Everest Group®

Everest Group PEAK Matrix® for Salesforce Industry Cloud Service Provider 2023

Focus on Accenture
December 2022

Everest Group
PE∧K
MATRIX®

Background of the research

Early adopters of Salesforce services were looking to effectively manage customer relationships, market targeted products, explore sales performance, and drive cost efficiency riding on the cloud wave. As the Salesforce technology landscape broadened, enterprises' approach toward Salesforce has evolved from a reactive relationship management approach to a proactive approach toward Customer Experience (CX). Enterprises leverage CX as a key channel that opens new streams of revenue. They seek to create a 360-degree customer view leveraging advanced analytics to better engage and offer a personalized experience to generate new opportunities.

In recent times, enterprise expectations have evolved to generate faster RoI from their Salesforce investments. In this regard, Salesforce has introduced its industry cloud products and augmented industry capabilities through the acquisition of Vlocity. In order to respond to these evolving demand themes, IT service providers are investing in building industry-specific solutions to expedite time-to-market needs for their clients and have also made tuck-in acquisitions to fill gaps across their Salesforce services portfolio and further enhance their geographic footprint.

In this research, we present an assessment and detailed profiles of 16 Salesforce providers featured on the Salesforce Industry Cloud services PEAK Matrix®. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading Salesforce providers, client reference checks, and ongoing analysis of the Enterprise Platform Services market.

This report includes the profiles of the following 16 leading Salesforce service providers featured on the Salesforce Industry Cloud Services PEAK Matrix:

- **Leaders:** Accenture, Deloitte, and IBM
- **Major Contenders:** Capgemini, Cognizant, Globant, Infosys, NTT DATA, OSF Digital, PwC, Silverline, TCS, and Wipro
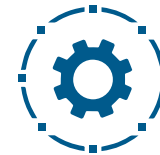- **Aspirants:** Birlasoft, Marlabs, and Tech Mahindra

Scope of this report

Geography
Global

Providers
16 leading Salesforce
service providers

Services
Salesforce Industry
Cloud services

Introduction and scope

Everest Group recently released its report titled "Salesforce Industry Cloud Services PEAK Matrix® Assessment 2023". This report analyzes the changing dynamics of the Salesforce Industry Cloud services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 16 service providers on the Everest Group PEAK Matrix® for Salesforce Industry Cloud services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of Salesforce Industry Cloud service providers based on their absolute market success and delivery capability.

Based on the analysis, **Accenture emerged as a Leader.** This document focuses on **Accenture's** Salesforce Industry Cloud services experience and capabilities and includes:

- Accenture's position on the Salesforce Industry Cloud services PEAK Matrix
- Detailed Salesforce Industry Cloud services profile of Accenture

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Source: Everest Group (2022)

Salesforce Industry Cloud services PEAK Matrix® characteristics

Leaders:

Accenture, Deloitte, and IBM

- Leaders have taken a consulting-led approach to assist clients in large-scale transformational deals
- They have attained the highest level of Salesforce industry expertise for most of the industries covered by Salesforce and have received multiple innovation awards
- Leaders continue to keep pace with the market dynamics through continued investments in capability development (internal IP/tools, CoEs, acquisitions, partnerships, etc.)
- Leaders have a strong focus on talent and invest heavily in upskilling and cross-skilling their resources across multiple Salesforce certification streams/trails
- They have a strong global delivery network and onshore presence that helps them win transformational multi-geography Salesforce services deals

Major Contenders:

Capgemini, Cognizant, Globant, Infosys, NTT DATA, OSF Digital, PwC, Silverline, TCS, and Wipro

- Major Contenders have demonstrated end-to-end proof points in 3-4 industries of their focus
- They have attained the highest level of Salesforce industry expertise for multiple industries and have received multiple innovation awards from Salesforce
- Major Contenders are taking a heavy solution-led approach by building accelerators/frameworks as well as offering bolt-on solutions on Salesforce AppExchange to demonstrate better credentials and understanding of the Salesforce technology landscape
- They exhibit flexible engagement & solutioning approach to build long-term client relationships
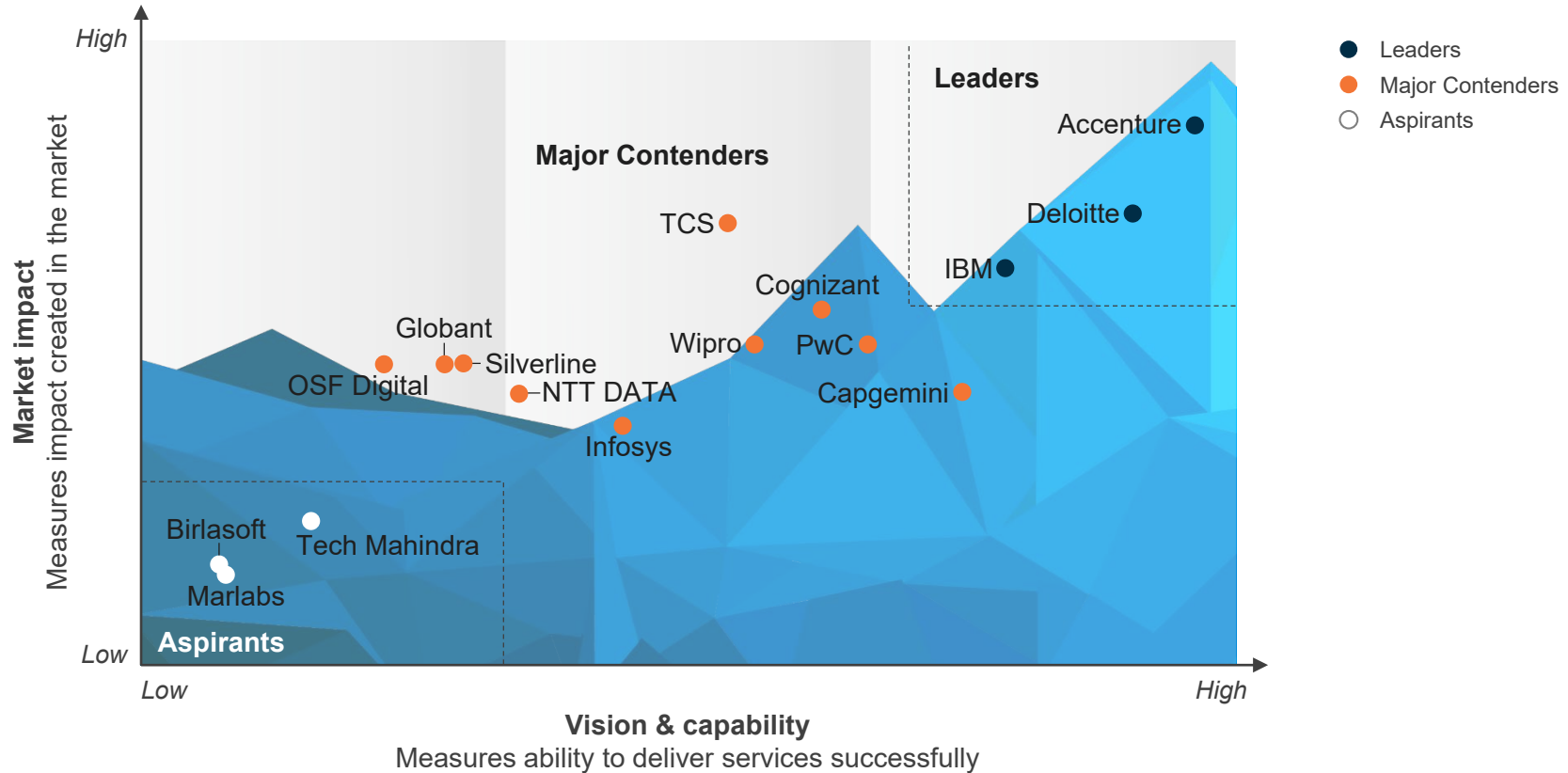
Aspirants:

Birlasoft, Marlabs, and Tech Mahindra

- Aspirants have maintained a good CSAT score and are largely focused on catering to small and midsize buyer segments
- They have focused on a limited number of industries and are investing in building industry-specific solutions to expedite time-to-market for their clients
- They have a limited pool of Salesforce-certified talent and lack top-level Salesforce industry expertise

Everest Group PEAK Matrix®

Salesforce Industry Cloud Services PEAK Matrix® Assessment 2022 | Accenture positioned as a Leader

Everest Group Salesforce Industry Cloud Services PEAK Matrix® Assessment 2022[1]

- ● Leaders
- ● Major Contenders
- ○ Aspirants

Market impact — Measures impact created in the market

Vision & capability — Measures ability to deliver services successfully

Chart labels: Leaders, Major Contenders, Aspirants; Accenture, Deloitte, IBM, TCS, Cognizant, Wipro, PwC, Capgemini, Globant, Silverline, OSF Digital, NTT DATA, Infosys, Birlasoft, Tech Mahindra, Marlabs

1 Assessments for Capgemini, Deloitte, IBM, OSF Digital, PwC, Silverline, and Wipro exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2022)

Accenture | Salesforce industry cloud services profile (page 1 of 4)
Everest Group assessment – Leader

Measure of capability: ◔ Low ● High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
◕	◕	●	●	●	◕	●	●	●

Strengths

- Accenture's consistency in winning Salesforce Partner Innovation Awards and recognition with the highest industry expertise level indicates its capability and credibility in the market

- Clients have recognized Accenture for its track record of successful implementations, techno-functional expertise, and a scaled talent pool of industry cloud resources

- Its strong industry knowledge in financial services and healthcare & life sciences, its ability to orchestrate capabilities through thought leadership, and a consulting-led approach make it suitable for large-scale transformation deals

- Accenture has built a strong suite of IP tools/frameworks/solutions focused on financial services, energy & utilities, and public sector to expedite time-to-market

Limitations

- Accenture is positioned as a premium-priced partner in Salesforce engagements. It becomes a deterrent for cost-conscious clients

- Most of Accenture's clients are companies with >US$10 billion revenue. Enterprises from the Small and midsized Buyers (SMBs) segment may not find Accenture suitable for small-scale implementations

- Accenture's portfolio is skewed toward North America. Clients from other regions need to evaluate Accenture's delivery capabilities in their region

- Accenture's focus on Salesforce manufacturing and consumer goods cloud is relatively less. It may cause hindrances for clients in these industries to partner with Accenture

Accenture | Salesforce industry cloud services profile (page 2 of 4)
Overview

| Low (<10%) | Medium (10-25%) | High (>25%) |

Vision for Salesforce industry cloud services

Changing customer expectations are pushing Accenture's clients to look beyond just optimizing their front offices − they aim to become experienced-led businesses. That requires connecting the front office together and extending to the mid office. This lies at the heart of how Accenture thinks about industry cloud services. Accenture helps its clients solve their biggest challenges by using Salesforce industry clouds along with other clouds to achieve full digital transformation. Accenture strengthens firms by including deep industry expertise and differentiation as well as compressed transformations, including composable technology, modern change, and operations.

Salesforce industry cloud services revenue

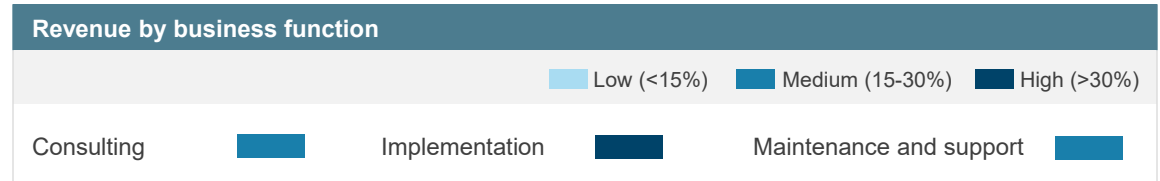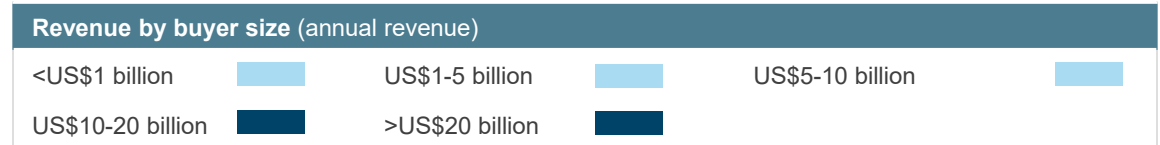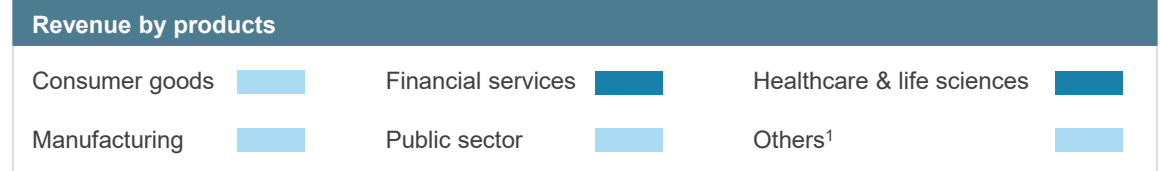| <US$50 million	US$50-100 million	US$100-200 million	>US$200 million

Salesforce industry product specializations:	Financial services cloud, consumer goods cloud, communication cloud, health cloud, energy & utilities cloud, insurance, loyalty management, manufacturing cloud, media cloud, net zero cloud, public sector solutions, and Salesforce scheduler
Salesforce Customer Satisfaction score (CSAT):	4.6/5.0
Salesforce projects completed:	1,400-1,550
Salesforce-certified experts:	7,400-7,500
Overall Salesforce industry product expertise level:	Level II Specialist

Revenue by products

Consumer goods	Financial services	Healthcare & life sciences
Manufacturing	Public sector	Others[1]

Revenue by geography

North America	Europe	United Kingdom
Asia Pacific	MEA	South America

Revenue by buyer size (annual revenue)

<US$1 billion	US$1-5 billion	US$5-10 billion
US$10-20 billion	>US$20 billion	

Revenue by business function

| Low (<15%) | Medium (15-30%) | High (>30%) |

Consulting	Implementation	Maintenance and support

1 Others include automotive, higher education, retail, media, communications, transportation & hospitality, and nonprofit

Accenture | Salesforce industry cloud services profile (page 3 of 4)
Accelerators, industry solutions, and investments

Proprietary horizontal accelerators/solutions/frameworks to aid service delivery (representative list)		
IP name	**Focused Salesforce industry cloud product(s)**	**Details**
Accenture Go Digital in Communication	Communications cloud	Accenture's IT modernization proposal, unlocks business agility, configurability, scalability, elasticity, automation, and resilience to achieve lean operations, easing access to leading edge innovation and ecosystem interoperation.
Patient Experience Accelerator (PExA)	Health cloud	PExA is a set of methodologies, frameworks, and CRM platform components that provides a foundation for the application of enterprise CRM capabilities in a healthcare provider environment.
Connected Front Office for Consumer Goods	Consumer goods cloud	Strategic revenue management focused on enabling core revenue management and trade investments in the digital landscape; Efficient marketing to rethink and connect sales, service, distribution, and marketing−related systems around customer loyalty; Data-driven Experience D2C marketing & commerce to fuel digital growth and lower operating expenses through data-led insights

Industry solutions built on Salesforce platform that are certified and hosted on Salesforce marketplace (representative list)		
Solution name	**Focused function**	**Details**
Accenture Oil Field Equipment Services Partner Engagement Bolt	Community cloud	Accenture oil field equipment services bolt solution allows partners to seamlessly integrate their ecosystem, capture and digitize data at the source, flow the data upstream and downstream, and enable a single version of the truth for invoicing.
Accenture Connected Resolution Engine – Industrial	Sales cloud, service cloud	The Connected Resolution Engine improves the end-to-end customer experience throughout the service journey. It translates IoT sensor readings into meaningful and actionable resolution steps.

Other investment (representative list)		
Investment name	**Focused Salesforce industry cloud product(s)**	**Details**
Accenture Ventures	Multiple salesforce cloud solutions	Accenture and nCino expanded alliance to accelerate digital transformation within the top US banks 2017
Acquisition	Multiple salesforce cloud solutions	Accenture completed acquisition of Workday, Salesforce, and US MuleSoft Practices of Sierra-Cedar 2020
Talent Investment	Multiple salesforce cloud solutions	Skills 2 Succeed South Africa − partnership with Salesforce and CapaCiti to train and skill a minimum of 150 candidates over 12 months. Aims to build 500+ new skills and over 1,000 new certifications over a 24-month period with the ability to support customers, the broader African continent, and growth market ecosystems

Accenture | Salesforce industry cloud services profile (page 4 of 4)
Case studies

Case study 1	National Wildlife Federation

Business challenge

Garden for Wildlife, part of the (NWF), has a community of seven million participants dedicated to helping local wildlife thrive in the United States in the face of habitat loss. To help counteract problems such as bird population problem, Garden for Wildlife educates people on the best ways to create habitats with native plants to support wildlife habitats in urban and suburban spaces. NWF wanted to build on that momentum and increase participation among millennial parents on educating their children on environmental issues.

Solution

- Demand for native plants is outstripping supply by 14%, the value for unmet demand was US$13 billion
- Accenture designed business-to-consumer cloud-based e-commerce platform to connect interested gardeners with local growers, helping fill the 14% gap in the market by a simpler, direct route to supply
- Worked closely with NWF on the brand strategy and design for the new garden for wildlife website, social media campaign assets, and paid media planning
- Designed in a period of two weeks; included mobile responsive site to accommodate millennial users
- It built the e-commerce function using Shopify and integrated it with the Salesforce experience cloud

Impact

- The solution was implemented in less than 12 weeks and was launched in 20 states
- Wildlife enthusiasts can now visit the website for selecting the most appropriate garden kits and supplies based on motivation, location, and growing conditions
- As of September 2021, 18,000 plants have been introduced by the garden for wildlife community across 3,500 gardens, providing approximately 200,000 sq ft. of garden habitat and supporting approximately 90% of butterfly and moth species in a local area

Case study 2	North American public health department

Business challenge

A North American public health department is responsible for disease control and prevention across its state. The state uses an exchange that accepts data from healthcare providers and laboratories. This helps the state and its multiple Local Health Departments (LHDs) identify the spread of disease and act. The state had to manage the rollout of vaccines, which required a connected system for vaccine ordering. This would allow provider requests for vaccine orders to be reviewed by LHDs – a capability that the state did not have at the time.

Solution

- Accenture worked with CDPH to develop a timeline for implementing Salesforce for contact tracing
- Established CalCONNECT – a Salesforce organization to manage contacts, cases, and communication aspects of the contact tracing solution, and connected it to CalREDIE
- Used MuleSoft CloudHub for initial deployment due to its immediate availability
- MuleSoft footprint includes MuleSoft Anypoint platform for runtime and API management
- MuleSoft provides a robust toolset for mapping and orchestration, with components such as DataWeave and out-of-the-box connectors
- These capabilities allowed Accenture and MuleSoft to quickly adapt to changes in the CalCONNECT data model as well as the approach for interacting with CalREDIE and other systems
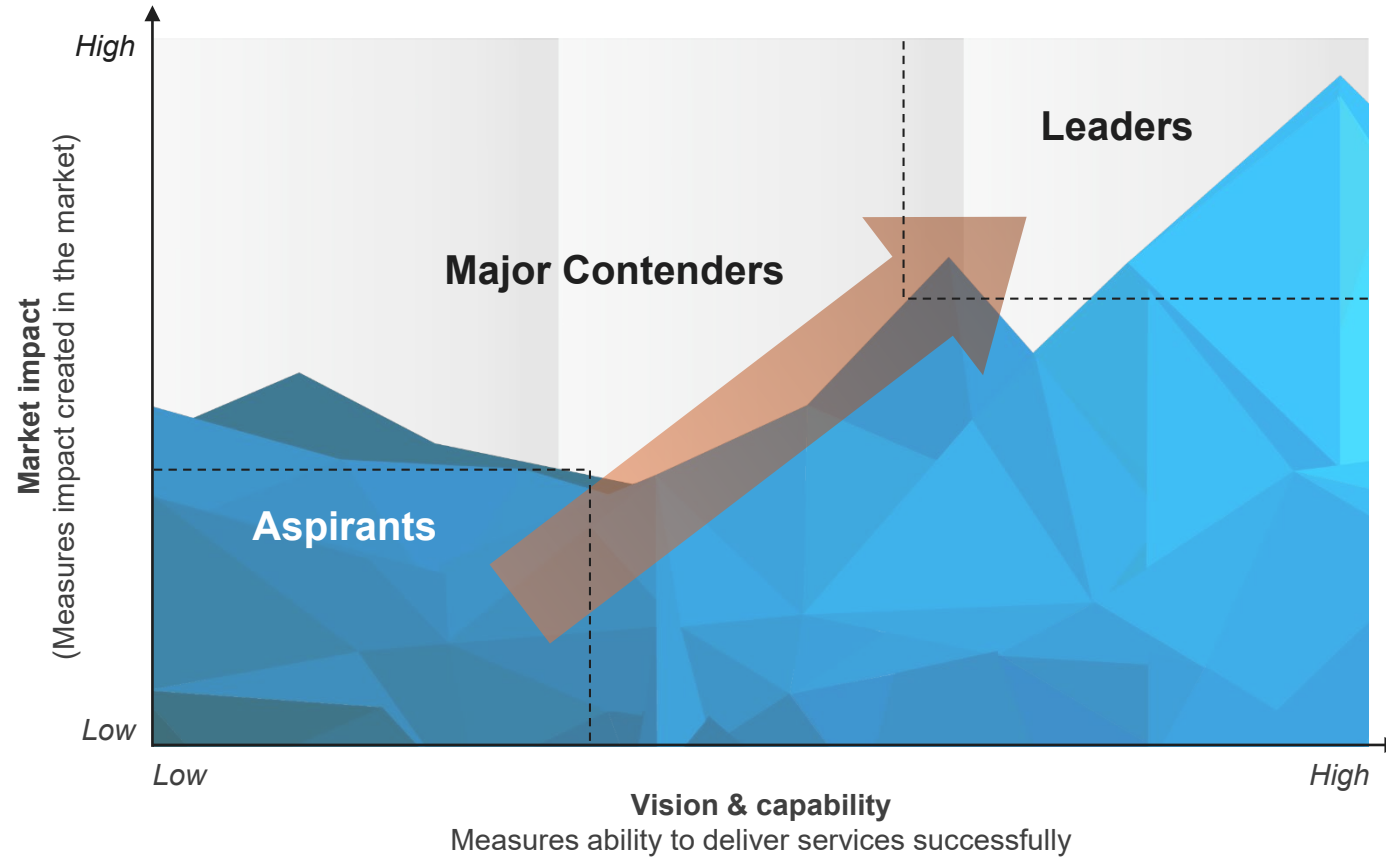
Impact

- As part of CDPH's contact tracing program, MuleSoft enabled the creation of around 20,000-60,000 cases per day to be sent from CalREDIE to CalCONNECT
- In total, CalCONNECT contacted 1.75 million Californians who tested positive for COVID-19
- Built more than 30 integrations and reused over 33% of the APIs

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix

Services PEAK Matrix® evaluation dimensions

Measures impact created in the market –
captured through three subdimensions

Market adoption
Number of clients, revenue base,
YOY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across
geographies and type of engagements

Value delivered
Value delivered to the client based
on customer feedback and
transformational impact

Market impact

Leaders

Major Contenders

Aspirants

Vision & capability
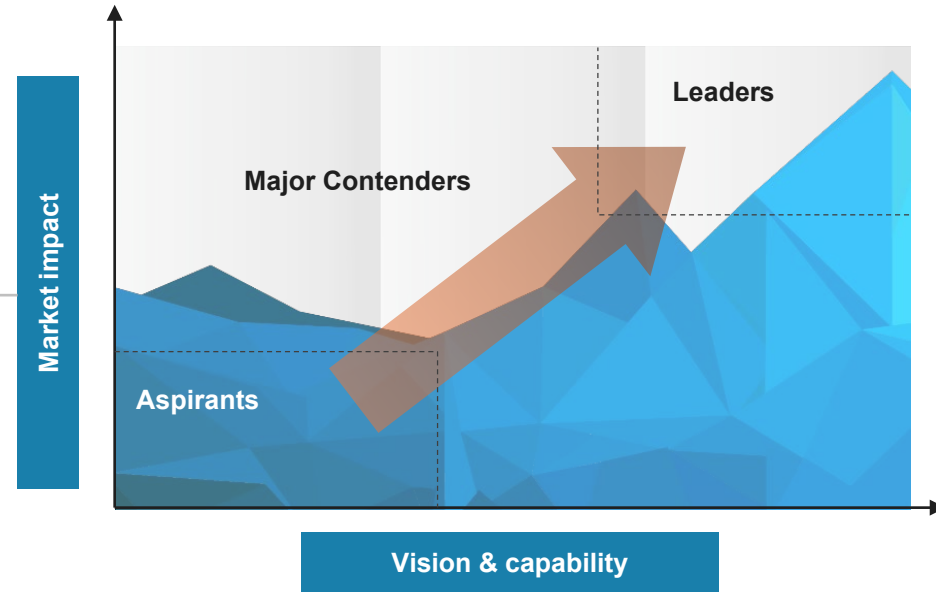
Measures ability to deliver services successfully.
This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future
roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio
across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling
areas, e.g., technology IP, industry/domain
knowledge, innovative commercial
constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a "Major Contender" or "Aspirant" on the PEAK Matrix, an unfavorable outcome?
No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the "PEAK Matrix position"?
A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a "Leader", "Major Contender," or "Aspirant" title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own "profile" that is published by Everest Group as part of the "compendium of PEAK Matrix providers" profiles

What is the process for a provider / technology vendor to leverage their PEAK Matrix positioning and/or "Star Performer" status ?
- Providers/vendors can use their PEAK Matrix positioning or "Star Performer" rating in multiple ways including:
  - Issue a press release declaring their positioning. See citation policies
  - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  - Quotes from Everest Group analysts could be disseminated to the media
  - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises

Everest Group®

With you on the journey

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