

***ISG** Provider Lens™

Salesforce Ecosystem

USA 2019

Quadrant Report

A research report
comparing provider
strengths, challenges
and competitive
differentiators.

February 2019

Infosys®

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of February 2019, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

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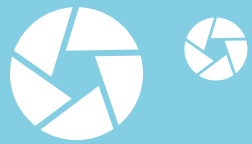
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EXECUTIVE SUMMARY

The Salesforce Ecosystem with Specific Focus on Sales and Service Cloud and Recommended Apps

Since the company was founded in 1999, Salesforce has shown a significant growth and is today the world's leading provider of cloud-based CRM functionality (SaaS). From the beginning, Salesforce has always focused on agile implementation and a high level of standardization, which in turn enables the company to issue frequent application updates. Furthermore, it helps clients to complete rapid implementations that can start with limited functional scope and then be enhanced over time. Meanwhile, the continuous development of the software has led to a variety of products being offered. The most mature are Sales Cloud (for supporting the main activities of salespeople) and Service Cloud (for supporting the main topics around customer service and the activities of the field service employees).

The growing functionality has led to a situation where implementations are increasingly being conducted on an enterprise level resulting in broader scope and major additional needs for integration into the client's respective system landscapes. A growing number of clients today are asking for consolidation of several Salesforce installations that have been deployed over the years in different organizational units. This implies that the availability of experienced implementation partners has become a critical success factor for the productive use of Salesforce.

The current situation in the market can be characterized as follows:

- In most cases, the client's functional requirements lead to so-called multi-cloud implementations including several of the Salesforce products. For example, in most cases a standard implementation is comprised of Sales Cloud and Service Cloud functionalities. Therefore, implementation partners need to be capable of supporting several, if not all, of the Salesforce products to be competitive. Hence, in general, the selections of providers that are relevant for the different segments and products usually does not strongly depend on the specific product being considered. The ability to work with multiple Salesforce products is important to provider positioning.
- The often rather complex system landscapes that a Salesforce implementation needs to be integrated into require a well-developed procedure model that considers the specific requirements. Many providers do offer a modified agile methodology that includes elements of a phased procedure model, particularly in the project scoping and definition phases and in the deployment phase. The core development parts of the respective project are still conducted in an agile mode with several sprints lasting only a few weeks each. A common term for this approach in the market is "hybrid agile" methodology.

- Two basic types of providers can be distinguished according to how they handle address integration needs in a complex environment:
 - There are providers that have a strong focus on system integration and offer, beside the Salesforce-related competency, capabilities regarding other technologies and/or software packages that also allow them to cover the integration aspects of a project. These providers tend to have global coverage and can serve clients with global operations.
 - There are providers that focus mainly upon Salesforce core functionalities, and in most cases also on a mainly agile approach to implementation. Projects that need significant integration with other packages will require respective knowledge on the clients' side, or the involvement of another provider with the needed competency. Typically, these "Salesforce only" providers have a limited size but are highly capable in their specific knowledge area due to their high specialization. They can serve all types of clients, but are best suited for projects with limited size and low integration needs, where most of the work required is in the U.S.

Besides assessing Salesforce consulting and implementation partners, this study reflects another major part of the Salesforce ecosystem, that of functional extensions of Salesforce products. As indicated above, Salesforce has a strong focus on standardization, and hence agile implementation opportunities, which on the other hand leads to some limitations in the functionalities that are provided. These limitations are compensated by a large network of independent software vendors (ISVs) within the ecosystem that provide a broad variety of apps that are based upon the Salesforce platform. Clients can use the ISV offerings to extend their respective installations with functionalities that go beyond the Salesforce standard. Salesforce explicitly supports this approach by providing an online application marketplace for third-party applications, called AppExchange. Applications that are offered on this marketplace are either available for free or require a separate contract with the ISV through yearly or monthly subscription models.

This report provides three lists of recommended apps (based on our research) that are offered on the AppExchange marketplace. One list is comprised of 20 apps that are suitable for a cross-industry use. The other two each have 10 apps each that are suitable for the healthcare and the manufacturing industries. The lists include a rating of each application based on the score we calculated from five basic criteria; however, the lists do not provide a ranking due to the very different scope and functional areas being offered.

Introduction

Simplified illustration



Source: ISG 2019

Definition

This study examines various offerings around the Salesforce platform for the U.S. market. It covers two distinct market segments.

On the one hand, it analyzes providers that act as implementation partners for Salesforce and offer services to design, configure and implement solutions for clients of the Salesforce platform. The focus of this study is on the Sales Cloud and the Service Cloud products within the Salesforce platform, as these are the most mature products within the company's portfolio. Because Salesforce has been growing significantly over the recent years, there is a huge demand for this type of implementation support, and for the maintenance of already existing implementations. Salesforce itself runs an implementation support organization of limited size and therefore maintains a network of partners to fulfill the needs

Definition (cont.)

of its clients. These partners are usually subject to certification by Salesforce, with a variety of certification levels, from Global Strategic at the top level to Silver as the lowest. Many Salesforce implementation partner operate on a global level, and hence, regional markets have a significant overlap of active providers.

On the other hand, the study gives consideration to the fact that the Salesforce ecosystem includes many independent software vendors (ISVs) that develop and offer applications that are based on the Salesforce platform, and that provide functional extensions and/or industry-specific additional functionality to this platform. These apps are made available on Salesforce's AppExchange store and require a separate contract between the client and the respective application provider. While implementation partners are evaluated based on standard Provider Lens methodology and categorized into quadrants, the application ISVs are presented based on a different approach due to their limited scope and their varying functionality. This report presents three separate lists of recommended apps that deserve special attention due to their specific functionality or their focus on a specific industry.

Definition (cont.)

Scope of the Report

Professional Services for the Salesforce Sales Cloud and Service Cloud

This segment addresses the providers of professional services for companies that use or intend to implement the Salesforce Sales Cloud and the Service Cloud, which are the most mature products in the Salesforce portfolio. These providers have naturally the same technological foundation and in most implementations of a Salesforce solution functionalities of both products are utilized. The Professional Services quadrant analysis includes the respective abilities of providers in consulting, configuration and implementation of a Sales Cloud application for the client and the go-live support. Integrating Salesforce into existing landscapes is usually also part of the respective projects.

The focus on the U.S. market means that the providers are offering their services to clients within the country. Nevertheless, for those clients that operate on a global level, the providers should be able to work on solutions supporting requirements with a global scope.

Salesforce Apps

This segment considers providers of apps that are based on the Salesforce platform and provide additional functionality. Criteria for consideration are functional breadth and depth of the applications, the provider's continuous maintenance and versioning, price model clarity, comprehensiveness of user support and customer satisfaction feedback. Since the functional differences between the numerous apps are too significant, there is no ranking presented in this study. Salesforce ISV evaluations are not presented in a quadrant because the functional differences of their software too significant. Instead, ISG identified 20 recommended independent applications for Salesforce that our research determined are suitable for clients in organizations across industries, plus 10 specific to the manufacturing vertical and 10 specific to healthcare. Assessments were made mainly based on publicly available information, however a few providers actively participated by submitting specific information.

The apps usually do not exhibit some kind of regional scope or limitation and can be used by clients across the globe.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

Market Challenger

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders”. Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising Stars are mostly product challengers with high future potential. When receiving the "Rising Star" award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the "Rising Star" has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Salesforce Ecosystem - Quadrant Provider Listing 1 of 1

	Professional Services for SF Sales & Service Cloud
Accenture	● Leader
Acumen	● Product Challenger
Appirio	● Leader
Atos	● Product Challenger
Birlasoft	● Rising Star
Bluewolf	● Leader
Capgemini	● Leader
Coastal Cloud	● Product Challenger
Cognizant	● Leader
Customertimes	● Product Challenger
Deloitte	● Leader
Fujitsu	● Market Challenger

	Professional Services for SF Sales & Service Cloud
Hexaware	● Product Challenger
Infosys	● Leader
LTI	● Product Challenger
Magnet360	● Leader
Nagarro	● Contender
NTT DATA	● Leader
Persistent	● Rising Star
PwC	● Leader
TCS	● Product Challenger
Tech Mahindra	● Contender
Traction on Demand	● Contender

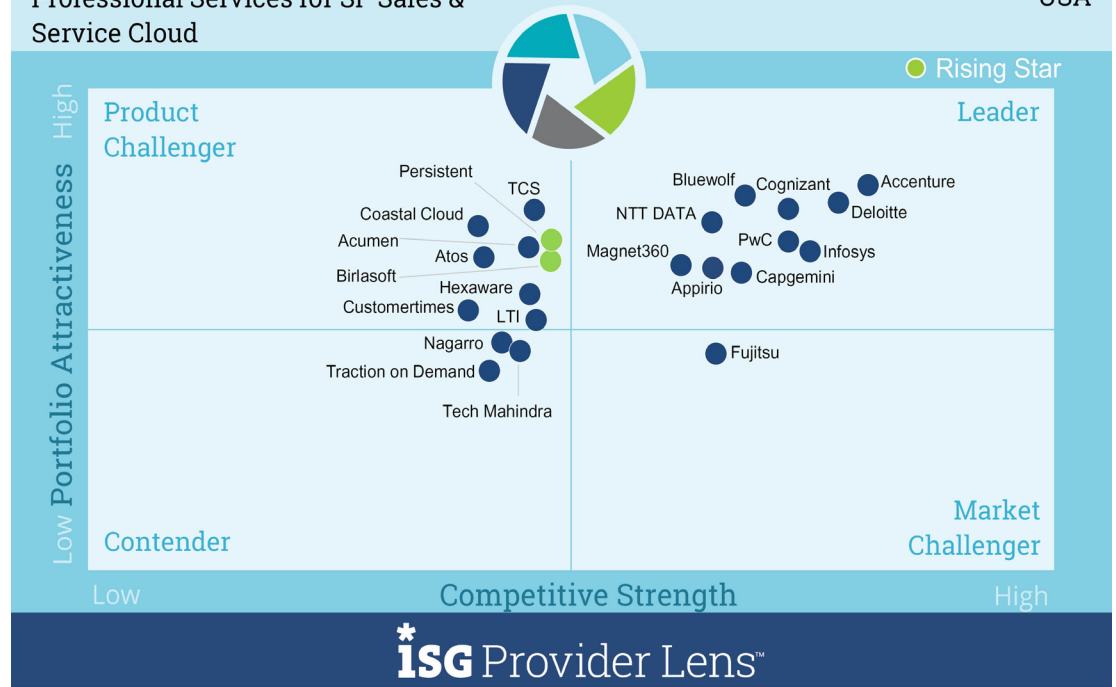
PROFESSIONAL SERVICES FOR SALES CLOUD AND SERVICE CLOUD

Definition

This segment addresses the providers of professional services for companies that use or intend to implement the Salesforce Sales Cloud or Service Cloud. The Professional services quadrant analysis includes the respective abilities in consulting, configuration and implementation of a Sales Cloud application for the client and the go-live support. The main professional services for applications that are already in production are maintenance and additional development. Integrating Salesforce into existing landscapes is usually also part of the respective projects and can be particularly challenging for providers when they serve enterprise clients because there are usually complex system landscapes to be considered.

Salesforce Ecosystem
Professional Services for SF Sales & Service Cloud

2019
USA



Source: ISG Research 2019

PROFESSIONAL SERVICES FOR SALES CLOUD AND SERVICE CLOUD

Definition (cont.)

The main functionalities of the Sales Cloud are:

- Contact Management
- Opportunity Management
- Lead Management
- Workflow and Approvals
- Sales Forecasting
- Email Integration
- Reports & Dashboards
- Salesforce Mobile

The main functionalities of the Service Cloud are:

- Customer Service
- Self Service
- Workflow and Approvals
- Digital Channels
- Field Service including Mobile
- Reports & Dashboards.

PROFESSIONAL SERVICES FOR SALES CLOUD AND SERVICE CLOUD

Definition (cont.)

MAIN RATING CRITERIA

The most important criteria that were used in the evaluation are as follows:

- Technological competency regarding Sales Cloud and Service Cloud
- Managed Services portfolio attractiveness
- Predefined solutions
- Unique capabilities and differentiators
- Execution capabilities / Workforce
- Broad client base.

Observations

Sales Cloud and the Service Cloud are the most mature products in the Salesforce portfolio, and the providers active in this market mostly have a proven record of respective implementations of those products. The current market has the following characteristics:

- Major differentiators among service providers are the so-called accelerators and the industry specific solutions they offer. These assets are used to make the best use of the agile implementation approach that is possible with the Salesforce type of SaaS application. To a large extent, the provider positioning in the segment reflects the accelerator and industry-specific solution elements of their respective portfolios.
- In general, it appears that many providers have a slightly stronger position in Sales Cloud than in other product segments, because it deals with the basics of the CRM functionality like CPQ (configure price quote), opportunity management and others. Service Cloud implementations can mainly cover two major areas.

PROFESSIONAL SERVICES FOR SALES CLOUD AND SERVICE CLOUD

Observations (cont.)

One is the functionalities that refer to the customer service as part of the sales process. Examples include contact center functionalities, customer portals and more. These functionalities are usually not isolated, but are used in combination with sales functionalities like CPQ, opportunity management and others. Most of the Service Cloud implementations fall into this category.

On the other hand, some cases require functionalities to support field service personnel in performing their tasks. These functionalities can for example refer to product specifications in case of repair services, or spare part supply management in case of device maintenance. Field support projects usually also have strong demand for mobile offline capabilities, to ensure continuous operation independent of network connections.

- As the U.S. is Salesforce's home market, there are naturally many providers offering professional services for Salesforce products. The globally acting providers have a dominant role. Reasons for their dominance include their ability to support broad scope including many of the Salesforce products, their better coverage of integration needs in sophisticated IT environments and the fact that many of the global providers are also supporting ongoing application management after Salesforce has been deployed. Midsize providers, in most cases, focus more on rapid implementation and on solutions for specific requirements, and less on integration and maintenance.

PROFESSIONAL SERVICES FOR SALES CLOUD AND SERVICE CLOUD

Observations (cont.)

The following providers have been identified as Leaders: Accenture, Appirio (a Wipro Company), Bluewolf (an IBM company), Capgemini, Cognizant, Deloitte, Infosys, Magnet360 (a Mindtree company), NTT DATA and PwC.

- Accenture operates in terms of the workforce one of the largest Salesforce implementation partner practices globally and can refer to a broad and long experience. The portfolio offers numerous predefined solutions that cover technical and project execution aspects as well as industry specifics.
- Appirio shows a rather strong Salesforce competency and a strong market position in the US. The tools used by Appirio help to manage projects very efficiently and to achieve convincing results. Since being acquired by Wipro the offering of combined services together with the parent company are continuously being developed.
- Bluewolf had already a strong position in the U.S. for a long time with

focus on rapid implementations and broad industry expertise. Since being acquired by IBM in 2016, the company is expanding its presence outside of the U.S. significantly and is a strong partner for Salesforce implementations serving clients with global operations.

- Capgemini is a globally operating provider of IT services that can refer to a rich experience with CRM in general and particularly with Salesforce. The functional expertise is complemented by a deep knowledge of industry specifics. The company offers a highly scalable and flexible delivery model most suitable specifically for large enterprise clients.
- Cognizant is a globally operating professional services provider with deep Salesforce related expertise and has developed a strong partnership with Salesforce over a longer period of time. The partnership includes, for example, provisioning support services on behalf of Salesforce as well as joint talent development. Cognizant has strong capabilities for various industries with a specific focus on healthcare.
- Deloitte has a large Salesforce practice operating on a global scale with the U.S. as the most important market. The portfolio offers numerous predefined solutions covering the improvements of efficiency in the project execution as well as industry specifics.

PROFESSIONAL SERVICES FOR SALES CLOUD AND SERVICE CLOUD

Observations (cont.)

- Infosys has within its global geographical scope a specific focus on the U.S. as key market. The portfolio offers a comprehensive development environment for Salesforce implementations as well as powerful industry solutions, namely for automotive and healthcare.
- Magnet360 is an implementation partner that has always been specialized on Salesforce implementations with a strong respective portfolio, including numerous powerful accelerators. Meanwhile, being part of Mindtree, there is now the ability to cover the integration with other packages as well.
- NTT DATA has a strong Salesforce related portfolio and provides a sophisticated delivery model with a relatively high share of nearshore resources. The portfolio covers productivity-oriented solutions as well as industry specific functionalities and the company can refer to a rich experience regarding Salesforce implementations. The U.S. is a key market for NTT Data.

- PwC has a strong Salesforce related portfolio with a specific focus on combining the business process transformation and the technology being used for this transformation. The company offers several industry specific solutions with Healthcare being a focus area.

Birlasoft and Persistent have achieved Rising Star status in the market.

- Birlasoft has been focused on Salesforce for a long time. Since the company has merged with KPIT, there will be the opportunity to enhance its scope significantly, as this new formation will enable the company to better expand coverage for integration needs and application management offerings.
- Persistent has a rather unique focus with its utilization Salesforce as an integration platform for a data-oriented system landscape. In addition to that, Persistent offers powerful accelerators and rich industry expertise.

INFOSYS

Overview

Infosys provides consulting and technology services globally. In recent years, it has focused its portfolio on digital transformation for clients' core business processes. The services offered include CX consulting, UX strategy definition, architecture definition, agile implementations, global rollout execution, ecosystem integration, platform-based application modernization and support services. Infosys has deployment experience across various industry verticals and additional expertise with numerous ISV solution offerings that are based on the Salesforce platform.

Strengths

Delivery model formula: Infosys operates a global delivery organization with several delivery centers in the U.S. and totals more than 3,000 Salesforce-dedicated resources. Its global delivery mix of onshore and offshore resources contributes to cost efficient project execution. Infosys achieved strong growth in Salesforce-related market segments in recent years. The company has an outstanding customer satisfaction rating.

Deployment automation: With its Agile Pro – Smart Development Platform, Infosys provides a comprehensive implementation environment with several automated steps (for example, Health Check, Continuous Deployment and others) that help to increase efficiency and speed in Salesforce implementation projects. Infosys has a focus on legacy to Salesforce migration to help clients achieve application rationalization and modernization of various platforms to integrate with the Salesforce platform. Another powerful tool in this context is the Sandbox Manager, which supports the parallel management of several Salesforce instances.

Industry offerings: Infosys has powerful industry solutions, namely for automotive and healthcare. The company covers Salesforce-based solution integrations into complex IT environments with its respective standardized solution packages. For Sales Cloud, Infosys' preconfigured template for cross industry use is a remarkable offering. In the Service Cloud context, Infosys offers several powerful solutions, for example Smart Field Manager - a field service platform (Connected Devices, Mobile Experience, Field Service automation) and HR Case Management.

Caution

Infosys has a strong offshore workforce but needs to expand its U.S. onshore resources to cover the numerous projects. Infosys has been scaling up Salesforce capabilities locally in the US (Indianapolis, Richardson and Hatford).

Infosys has a strong focus on technology and tools, but its business process transformation capability should be strengthened.



2019 ISG Provider Lens™ Leader

Infosys has built a strong Salesforce practice with powerful industry solutions and productivity tools.



AppExchange Salesforce Ecosystem

Recommended Salesforce Apps Published on the AppExchange Store

Definition and Observations

Salesforce has a strong focus on standardization and hence agile implementation opportunities, which has advantages but leads to some limitations in the functionalities being provided. The limitations are compensated by a large network of independent software vendors within the Salesforce ecosystem that provide a broad variety of apps that are based on the Salesforce platform.

- These apps can be used by clients to extend their respective installations by functionalities that go beyond the standard Salesforce offerings.
- Salesforce explicitly supports this approach by providing an online marketplace for third-party applications called AppExchange. The apps published on the AppExchange store are subject to approval by Salesforce.
- Applications that are offered on AppExchange are either available free or require a separate contract with the ISV, through yearly or monthly subscription models. Salesforce requires ISVs to continuously and document their applications on the store. Customer satisfaction feedback is collected and published on AppExchange.

The following sections present three lists of apps on AppExchange that are recommended because the analysis taken in this study found they appear to be most promising for specific purposes.

- The first section covers applications that are suitable for a cross-industry use. The typical functionalities that are provided in this group of apps are CPQ (configure, price, quote), document management and some features that meet technical requirements, such as individual backup capabilities.
- The subsequent sections each list show 10 apps that are suitable for use in the healthcare and the manufacturing industries, respectively.

Recommended Salesforce Apps Published on the AppExchange Store

Definition and Observations (cont.)

- Typical functionalities that are provided for healthcare include compliance with specific regulations like ISO certifications or various good practices (GxP) or meet specialized functionality needs for a specific market segment, for example, medical device companies.
- Software for the manufacturing industry typically includes various levels of ERP functionalities beyond the sales processes that are covered in standard Salesforce. Some of these ERP functions extend across the entire supply chain, others focus on very specific activities like transportation management.

The lists come include a rating of the particular apps based on a set of five basic criteria, but do not represent a ranking because of the very different scope and functional areas being offered. Providers are listed in alphabetical order.



List of Recommended Apps for Cross-Industry Use

Introduction

The apps for cross-industry use consist mainly of three groups:

- There are apps that enhance core functionalities of the Salesforce Sales Cloud and Service Cloud. For example, several of these apps provide more sophisticated versions of the configure, price, quote (CPQ) functionality that basically supports the process from receiving a customer request to providing a quote.
- There are apps that add functionalities to Salesforce where the core functionality does not sufficiently support the respective business process. For example, there are several apps for document generation and document management in general, or for specific documents like contracts.
- There are several utilities, such as to enable extended search or a user-defined backup.



Fig 1 Top 20 Apps for Salesforce Customers in the Cross-Industry 1 of 7

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Apttus CPQ	●	●	●	●	●	Apttus CPQ is a full configure, price, quote solution and is part of a complete suite on a common platform that is built native on Salesforce. It uses machine learning capabilities for getting data-driven insights, for example, optimal price based on deal characteristics, history and margin analysis. Standard pricing is per user and month. The latest release was published in January 2010, according to the description on AppExchange.
Apttus Contract Management	●	●	●	●	●	Apttus Contract Management is a solution serving the full contract lifecycle and primarily meets the needs of legal, procurement and IT organizations, but is also suitable for finance and sales. The main focus beside increasing efficiency is ensuring users follow mandatory and optional obligations through the process. It is part of a complete suite on a common platform that is built native on Salesforce. Standard pricing is per user and per month. The latest release was published in November 2012, according to the description on AppExchange.
Bullhorn for Salesforce	●	●	●	●	●	Bullhorn Staffing & Recruiting addresses staffing and recruiting processes, primarily for respective recruiting firms, but also suitable for enterprise HR departments. The functionalities include the core recruiting process, maintaining communities, conducting recruiting operations, accounting integration and specific analytics. Standard pricing is per user/per month. The latest release was published in December 2012, according to the description on AppExchange.

Fig 1 Top 20 Apps for Salesforce Customers in the Cross-Industry 2 of 7

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Conga Composer Document Generation	●	●	●	●	●	Conga Composer is a solution for efficiently creating templates and documents using any standard or custom Salesforce object and with external data sources or systems where required. Conga Composer supports building processes and procedures into Salesforce for automated document generation. Standard pricing is per user/per month. The latest release was published in February 2019.
Coveo	●	●	●	●	●	Coveo provides an AI-powered search for the Service, Sales, Community and App Clouds. The out-of-the-box machine learning function analyzes and then optimizes the search experience based on successful outcomes so that future users find what they need faster. The embedded analytics helps to identify content gaps, understand user behavior and measure KPIs like case deflection. The latest release was published in February 2019.
Customertimes CT Mobile & CT Presenter	●	●	●	●	●	The Customertimes solution consists of two main modules: Salesforce Offline and the Digital Sales Aid. It provides full offline capabilities for all Salesforce objects and a broad range of field service support functions, including interactive presentations, dashboards and more. It facilitates call planning, shelf audit, order taking, and other activity. The latest release was published in February 2019.

Fig 1 Top 20 Apps for Salesforce Customers in the Cross-Industry 3 of 7

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Docomotion Document Management	●	●	●	●	●	Docomotion provides automated document generation and management functionality suitable for generating quotes, invoices, proposals and contracts with data merged from any object in PDF, Word, HTML5 and emails, all with e-Signature. It supports Salesforce Process Builder to maintain standard processes and procedures thereby increasing efficiency. The standard pricing is per user and month. The latest release was published in November 2018.
DocuSign eSignature	●	●	●	●	●	The DocuSign app is the leading eSignature solution for integrated use on the Salesforce platform. It meets the most relevant security industry certification standards and claims to use the strongest commercially available data encryption technologies. It can be used in with all Salesforce cloud solutions and is fully mobile enabled for any device. The standard pricing is per user and month. The latest release was published in October 2018.
Form Assembly	●	●	●	●	●	The solution provided by FormAssembly helps to generate any kind of forms, collect data by the forms and to relate these data to processes. The goal is to increase process efficiency by this functionality. The latest release was published in May 2018.

Fig 1 Top 20 Apps for Salesforce Customers in the Cross-Industry 4 of 7

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Gainsight Customer Insight	●	●	●	●	●	Gainsight provides a platform for gathering and managing numerous customer-related data like workflows, customer communications, satisfaction surveys and business related data. It supports an active management of the customer relation along the entire lifecycle. The latest release was published in February 2019.
Geopointe	●	●	●	●	●	Geopointe is a powerful mapping and territory management solution with full Salesforce integration. It includes route planning and optimization plus analytics to optimize assignments on the basis of key business data. It is naturally fully mobile enabled and applicable globally. The latest release was published in January 2019.
Inspire Planner	●	●	●	●	●	Inspire Planner is a complete and native Salesforce project management solution. It can be used for projects of any size and is hence a good match for professional services organizations. Additional features include optimizing project management and collaboration by sharing projects with external team members. The latest release was published in May 2018.

Fig 1 Top 20 Apps for Salesforce Customers in the Cross-Industry 5 of 7

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Kimble Professional Services Automation	●	●	●	●	●	The Kimble solution provides the most relevant functionalities for professional service management like revenue forecasting and recognition, resource planning, project management, budget and margin control, T&E and billing. It includes built-in diagnostics and intelligence to guide users. It is easy to implement, does not require major configuration and provides relevant external integration. The latest release was published in October 2018.
Mapanything	●	●	●	●	●	Mapanything is a powerful mapping and territory management and optimization solution with full Salesforce integration. Route planning and optimization, analytics and field force management, including capacity planning, are substantial features. It is naturally fully mobile enabled and applicable globally. The latest release was published in November 2018.
New Voice Media Contact Center	●	●	●	●	●	New Voice Media Contact Center is a powerful call center solution providing Salesforce telephony integration including CTI, IVR, ACD, click-to-dial, auto dialing, call recording and call routing. It automatically displays key customer data within Salesforce Sales and Service Cloud. It is used in more than 60 countries. The latest release was published in November 2018.

Fig 1 Top 20 Apps for Salesforce Customers in the Cross-Industry 6 of 7

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Nice InContact Contact Center	●	●	●	●	●	Nice InContact Contact Center is an easy-to-install call center solution with focus on increasing agent efficiency while simultaneously improving customer experience. It automatically displays key customer data within the Salesforce Sales and Service Cloud synchronized with every customer interaction routed to the agent. It is applicable globally in more than 150 countries. The latest release was published in January 2019.
Nintex DocGen Document Generation	●	●	●	●	●	This Nintex app is a comprehensive solution for creating documents like contracts, invoices, RFPs and more on the basis of the usual business data. It is basically a drag-and-drop designer interface that makes it easy for people without coding experience to build automated solutions for existing manual document creation tasks. The latest release was published in February 2019.
Own Backup	●	●	●	●	●	OwnBackup provides automated and daily backups, mechanisms for comparing, and restoring, disaster recovery, sandbox seeding and replication, secure key management and more. It is very valuable for situations where user-inflicted data loss may occur and potentially result in significant damage. It helps to comply with enterprise security requirements, including GDPR aspects. The latest release was published in Septemebr 2018.

Fig 1 Top 20 Apps for Salesforce Customers in the Cross-Industry 7 of 7

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Service Max Field Service	●	●	●	●	●	ServiceMax Field Service is a leading service management platform that is also available as native Salesforce app. It provides a complete set of field service business processes, including work order management, entitlements, pricing and invoicing. Additional features are Connected Field Service (with IoT support), Scheduling Optimization and Service Performance Metrics. The latest release was published in August 2013.
Trackwise Complaint Management	●	●	●	●	n.a.	This TrackWise app provides a comprehensive solution for quality and regulatory professionals to manage the entire complaint lifecycle—from complaint to investigation, root cause analysis and regulatory reporting. It satisfies internal and external compliance requirements including 21 CFR Part 11 and includes also electronic signature and audit trail. The latest release was published in November 2015.

List of Recommended Apps for Healthcare Organizations

Introduction

The recommended apps for healthcare organizations mostly focus on the quality and compliance aspects that are essential for healthcare but are not supported sufficiently by standard Salesforce functionality. Other offerings support specific functions like clinic management, laboratory management or the sales and customer service processes specific to medical devices companies.



Fig 2 Top 10 Apps for Salesforce Customers in the Healthcare Organizations 1 of 4

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Cognizant Med Vantage	●	●	●	●	n.a.	Cognizant provides with this app a comprehensive and integrated after- market complaint handling and field service solution for the medical device industry. The core functionalities include end-to-end service management and technician allocation plus work order, warranty and entitlement management. The solution is validated and GxP compliant. The latest release was published in November 2018.
Compliance Quest Quality Management	●	●	●	●	●	CQ Quality Management provides a full suite of quality management functionalities built on the Salesforce.com platform. It facilitates managing regulatory and compliance requirements on an enterprise level (EQMS) and incorporates numerous industry best practices. It is fully compliant with all relevant regulations like ISO certifications, GxP compliance and the regulatory compliance to 21CFR Part 11/Audit Trails and Electronic Signatures. While providing powerful functionality, it is still rather easy configure and administer. The latest release was published in March 2018.
Customertimes CT Pharma	●	●	●	●	●	CustomerTimes CT Pharma provides a full sales force automation solution specifically for the pharmaceutical industry built on the Salesforce platform. The app includes a 360-degree view on the customer, cycle planning, promo management, call &and visit planning and various reporting functions. It offers a full offline capability which is crucial for the use in the field service. The latest release was published in May 2018.

Fig 2 Top 10 Apps for Salesforce Customers in the Healthcare Organizations 2 of 4

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Dot Compliance Suite	●	●	●	●	●	Dot Compliance Suite is a solution that simplifies and improves compliance management efficiency of quality for highly regulated industries. The solution is fully compliant with the FDA regulation 21 CFR Part 11 for validating electronic records. It is based upon numerous best practices and supports functionalities like life cycle management, electronic signatures, full audit trail history and record retention. The latest release was published in October 2018.
"Optrascan CloudPath LIMS"	●	●	●	●	●	The app provides a cloud-based laboratory information management system (LIMS) on the basis of Salesforce technology. It facilitates easy-to-implement complete workflow optimization with focus on clinical sample management. The latest release was published in May 2017.
Osler Technology Clinical Performance Platform	●	●	●	n.a.	●	This app provides a standardised framework for clinical managers to assess, certify, validate and benchmark clinical procedures and workplace assessments, to better understand the competency of their teams, and extend their scope of practice. Hence, it is a tool for continuous improvement by applying a quality assurance cycle tailored to an individual practitioner's capability and experience. The latest release was published in January 2016.

Fig 2 Top 10 Apps for Salesforce Customers in the Healthcare Organizations 3 of 4

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Riskconnect GRC	●	●	●	n.a.	●	Riskconnect provides an enterprise-wide GRC platform that supports risk, governance and compliance functions, internal audit, vendor management and policy management. The app helps to manage risks that could prevent an organization from achieving its objectives based on real-time, enterprise-wide, comprehensive risk information. It has the flexibility to adapt any framework such as ISO31000, COSO ERM, etc. The latest release was published in July 2012, according to the description on AppExchange.
Veeva	●	●	●	●	●	Veeva provides a multichannel CRM for the life sciences industry that was built on the Salesforce platform and is suitable for globally operating companies. Functionalities include Orchestrated Multichannel Engagement and Team Based Selling and the solution is fully compliant with all relevant regulations, such as ISO and GxP certifications.
Vlocity Health	●	●	●	n.a.	●	Vlocity Health is a health insurance solution that provides numerous digital front- and middle-office capabilities across business functions and lines of business. It is natively integrated into Salesforce. The functions include product configuration, quoting, underwriting, enrollment, onboarding, customer support and renewal processes connected to health plans. The latest release was published in December 2015.

Fig 2 Top 10 Apps for Salesforce Customers in the Healthcare Organizations 4 of 4

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Trackwise Quality Management	●	●	●	n.a.	n.a.	TrackWise Digital is an end-to-end quality and compliance solution offering industry best practices in a simple, easy-to-use system that can be implemented quickly and accessed on any device. The app facilitates to manage internal, external and regulatory audits, and initiating planned or unplanned deviations. Automated validation help teams to proactively manage compliance. The latest release was published in August 2018.

List of Recommended Apps for Manufacturing Companies

Introduction

The recommended apps for manufacturing companies are mostly targeting on enhancing Salesforce's mainly sales oriented functionality with basic, or in some cases even enhanced, ERP capabilities. Processes like order management, inventory management or shipping are supported by several apps. Very specific functions like supporting compliance with global trade regulations or supply chain management can also be found.



Fig 3 Top 10 Apps for Salesforce Customers in the Manufacturing Companies 1 of 4

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Accounting Seed	●	●	●	●	●	This app provides a native Salesforce solution for general ledger, billing and cash receipts, accounts payable and cash disbursements, budgeting and project accounting. Payment processing is supported by a connection to more than 14,500 banks and credit card companies. It also supports some basic ERP functionalities like order management and inventory. The latest release was published in January 2019.
AscentERP	●	●	●	●	●	AscentERP is a native ERP solution built on the Salesforce platform. It supports warehouse management, inventory management, manufacturing, sales order, purchase order and shipping. Additional features that specifically help the physical movements of goods include support for RFID, wireless bar code scanning, bar code label printing and more. The latest release was published in November 2017.
CloudSense CPQ	●	●	●	n.a.	●	The Cloud Sense app is a comprehensive CPQ solution with a full quote-to-cash lifecycle from omnichannel CPQ through to billing. In contrast to several other CPG packages, the app also incorporates the order management functionality. Some e-commerce functionalities are supported, like intelligent shopping carts and mobile access for several functions mobile access. The latest release was published in January 2012.

Fig 3 Top 10 Apps for Salesforce Customers in the Manufacturing Companies 2 of 4

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Fujitsu GLOVIA	●	●	●	●	●	With the GLOVIA package, Fujitsu provides a powerful and fully customizable order management solution built on the Salesforce platform. Main functions are order management and fulfillment, invoicing, inventory management, MRP and work order management. The solution includes the interfaces to corresponding accounting solutions. The latest release was published in January 2019.
Legendary Supply Chain	●	●	●	n.a.	●	This app is primarily focused on the sourcing related aspects of the supply chain like tracking market prices for products and materials, tracking requests for purchases, including fulfillment time, and warehouse and inventory management. It fits best for service companies and the related parts management. The latest release was published in November 2016.
Neurored Cloud SCM & TMS	●	●	●	n.a.	●	This app targets specifically traders and freight forwarders that are significantly involved in global trade. The main functionalities are supplier relationship management, import/export pricing, global trade management that considers custom duties, warehouse management and transportation management. Latest technologies like RFID, IoT and others can be utilized. The latest release was published in July 2014.

Fig 3 Top 10 Apps for Salesforce Customers in the Manufacturing Companies 3 of 4

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
Rootstock Cloud ERP	●	●	●	●	●	The Rootstock ERP solution is a comprehensive package providing the entire stack of ERP functionalities on the Salesforce platform. Functionalities include material requirements planning (MRP), lot and serial control, shop floor control, inventory control and many more. Mobile functions facilitating automation for inventory, production, shipping, fulfillment and labor transactions are available on any mobile device. The latest release was published in June 2017.
Commercient ERP Sync	●	●	●	●	●	This app is a bidirectional sync solution for connecting Salesforce with many standard ERP systems. Objects that can be synced are customers, contacts, invoices, sales orders, payments, products, pricing, inventory, BOMs, serials, assets, warranties, AP and more. The data integration keeps changes made to the ERP and CRM system up-to-date simultaneously. The solution is suited for clients that keep their ERP system separate from Salesforce. The latest release was published in December 2018.
Streamline ERP	●	●	●	n.a.	●	The Streamline app provides a variety of features mainly for brokers, agents and global shippers. Functions like transport management, shipment management and vehicle track and trace are the specific focus. Other standard functions like order management and invoice management are also included. The latest release was published in June 2014.

Fig 3 Top 10 Apps for Salesforce Customers in the Manufacturing Companies 4 of 4

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

App	Functionality	Maintenance & Updates	Price Model	Service & Support	User Reviews	Short Description
ZenKraft Multi Carrier Shipping	●	●	●	●	●	This app provides enhanced shipping functionality inside Salesforce for more than 30 shipping carriers such as FedEx, UPS, DHL, Canada Post, TNT and DPD. Core functionalities include document generation and package shipment, rate calculation and comparison, label generation and printing on leading thermal printers, automatic shipment tracking and more. The latest release was published in March 2019.

METHODOLOGY

The ISG Provider Lens™ 2019 – Salesforce Ecosystem research study analyses the relevant software vendors and service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Salesforce Ecosystem market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements



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Mr. Suletzki relies on a deep understanding of core business processes and in-depth know-how of IT management. He has more than 30 years of experience as Senior IT Manager, Senior Project Manager and – at the beginning of his career – as IT consultant. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution

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