IDC MarketScape

IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2022 Vendor Assessment

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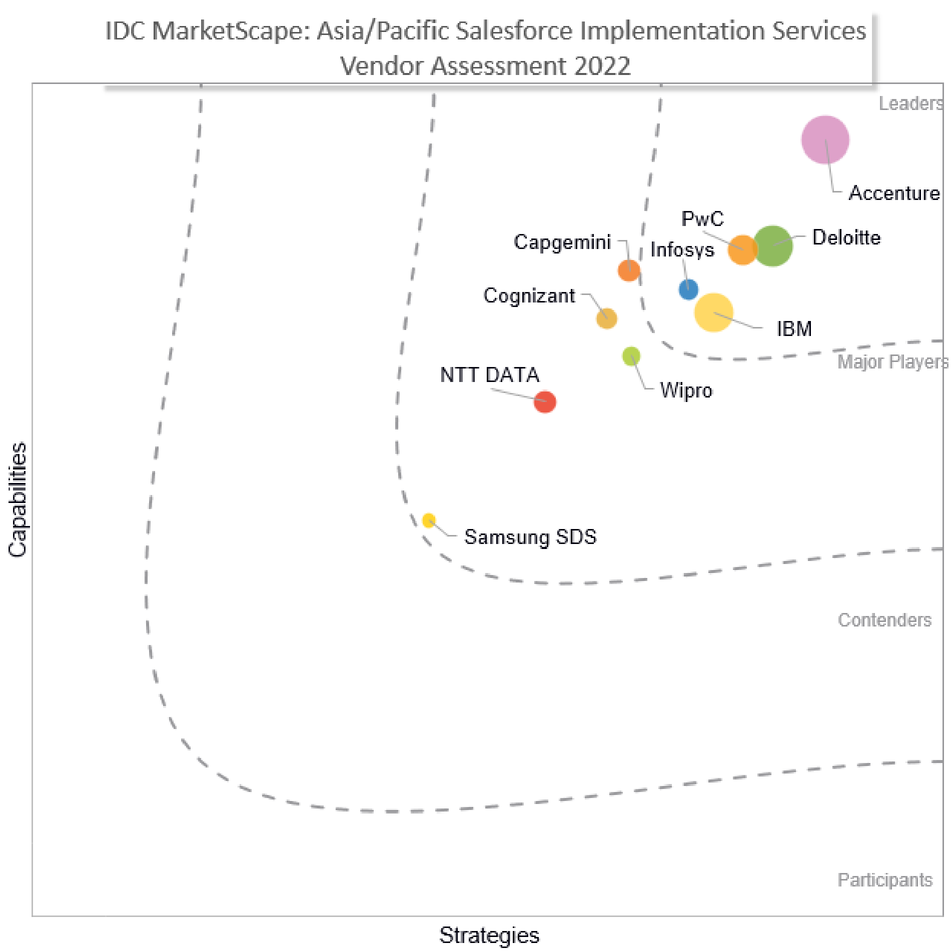
THIS MARKETSCAPE EXCERPT FEATURES: INFOSYS

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2022 Vendor Assessment



Source: IDC, 2022

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

IN THIS EXCERPT

The content for this excerpt was taken directly IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2022 Vendor Assessment (Doc #AP48916222). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Advice for Technology Buyers, Featured Vendor Profile, Appendix and Learn More. Also included are Figure 1 and Figure 2.

IDC OPINION

According to IDC's *2022 Asia/Pacific Software Survey*, improving customer experience (CX) and customer satisfaction was one of the top 3 business priorities by enterprises in Asia/Pacific. As such, enterprises are accelerating their technology-led front-office transformation initiatives to create new experiences. Over the years, Salesforce has positioned itself as an experience transformation enabler capable of converging data and intelligence to transform every aspect of the CX, ensuring there is business value generation throughout the customer journey. According to Salesforce Asia/Pacific witnessed tremendous growth in its adoption and is now a key strategic region, making up approximately 10% of Salesforce's overall global revenue for the FY22 period.

As Salesforce adds new products to its portfolio (Slack, Tableau Software, MuleSoft, Vlocity, work.com, etc.), align its go-to-market (GTM) with industry solutions, and ties its value proposition to business outcomes, the implementation of Salesforce solutions has become increasingly complex. Enterprise buyers bank on the expertise of their implementation service partners to enhance (and in some cases, realize) the value of their investments by tailoring solutions to their respective industry, integrating with internal business systems, attaching localized support services, and extending innovations on the Salesforce platform to fit long-term business needs. Consequently, the services ecosystem around Salesforce implementation is expected to grow as fast, if not faster, than Salesforce has in Asia/Pacific.

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

- **The time of generic Salesforce solutions is over**. IDC found that buyers of Salesforce solutions are no longer looking for implementation partners with capabilities in core Salesforce clouds but partners that can contextualize solutions for industries and integrate multiple Salesforce solutions to transform experiences. Vendors analyzed in this study continue to make progress in bundling solutions that tap into the capabilities of multiple clouds and Salesforce solutions that address key industry pain points and enhance customer engagements through personalized journeys.
- **Back-office integration to drive data unity**. Buyers continue to demand stronger back-office and data integration to elevate the value proposition of Salesforce as an experience transformation enabler not just for customers but also for internal stakeholders. Vendors highlighted their focus to help customers enable stronger integration with business systems and create an integrated data strategy, with analytics, artificial intelligence (AI), and automation.

- **Doubling down on talent strategy**. The ongoing war on talent is intensifying as the Salesforce technical talent base continues to be stretched thin across Asia/Pacific. The SP ecosystem is finding it a challenge to attract new talents, and it is an even bigger challenge to retain them. The SP ecosystem is deepening its talent proficiency and certifications across core and new Salesforce product portfolios, especially in MuleSoft, Einstein, Lightning, Tableau Software, and so forth.
- **Localize for customer stickiness**. Salesforce has improved its localization focus by expanding high-touch services and integration with local systems that customers come in contact with, such as payment channels, stores, social media, and so forth. To maximize value from Salesforce investments, customers rely on the expertise of SPs in the market units they operate. Vendors in this study are investing to service customers with local consultants, technical architects, innovation hubs, and delivery centers.
- **Salesforce business units yet to hone GTM**. In the last iteration of this study, vendors were taking a focused approach to Salesforce services and built dedicated practice teams to bolster CX capabilities with Salesforce as the technology core. IDC found several vendors yet to bring service capabilities across new product areas, such as Slack, MuleSoft, and Tableau Software, under the newly built practice to channelize a uniform GTM for Salesforce solutions.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This evaluation does not offer an exhaustive list of all the players in Asia/Pacific Salesforce implementation services partner ecosystem. IDC narrowed down the field of players based on the following criteria and subsequently collected and analyzed data on these 10 implementation services partners for this IDC MarketScape:

- **Revenue**. Each SP was required to have a total revenue (from Salesforce implementation services) that exceeded US$20 million in 2021 in Asia/Pacific.
- **Geographic presence**. Each vendor was required to have service delivery capabilities in at least three subregions among Australia and New Zealand (ANZ), Greater China, South Korea, Southeast Asia, India, and Japan.
- **Service capabilities**. The vendor should have demonstrated end-to-end service capabilities around Salesforce implementation, including advisory/design/consulting, migration, customizations, and systems integration (SI).
- **Products covered**. SPs should provide implementation services around any of the product categories: Sales Cloud, Service Cloud, Marketing Cloud, and Commerce Cloud. Additional products covered include Revenue Cloud (configure–price–quote [CPQ] and billing), Experience Cloud, Sustainability, Analytics Cloud, Tableau Software, Slack, MuleSoft, Work.com, Salesforce Platform, and Salesforce Industry Cloud solutions (includes Vlocity).

ADVICE FOR TECHNOLOGY BUYERS

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

- **Think beyond CRM implementation**. Salesforce has transformed its value proposition beyond the realms of a CX transformation tool to an engagement platform, transforming employee experience and customer journeys. Leverage the expertise of Salesforce partners that can bring together tools, best practices, methodologies, and multicloud and SI experience to elevate the value proposition of Salesforce solutions beyond the CX organization. Partner with implementation SPs that foster a culture of innovation to drive maximum value from Salesforce investments.

- **Give adequate attention to change management**. To maximize the value from Salesforce investments, enterprises need to provide ample weightage to people and process changes along with the technology integration changes required for transformation. Invest in a holistic change management strategy that captures the requirements of the sales and marketing team, tracks outcomes from the implemented solution, and creates a feedback loop to foster continuous innovation.
- **Consider industry expertise**. As Salesforce continues to align its portfolio of solutions to address key industry pain points, it is important to consider the industry expertise of the implementation partner to contextualize solutions and provide key industry insights at various stages of implementation that can provide superior time to value and upfront cost savings.
- **Look for strong local support capabilities**. Many customers interviewed by IDC indicated the need for high-touch support from Salesforce and its partners, especially where there are multiple integrations with external and internal applications. Hence, evaluate the partner's local support capabilities and synergy with the Salesforce team in the country to ensure proactive support during implementation.
- **Evaluate vendors**. Use this IDC MarketScape in contract negotiations and as a tool to not only shortlist vendors for Salesforce implementation services bids but also evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise (technical, industry-based, or otherwise).

FEATURED VENDOR PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

Infosys

According to IDC's analysis and buyer perception, Infosys is positioned in the Leaders category in the 2022 IDC MarketScape: Asia/Pacific Salesforce Implementation Services Vendor Assessment.

Since the strategic acquisition of systems integrators Simplus and Fluido in 2018, Infosys has consistently increased its coverage area in the Salesforce ecosystem globally and in Asia/Pacific. Additionally, with the acquisition of digital and CX agencies, such as Carter Digital, Oddity, and Blue Acorn iCi, Infosys has strengthened its agency and CX transformation capabilities in the region.

Infosys provides end-to-end implementation services (design, advisory, consulting, SI, migration, maintenance, etc.) across its entire portfolio of Salesforce offerings.

Infosys drives differentiation in the Salesforce services market on its industry-aligned solutions and expertise in implementing core Salesforce solutions for large and midtier customers in the Asia/Pacific region. To facilitate this, Infosys has realigned and channelized its Salesforce service offerings under the "envision, expand, evolve, excel, and elevate" (5E) theme. Envision consists of a set of design thinking and consulting services to amplify the digital capabilities of the enterprise. Expand includes a set of frameworks to modernize existing landscape using the Infosys digital maturity model. Evolve is focused on accelerating time to value through agile deployments, industry solutions, Infosys tools, and accelerators. Excel focuses on continuous innovation through application management service. Finally, elevate is focused on partner enablement and scale through training services across multiple clouds. Infosys showcases strong use cases in which it supported the deployment of Sales Cloud, Service Cloud, CPQ, and Salesforce industry cloud solutions, especially in telecom, financial services, and manufacturing.

Infosys has fostered a collaborative relationship with Salesforce and has jointly innovated solutions at the product level, including return to work, vaccine management, and industry-specific solutions in manufacturing, education, and sustainability.

Infosys has a balanced Salesforce resource strength in Asia/Pacific, currently housing most of its Salesforce resources in India, followed by ANZ, Southeast Asia, Greater China, and Japan. At the time of this study, the largest verticals in Infosys's Salesforce practice in Asia/Pacific were communications and media, telecom, financial services, and manufacturing.

Strengths

Infosys's strengths are:

- **Highly localized GTM for Asia/Pacific**. Infosys showcased well-rounded localization in its GTM for Salesforce services in Asia/Pacific, with specified approaches in each market unit in which it operates (ANZ, Southeast Asia, Japan, Greater China, and India).
- **Industry alignment**. Infosys has strengthened the industry alignment in its Salesforce practice by structuring sales, delivery, and COEs to complement its GTM. This pivot has helped Infosys position Salesforce solutions to address CX pain points in key industries.
- **Innovation alignment**. Infosys emphasized its efforts to continuously cultivate client innovation on Salesforce solutions, leveraging the Infosys Center for Emerging Technology Solutions (iCETS). Infosys also leverages its regional innovation hubs to enable client collaboration and solutions prototyping.

Challenges

Infosys's challenges are:

- Clients would appreciate if Infosys strengthened its focus on agile delivery methodologies and increased the share of technical consultants in its implementation team.
- IDC recommends Infosys amplify its long-term focus on Salesforce solutions, especially improving opportunity assessments in client engagements.

Consider Infosys When

Infosys is a good fit for enterprises looking for a Salesforce implementation partner with an industry focus, experience handling large Salesforce implementation projects, and the ability to deliver complex SI requirements.

APPENDIX

Reading an IDC MarketScape Graph

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

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

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

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

IDC MarketScape Methodology

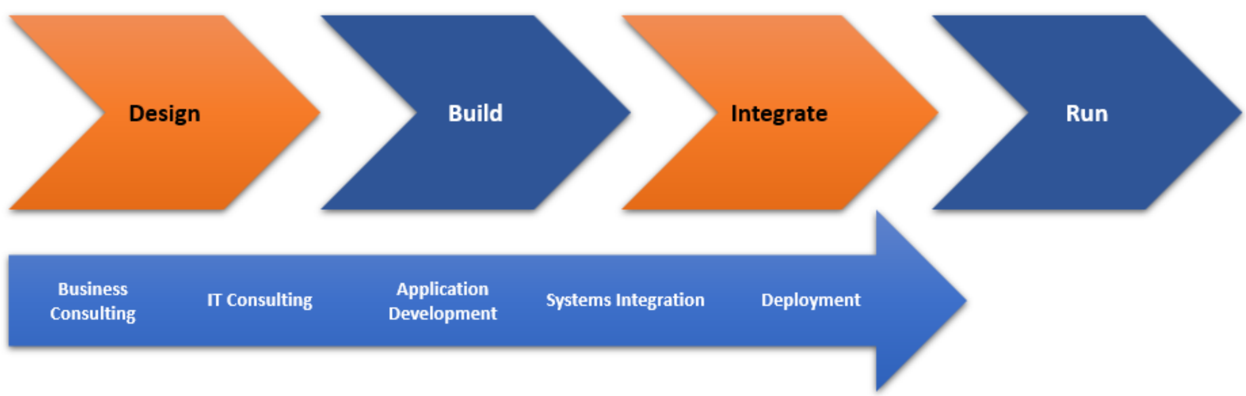
IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders,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

Market Definition

The Salesforce implementation services market covers the design, build, and integrate functions of the design–build–run function chain (see Figure 2). The design phase includes both IT and business consulting. For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2021* (IDC #US44916019, March 2021).

FIGURE 2

IDC's Design–Build–Run Function Chain



Source: IDC, 2022

LEARN MORE

Related Research

- *Asia/Pacific (Excluding Japan) Business Consulting Services Market Shares, 2021: IDC's Top 10 Vendors* (IDC #AP48492522, August 2022)
- *IDC MarketScape: Worldwide Salesforce Implementation Services 2021 Vendor Assessment* (IDC #US47073921, November 2021)
- *The Evolving Salesforce Implementation Services Landscape in APEJ: How Can SPs Target Opportunities in the New Normal* (IDC #AP47380021, Aug 2021)
- *IDC Survey Spotlight: Which Applications Are Organizations Planning to Modernize to the Cloud?* (IDC# AP48492922, Jun 2022)
- *IDC's Worldwide Services Taxonomy, 2021* (IDC #US44916019, March 2021)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of SPs participating in the Salesforce implementation services market with specific offerings and capabilities in the segment. It discusses both the quantitative and qualitative characteristics that lead to success in the ecosystem. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to one another and the criteria and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

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

About IDC

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