accenture Moments Manager in Hospitality, Accenture Wholesaler 360, Accenture Intelligent Payer Platform (INTIENT), Accenture Health Experience Platform, Accenture Customer Experience Solution for Utilities, Accenture Automated Framework for Testing (AAFT) for Salesforce, Dev Ops Platform for Salesforce.</li> <li>Accenture myWizard automation platform: This is used for project management and to implement and measure enterprise automation strategy.</li> <li>Journey to the Cloud offering tools: These include the Intelligent Cloud Planning tool and Cloud Platform Assessment tool.</li> <li>200+ tools and accelerators including organizational change management efforts.</li> </ul>												
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Positioning of the service provider in this market	#1															
Ability to drive long-term business value	#1															
Voice of the customer	#5															

\*Source: Salesforce AppExchange and service provider

# About the author



**Khalda De Souza**

Research Director, SaaS Services and Cyber Security Services

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

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

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



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