HFS Top 10 Salesforce Services 2020

Excerpt for Appirio

HFS Research authors:

Khalda De Souza, Research Director
“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.


- 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.
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.

### HFS Salesforce Services value chain

<table>
<thead>
<tr>
<th>Plan</th>
<th>Implement</th>
<th>Manage</th>
<th>Optimize</th>
</tr>
</thead>
</table>
| ● Business case development for SaaS deployment  
● Cloud advisory services, including cloud readiness assessment  
● Compliance, risk management, and security consulting  
● CRM and strategy consulting  
● Salesforce strategy consulting, process design, and configuration support  
● Technical change management consulting  
● Project management planning  
● Organizational change management consulting  
● Governance structure  
● Medium- to long-term Salesforce roadmap consulting services | ● Project management  
● Data migration  
● Custom development services to comply with industry, geography, or other business requirements  
● Integration services  
● Salesforce extensions or tools of to meet specific client needs  
● Testing  
● Initial user training  
● Technical change management execution  
● Organizational change management execution  
● Proactive consulting and advisory services sharing best practice | ● Governance management  
● Upgrade support  
● Salesforce help desk  
● Ongoing integration  
● Ongoing testing  
● Ongoing training  
● Ongoing proactive advice sharing best practice  
● Ongoing employee adoption support  
● Periodic solution and service delivery reviews  
● Identify any required changes in Salesforce or process to account for changing business requirements; e.g., M&A, divestment, and new investments in IT | ● New Salesforce module value identification and benefit analysis  
● Ongoing Salesforce module adds and upgrades, migrations, and consolidation  
● Ongoing CRM strategy and system alignment  
● CRM analytics and measurement  
● Medium to long-term Salesforce roadmap advisory services |

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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.

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.

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.

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

- Accenture
- Appirio
- Bluewolf
- 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.
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
Salesforce services: example services opportunities for services providers

- **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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combined Salesforce services practice headcount</td>
<td>~50,000</td>
</tr>
<tr>
<td>Combined Salesforce certified consultant headcount</td>
<td>~30,000</td>
</tr>
<tr>
<td>Top three Salesforce services certifications currently held</td>
<td></td>
</tr>
<tr>
<td>1. Salesforce Certified Sales Cloud Consultant</td>
<td></td>
</tr>
<tr>
<td>2. Salesforce Certified Service Cloud Consultant</td>
<td></td>
</tr>
<tr>
<td>3. Salesforce Platform App Builder</td>
<td></td>
</tr>
<tr>
<td>Top three Salesforce services certifications planned in the next 12 months</td>
<td></td>
</tr>
<tr>
<td>1. Marketing Cloud</td>
<td></td>
</tr>
<tr>
<td>2. Commerce Cloud</td>
<td></td>
</tr>
<tr>
<td>3. Field Service Lightning</td>
<td></td>
</tr>
<tr>
<td>Top three Salesforce solutions deployed in the past two years</td>
<td></td>
</tr>
<tr>
<td>1. Sales Cloud</td>
<td></td>
</tr>
<tr>
<td>2. Service Cloud</td>
<td></td>
</tr>
<tr>
<td>3. Community Cloud</td>
<td></td>
</tr>
<tr>
<td>Top three Salesforce solutions currently deploying</td>
<td></td>
</tr>
<tr>
<td>1. Service Cloud</td>
<td></td>
</tr>
<tr>
<td>2. Sales Cloud</td>
<td></td>
</tr>
<tr>
<td>3. Marketing and Commerce Cloud</td>
<td></td>
</tr>
</tbody>
</table>

* 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 | 1. Financial Services Cloud  
2. Marketing and Commerce Cloud  
3. CPQ Cloud |
|---------------------------------------------|------------------------------------------------|
| Other certifications or solutions mentioned  | 1. Platform Developer  
2. Einstein Analytics  
3. Financial Services Cloud  
4. Integration Cloud and Mulesoft |

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

Split of Salesforce services business by geography

North America and Latin America: 70%
UK and Continental Europe: 18%
APAC: 12%

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

- Single Country: 50%
- 1-3 Countries: 45%
- 3-5 Countries: 40%
- 5-10 Countries: 35%
- More than 10 Countries: 30%

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
- Cloudsense
- Apptus

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

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 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**
AppExchange and certifications

- **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

<table>
<thead>
<tr>
<th>Service providers (alphabetical order)</th>
<th>HFS point of view</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accenture</td>
<td>Biggest pool of certified Salesforce consultants with a focus on continuous innovation</td>
</tr>
<tr>
<td>Appirio</td>
<td>Business context understanding and industry sector solution development focus</td>
</tr>
<tr>
<td>Bluewolf</td>
<td>Breadth of services and business focus in a globally expanding practice</td>
</tr>
<tr>
<td>Capgemini</td>
<td>Positioning as a transformation partner with industry sector strength</td>
</tr>
<tr>
<td>Cognizant</td>
<td>Good growth, with strong investments and business transformation mindset</td>
</tr>
<tr>
<td>Deloitte</td>
<td>Digital focus with industry sector strength, developing business-centric solutions</td>
</tr>
<tr>
<td>Infosys</td>
<td>Strengthening capabilities and local presence, with industry sector focus</td>
</tr>
<tr>
<td>NTT DATA</td>
<td>Acquisitive service provider with a solution focus, global coverage capability, and industry sector expertise</td>
</tr>
<tr>
<td>PwC</td>
<td>Continued growth, business focus, and expanding geographic presence</td>
</tr>
<tr>
<td>TCS</td>
<td>Growth business with strong focus on industry sectors and innovation</td>
</tr>
<tr>
<td>Virtusa</td>
<td>Target industry sector focus in a fast-growth practice</td>
</tr>
</tbody>
</table>
Notable performances in HFS Salesforce services Top 10

<table>
<thead>
<tr>
<th>HFS Podium Winners</th>
<th>Top services providers across execution, innovation, and voice of the customer criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>#2</td>
</tr>
<tr>
<td><strong>accenture</strong></td>
<td><strong>Deloitte.</strong></td>
</tr>
<tr>
<td>Execution powerhouses</td>
<td>Innovation champions</td>
</tr>
<tr>
<td>Top 3 service providers on execution criteria</td>
<td>Top 3 service providers on innovation criteria</td>
</tr>
<tr>
<td>#1</td>
<td>#2</td>
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<tr>
<td><strong>accenture</strong></td>
<td><strong>Deloitte.</strong></td>
</tr>
<tr>
<td><strong>Capgemini</strong></td>
<td><strong>bluewolf</strong></td>
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<tr>
<td>#1</td>
<td>#2</td>
</tr>
<tr>
<td><strong>accenture</strong></td>
<td><strong>Deloitte.</strong></td>
</tr>
<tr>
<td><strong>virtusa</strong></td>
<td><strong>Cognizant</strong></td>
</tr>
<tr>
<td>Other notable performances</td>
<td></td>
</tr>
</tbody>
</table>
- **PwC** ranked #4 for overall innovation and #7 for overall execution
- **Bluewolf** ranked #4 for overall execution and overall innovation
- **TCS** ranked just outside the top five at #6 for voice of the customer
# HFS Top 10 Salesforce Services Rankings 2020

<table>
<thead>
<tr>
<th>Rank</th>
<th>Overall HFS Top 10 position</th>
<th>Breadth of services and delivery capability</th>
<th>Depth of services</th>
<th>Market and team experience</th>
<th>Overall execution</th>
<th>Vision for the development of Salesforce services</th>
<th>Positioning of the service provider in this market</th>
<th>Ability to drive long-term business value</th>
<th>Overall innovation</th>
<th>Voice of the customer</th>
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<tbody>
<tr>
<td>#1</td>
<td>accenture</td>
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<td>virtusa</td>
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<td>#3</td>
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<td>bluewolf</td>
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<td>virtusa</td>
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<td>#6</td>
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<td>Capgemini, pwc</td>
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<td>pwc</td>
<td>Cognizant</td>
<td>Cognizant</td>
<td>NTT DATA</td>
<td>NTT DATA</td>
<td>NTT DATA</td>
<td>Capgemini, pwc</td>
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<td>Infosys</td>
<td>Infosys, bluewolf</td>
<td>Infosys, bluewolf</td>
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</table>
Salesforce Services Provider Profile
Business context understanding and industry sector solution development focus

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>HFS Top 10 position</td>
<td>#4</td>
</tr>
<tr>
<td>Ability to execute</td>
<td>#5</td>
</tr>
<tr>
<td>Breadth of services and delivery capability</td>
<td>#5</td>
</tr>
<tr>
<td>Depth of services</td>
<td>#3</td>
</tr>
<tr>
<td>Market and team experience</td>
<td>#7</td>
</tr>
<tr>
<td>Innovation capability</td>
<td>#5</td>
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<tr>
<td>Vision for the development of offerings</td>
<td>#4</td>
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<tr>
<td>Positioning of the service provider in this market</td>
<td>#8</td>
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<tr>
<td>Ability to drive long-term business value</td>
<td>#9</td>
</tr>
<tr>
<td>Voice of the customer</td>
<td>#3</td>
</tr>
</tbody>
</table>

**Strengths**

- **Strong industry sector tool investment:** Appirio has a library of over 2,000 pre-built assets, including 11 Lightning Bolt solutions across multiple industry sectors. These include MarketPlace Onboarding for retail and Customer Onboarding for financial services. A new dedicated Product and Innovation (P&I) team develops new products, solutions, and accelerators to meet specific customer and industry needs. Its remit is two-fold. It develops products, such as its professional services product, Estimator, which are used by its implementation teams as well as sold as a subscription to clients. It will also continue to develop industry sector Lightning Bolt solutions. Appirio’s new Close The Experience Gap Framework and its accompanying Enterprise Capability Management (ECM) Tool is helping industry specific customers along their Salesforce experience journey to gain value realization on the platform.

- **Positioning Salesforce engagements in a business context:** Appirio’s Close the Experience Gap framework adopts a long-term business context view of a Salesforce deployment. It determines the user, operational and financial success of a deployment. One client said that Appirio has “a great understanding of the platform and its capabilities and how you can apply it to many facets of your business.”

- **Account management and flexibility:** Clients commend Appirio on the quality of its account management and flexibility. One client said that Appirio is “collaborative, receptive to adjusting as need be, and responding to any concerns that have arisen.”

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Rank</th>
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<tbody>
<tr>
<td>Number of projects completed</td>
<td>4,000</td>
</tr>
<tr>
<td>Certified technical architects:</td>
<td>1</td>
</tr>
<tr>
<td>Total number in practice:</td>
<td>2,200</td>
</tr>
<tr>
<td>Number of projects completed:</td>
<td>4,000</td>
</tr>
</tbody>
</table>

**Operations**

- **Partner level:** Appirio, Global Strategic; Wipro, Platinum
- **Salesforce Certified Consultants:** 2,000
- **Average number of certifications per employee:** 3
- **Certified technical architects:** 1
- **Total number in practice:** 2,200
- **Number of projects completed:** 4,000

**Key delivery locations for Salesforce practice:**

- India (50%+): Bangalore, Pune, Delhi NCR, Hyderabad, Chennai, Jaipur
- North America: US, Canada
- LATAM: Mexico, Brazil, Chile
- EMEA: UK, NL, IRL, CH, DE, FR, PT
- APAC: Australia, Japan, Philippines

**Acquisitions include:**

- Appirio (acquired by Wipro, 2016)
- Cellent (2016)
- HealthPlan Services (2016)
- 4C (2020)

**Partnerships include:**

- Salesforce, FinancialForce, Conga, Vlocity, Coveo, Xactly, nCino, Anaplan

**Industry coverage:**

- Manufacturing, technology, health and life sciences, banking and financial services, media and telecom, energy and utilities, retail and consumer goods, non-profit and education

- Publicly disclosed clients include:

**Close The Experience Gap Framework + Enterprise Capability Management (ECM) Tool**

- **Customer Onboarding:** Financial services
- **Nigel:** Cross-industry application
- **Marketplace Onboarding:** Retail
- **Higher Education Student Experience:** Higher education (for profit or non-profit)
- **Patient Care Management:** Healthcare and life sciences
- **Estimator:** Professional services
- **Appirio DX:** Cross-industry application
- **Franchise and Retail Communications:** Retail
- **Patient Onboarding:** Healthcare and life sciences
- **Higher Education Faculty Experience:** Higher education (for profit or non-profit)
- **Cloud Management Center (CMC):** Professional services
- **Connected Field Knowledge:** Energy and utilities
- **Employee Community:** Cross industry
- **Medicare Enrollment:** Healthcare and life sciences
About the author
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](mailto:))
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