IDC MarketScape

IDC MarketScape: Worldwide Salesforce Implementation Services 2019 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE

IDC MARKETSCAPE FIGURE

IDC MarketScape Worldwide Salesforce Implementation Services Vendor Assessment

Source: IDC, 2019

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: Worldwide Salesforce Implementation Services 2019 Vendor Assessment (Doc # US45007219). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study represents a vendor assessment of the 2019 Salesforce implementation services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor’s success in the marketplace and help anticipate the vendor’s ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide Salesforce implementation services market. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing Salesforce implementation services in both the short term and the long term.

A component of this evaluation is the inclusion of the perceptions of Salesforce implementation services’ buyers of both the key characteristics and the capabilities of the vendors evaluated. Buyers were surveyed across all three of IDC's macroregions. Key findings from the evaluation include the following:

- Across all 34 strategies and capabilities assessed, 3 strategies where collectively vendors did the best across all Salesforce implementation service providers are "portfolio strategy," "employee strategy," and "sales/distribution strategy." Likewise, 3 capabilities where collectively vendors were rated the highest on average by customers are "functionality/offering delivered," "cost competitiveness," and "customer service delivery."
- Based on IDC'sGlobal Salesforce Implementation Services Buyer Perception Survey feedback from 77 of the evaluated vendors' customers, the most critical business priority for them was to "strengthen and expand customer experiences and relationships," while the most critical vendor attribute for successful Salesforce implementation services was being "able to achieve desired business outcomes."
- Business remains the dominant sponsors of Salesforce implementation services projects, with 56.2% of projects being sponsored by business buyers. However, CIOs/CTOs are the largest key sponsor for Salesforce implementation services with 24% share.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Participation was mandatory for vendors listed as Global Strategic Partners in the Salesforce AppExchange as of April 1, 2019. Also invited were Salesforce consulting partners that had at least 200 Salesforce-certified professionals as of April 1, 2019.

Note: While both Bluewolf and Appirio appear as Global Strategic Partners on the Salesforce AppExchange, their evaluations were combined with those of IBM and Wipro, respectively.
ADVICE FOR TECHNOLOGY BUYERS

▪ **Salesforce center of excellence.** As Salesforce keeps adding more areas to its traditional CRM cloud portfolio, it is important to have a top-down approach when it comes to adopting Salesforce solutions. A more integrated approach that offers elements such as centralized resourcing; shared planning and designing; product, services vendor, and tools selection; and knowledge sharing will allow more efficient and cost-effective rollouts of various Salesforce solutions within your enterprise.

▪ **Data-driven enterprise.** Become a data-driven enterprise by harnessing analytics and AI solutions. Salesforce is increasingly embedding Einstein across its key products, and organizations can utilize analytics and AI technologies on their business, customer, application, and systems data to drive more data-driven and actionable decisions.

▪ **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list 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.

VENDOR SUMMARY 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 the vendor's strengths and challenges.

**Accenture**

According to IDC analysis and buyer perception, Accenture is positioned in the Leaders category in the 2019 IDC MarketScape for Salesforce implementation services worldwide.

Accenture is focused on leading in the "new," which it defines as digital, cloud, and security-related services, underpinned by new and innovative technology. As one of Salesforce's global strategic partner for over a decade, the Accenture Salesforce Business Group brings together deep expertise across all of Accenture’s businesses – Consulting, Strategy, Digital, Technology, and Operations – to deliver transformation for the company's clients. Accenture has deep relationships throughout the Salesforce ecosystem, and with over 16,500 Salesforce-skilled professionals, Accenture has one of the world's largest global Salesforce practice.

**Strengths**

Buyers rate Accenture highly for providing appropriate and high-quality resources for a project and for its ability to provide customer service, particularly onsite. Similarly, IDC views Accenture highly in terms of its growth strategy and its innovation/R&D strategy.

**Challenges**

IDC believes that Accenture's delivery model strategy could be improved by increased use of data-based applied research to improve delivery processes. Also, Accenture would benefit from making its Salesforce practice more prominent on the corporate website.
Consider Accenture When

Organizations should consider Accenture when they are looking for end-to-end digital transformation solutions that not only include experience in strategy and design but also the enablement of a Salesforce solution. Accenture should also be on the short list when users are seeking tight project management including flexibility in handling changes in project scopes.

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 go-to-market 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 experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort 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, 2019 (IDC #US44916019, March 2019).
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Synopsis

This IDC study represents a vendor assessment of the Salesforce implementation services through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the Salesforce implementation integration services market. This IDC MarketScape covers a variety of vendors participating in the Salesforce implementation services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"As Salesforce keeps adding new solutions to its portfolio, the implementation of Salesforce-based cloud solutions is becoming ever more complex. This and the top buyer priority of being able to achieve desired business outcomes indicate that the successful services vendors in the Salesforce implementation ecosystem must possess solid industry/business process knowledge along with wide-ranging technical expertise," says Ali Zaidi, research director, IT Consulting and Systems Integration Business Strategies at IDC.
About IDC

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