ISG Provider Lens®

Salesforce Ecosystem Partners

Value Realization and Optimization Services

A research report comparing strengths and advantages of Salesforce partners

Customized report courtesy of:

HEXAWARE

QUADRANT REPORT | APRIL 2026 | U.K.

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Salesforce transformation in UK accelerates as data readiness, AI control and delivery models converge

This ISG Provider Lens® Salesforce Ecosystem Partners study evaluates the competitive landscape of Salesforce providers in the UK in 2026. The research covers the following quadrants: Professional Services, Value Realization and Optimization Services and Innovation on Salesforce/Agentforce. It assesses provider capabilities, market positioning and execution across advisory, implementation and managed services within the defined scope of the study.

Market context

Enterprises in the UK are advancing Salesforce-led modernisation under stringent data protection and AI governance expectations. The market's pivot towards Agentforce 360 and Data 360 reflects the demand for intelligent, cross cloud workflows and safe automation. The regional operating environment is shaped by local data residency expectations, public sector assurance standards and sector oversight in financial services and utilities, which require auditable decisions and human in the loop controls for AI.

Salesforce adoption is expanding beyond core sales and services into omnichannel engagement, contact centre automation and industry clouds. However, architectural complexity grows with MuleSoft mediated integration with ERP, HR and legacy estates, making platform resilience and change discipline critical. Moreover, the UK's economy and ongoing skills constraints are driving industrialised delivery models, managed services and accelerators that compress cycle times while preserving compliance.

Macroeconomically, enterprises are prioritising ROI, shifting their budgets from net new build to modernisation and optimisation. This aligns well with Salesforce's triannual release cadence, pushing organisations towards evergreen architectures, DevSecOps tooling and AgentOps for runtime observability. Over the last 12-18 months, the Salesforce ecosystem has

UK leadership is shifting towards **AI-governed**, Data 360-grounded **delivery**, proving value at scale.

transitioned from AI experimentation towards agentic architectures that embed Data Cloud, Einstein and Agentforce 360 into front- and back-office workflows. However, this trend has yet to fully materialise in the UK as adoption is constrained by governance, safety and auditability requirements. Therefore, providers and enterprises must balance speed with risk controls, data residency and sector-specific compliance (e.g., the consumer duty in financial services, National Health Service [NHS] information governance and the UK GDPR). Buyers are ready to scale agentic AI, but only with transparent governance (Trust Layer), explainability and measurable outcomes. This report identifies and assesses partners that convert AI and data capabilities into operational value in line with UK regulatory expectations, across consulting, build and run services.

Enterprise priorities

Buyers in the UK are responding to the abovementioned macroeconomic conditions by prioritising control, value proof and scale. Enterprise programmes are emphasising outcomes over experimentation and insisting on guardrail-first agent design, data-grounded personalisation and release safe change. Buyers seek the following:

- Auditability and trust: Lifecycle controls such as policy guardrails, model selection via the Trust Layer, decision logs and human approval checkpoints embedded in agent workflows.
- FinOps tied to business KPIs: Cost-to-value telemetry that links licence consumption, storage and API usage, and AI credits to CX, revenue, case resolution and time-to-market metrics.
- Integration and data readiness: Data 360 unification, semantic modelling and MuleSoft-led orchestration must produce single-source-of-truth views without degrading performance.
- Evergreen operations with AgentOps: Runtime observability, automated remediation and DevSecOps practices must keep pace with triannual releases and avoid regression.

UK nuances were clear while evaluating buyer behaviour. Regulated sectors (such as financial services, public sector and utilities) demand region-specific compliance narratives, clarity on data residency and explainable AI. Buyers expect referenceable UK use cases, quantified outcomes and AppExchange backed evidence before scaling agentic AI. They prefer architectural maturity (in terms of CTA involvement and design authority governance) over generic scale metrics. Also, mid to large enterprises leaned more towards modular roadmaps with QuickStarts that embed into enterprise patterns rather than monolithic waves. Pricing models also trend towards outcome-linked pricing in optimisation engagements, though many buyers still prefer the time-and-materials (T&M) model for complex transformations.

Provider Dynamics

Professional Services

Providers leading in the UK Professional Services quadrant anchor their programmes in Agentforce 360 roadmaps and governance-first design. They use design authorities to standardise cross-cloud patterns, enforce integration principles and sequence deployments to derisk cutover. A few of their approaches include reusable accelerators, reference architectures and industry blueprints that embed AI GRC from discovery to operations. Leading teams pair business process architecture with organisational change management (OCM) to promote adoption and target measurable reductions in effort and cost. Relevant proof artefacts include UK referenceable outcomes, governance playbooks, Data 360 semantic models and change and readiness plans aligned to triannual releases. A few common gaps in this area include underweight architectural leadership (CTA scarcity) and insufficient UK specific compliance evidence on AppExchange.

Value Realisation and Optimization Services

Managed services leaders convert *run* into a KPI aligned optimisation engine. They implement AgentOps to monitor agent workflows and platform health, then automate remediation under policy controls. They also integrate FinOps with dashboards that correlate consumption to business value, enabling right sizing and licence rationalisation. Operating models combine Modern Ops and modern engineering, including CI/CD pipelines, automated testing and release orchestration, which keep estates evergreen. Buyers in the UK expect SLAs tied to experience metrics, such as resolution time and personalisation effectiveness, not just availability. Providers that remain break fix or rely solely on T&M struggle to demonstrate ROI. Differentiated teams demonstrate Data Cloud hygiene, runtime observability and embedded OCM that drive sustained adoption.

Innovation on Salesforce/Agentforce

Leaders in this space operationalise autonomous agents safely. They demonstrate custom agents built with Agentforce Builder and Agent Script, grounded by intelligent context and policy guardrails via the Trust Layer. Multi-agent workflows span Customer 360 Apps, Slack and Voice, with KPIs such as case deflection, average handling time (AHT) reduction and seller guidance accuracy. Leading providers show strong governance capabilities across explainable decisions, model choice and human escalation paths. Their delivery mechanisms are agile PoVs that complement certified solutions and are supported by DevSecOps and secure multichannel deployment. Leading providers showcase evidence of industry agents with UK references, data-grounded orchestration patterns and runtime insights that prove stability and compliance under local conditions. Laggards present demonstrations without data readiness or fail to connect AI consumption economics to outcomes.

Outlook

Over the next 12-24 months, Salesforce leadership in the UK will be defined by the ability to industrialise AI-led transformation with auditable controls and economic transparency. As Agentforce matures, enterprises will demand pre-configured agent libraries, reusable governance blueprints and outcome-linked pricing for optimisation, especially in regulated sectors. Providers must invest in CTA-level architectural depth, Data 360 semantics, runtime observability and FinOps-to-KPI attribution to maintain credibility.

For *enterprises*, the near-term risk is scaling agents faster than data governance and change discipline can support, leading to model drift, compliance exposure and adoption fatigue. For *providers*, the risk is proof scarcity, including insufficient UK reference outcomes and weak consumption-to-value telemetry. They must also expect an increase in demand for managed services that blend AgentOps, DevSecOps and OCM, alongside professional services that orchestrate cross cloud workflows under design authorities.

Action: *enterprises* in the UK should enforce Trust Layer governance and Data Cloud readiness before scaling. Establish design authority and require AgentOps and DevSecOps. Use KPI runbooks and insist on AppExchange-proven outcomes. *Providers* should publish metrics and industrialise assurance as intellectual property. Deepen architectural leadership and standardise FinOps, RiskOps and AgentOps. Finally, convert pilots into certifiable outcome priced solutions.

In the UK, commitments are based on proven capabilities such as AppExchange evidence, CTA-led architectures, Agentforce certification coverage and clear FinOps-to-KPI links. Vendor selection criteria require KPI-based operating models, auditable decisions and Data Cloud activation for autonomous deployments.

Provider Positioning

	Professional Services	Value Realization and Optimization Services	Innovation on Salesforce/Agentforce
Accenture	Leader	Leader	Leader
Atos	Contender	Contender	Contender
Birlasoft	Contender	Contender	Contender
Capgemini	Leader	Leader	Leader
Coforge	Rising Star ★	Leader	Product Challenger
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Product Challenger	Product Challenger
DXC Technology	Product Challenger	Product Challenger	Product Challenger
EPAM Systems	Product Challenger	Product Challenger	Contender

Provider Positioning

	Professional Services	Value Realization and Optimization Services	Innovation on Salesforce/Agentforce
Fluent:cx	Not In	Not In	Rising Star ★
Genpact	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Product Challenger	Rising Star ★	Leader
IBM	Product Challenger	Product Challenger	Product Challenger
Infosys	Leader	Leader	Leader
KPMG	Contender	Not In	Product Challenger
LTM	Leader	Leader	Product Challenger
Mastek	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

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	Professional Services	Value Realization and Optimization Services	Innovation on Salesforce/Agentforce
Movate	Not In	Contender	Not In
Nextview Consulting	Product Challenger	Product Challenger	Product Challenger
NTT DATA	Product Challenger	Product Challenger	Product Challenger
OSF Digital	Product Challenger	Contender	Contender
Persistent Systems	Product Challenger	Product Challenger	Product Challenger
PwC	Leader	Product Challenger	Product Challenger
Reply	Rising Star ★	Product Challenger	Leader
Slalom	Product Challenger	Product Challenger	Product Challenger
TCS	Leader	Leader	Leader

Provider Positioning

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	Professional Services	Value Realization and Optimization Services	Innovation on Salesforce/Agentforce
Tech Mahindra	Leader	Leader	Leader
ThirdEye Consulting	Contender	Contender	Not In
UST	Product Challenger	Product Challenger	Product Challenger
Wipro	Leader	Leader	Leader
YASH Technologies	Contender	Product Challenger	Product Challenger
Zensar Technologies	Contender	Contender	Contender

The study benchmarks **Salesforce ecosystem partners** across key dimensions –
portfolio, innovation, leadership strength and client experience.

Professional Services

Value Realization and Optimization Services

Innovation on Salesforce/ Agentforce

Simplified Illustration Source: ISG 2026

Definition

The Salesforce ecosystem has maintained its transformative trajectory over the past 12-18 months, driven by rapid advancements in AI, data integration and automation. As the enterprise CRM market continues to expand, Salesforce retains its leadership position with over 20 percent global share and dominance across sales, service and marketing categories.

At Dreamforce 2025, Salesforce unveiled its bold vision of Agentic Enterprise, where AI-powered agents collaborate with humans to deliver scalable, intelligent business outcomes. Central to this strategy is the evolution of Agentforce into Agentforce 360, a unified platform layer connecting sales, service, marketing, commerce, Tableau, MuleSoft and Slack. With innovations such as Data 360 (Data Cloud) for contextual intelligence and Agentforce Vibes for natural language-driven development, Salesforce is redefining enterprise workflows and accelerating time-to-value for organisations worldwide.

For partners and providers, these developments present significant opportunities. Enterprises are seeking partners that can deliver end-to-end capabilities, from consulting and implementation to managed services and innovation, while embedding AI responsibly within governance frameworks. Providers that can orchestrate multicloud deployments, leverage industry-specific agents and enable automation at scale will be well-positioned to capture this demand.

While large enterprises lead Salesforce adoption, the midmarket is emerging as a key growth area. These organisations prioritise cost-effective, modular solutions that deliver quick ROI and seek partners offering scalable frameworks, prebuilt accelerators and tailored managed services. For providers, this segment represents a high-volume opportunity to deliver standardised yet flexible offerings, leveraging AI and automation to simplify complexity and boost agility.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following three quadrants for services/solutions: Professional Services, Value Realization and Optimization Services, and Innovation on Salesforce/Agentforce.

This ISG Provider Lens® study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Value Realization and Optimization Services

Who Should Read This Section

This report is valuable for service providers offering **Salesforce value realization and optimization services** in the **U.K.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Technology professionals

Should read this report to understand the overall service inclusion of managed service providers to align with their digital transformation goals, risk management and cost optimization. It outlines providers' capabilities in next-gen managed services for business innovation through continuous improvement of Salesforce organizations to reinvent their CRM.

Service delivery professionals

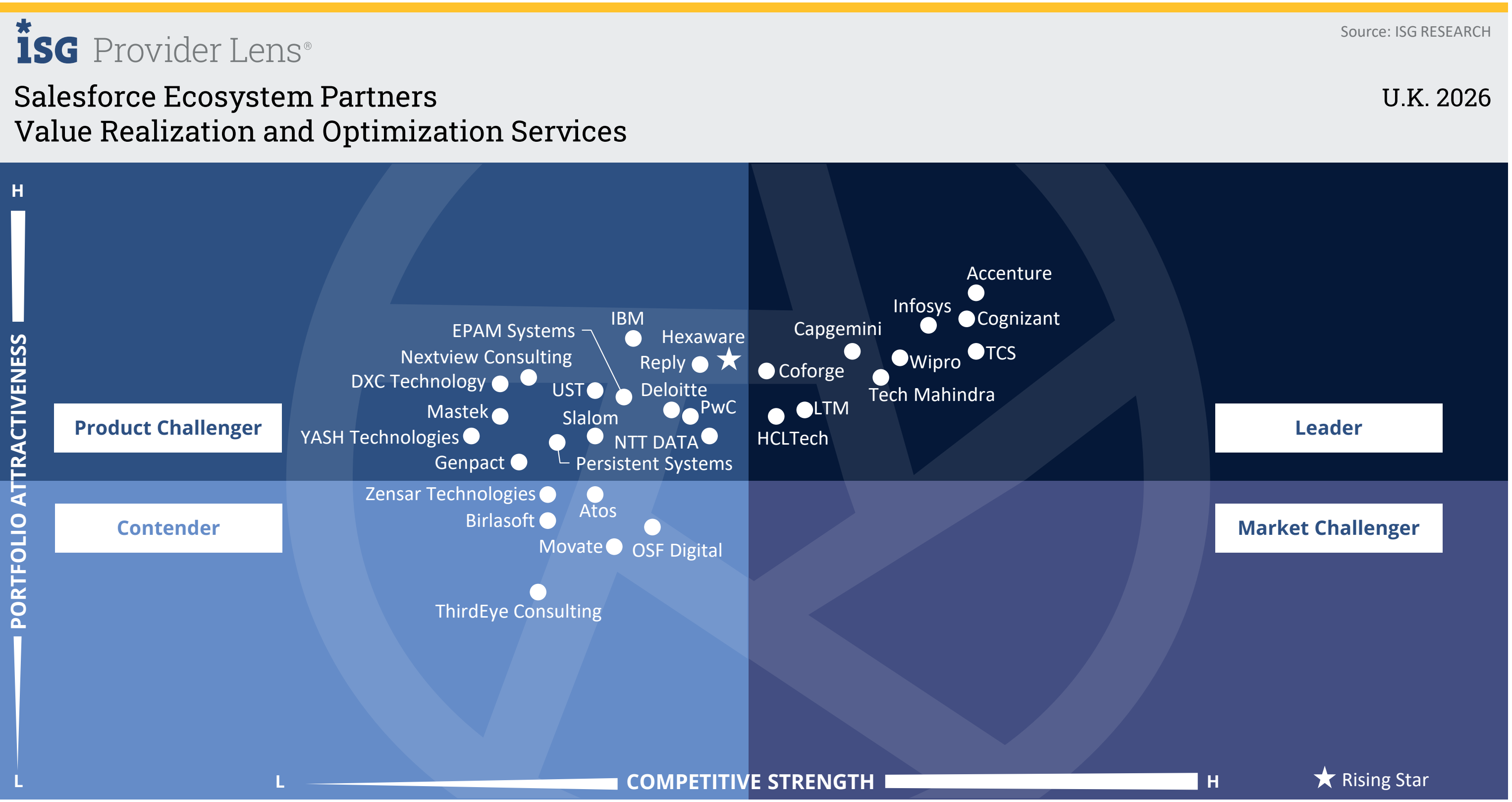
Should read this report to understand how managed service providers maintain service quality, ensure compliance, and deliver uninterrupted platform performance. The report offers actionable insights into their proven operational practices, automation-driven monitoring and AI-enabled observability, enabling professionals to benchmark and adopt strategies that enhance reliability and efficiency across the Salesforce ecosystem.

Data management professionals

Should read this report to identify strategies for maintaining data integrity and compliance while optimizing Salesforce performance. They will gain insights into how managed services and AI-driven monitoring can ensure secure and reliable data operations. Additionally, this report will provide guidance on leveraging advanced data governance frameworks to support analytics and decision-making.

Procurement professionals

Should read this report to select providers offering proactive value realization and cost control through FinOps and RiskOps frameworks. The report will help them identify providers that transform maintenance into a strategic function for measurable improvements. It offers insights into service providers' governance models, SLA-driven performance and cost optimization strategies that align with enterprise goals for resilience, scalability and operational excellence goals.



This quadrant assesses providers that convert support into continuous value via **managed services, FinOps (TCO)** and **RiskOps (GRC), Agentforce 360** automation and **modernisation**, delivering **measurable, ongoing business outcomes.**

Sonam Chawla

Definition

The Value Realization and Optimization Services quadrant evaluates service providers on their ability to help clients secure, sustain and maximise long-term value derived from their investments into the Salesforce ecosystem. Beyond traditional support, this requires a proactive approach to maximise impact and value. Providers drive continuous platform evolution, security governance and operational efficiency to turn maintenance into a strategic function to empower clients with business-aligned continuous, measurable improvements.

Providers use managed services capabilities to continuously optimise the platform performance and operations aligned with Salesforce best practices. This includes business enablement, AI-driven monitoring, maintenance (AgentOps) and FinOps to reduce the TCO. Moreover, robust governance through RiskOps (GRC), modernising client solutions and expertly managing change and release management is required to enable seamless, controlled platform evolution.

Eligibility Criteria

1. Must possess a dedicated, demonstrable practice offering **managed service** capabilities across the **Salesforce platform lifecycle**, including proactive support, maintenance and **continuous optimisation** services
2. Evidence of an approach focused on continuous value realisation and impact and business value optimisation, **moving beyond break-fix support to achieve measurable strategic client outcomes**
3. Must incorporate advanced operational frameworks, such as **FinOps (TCO) and RiskOps (GRC)**, demonstrating a commitment to secure, compliant and cost-efficient **platform management at scale**
4. Proven ability to drive long-term platform health through **platform and solution modernisation**, ensuring continuous alignment with Salesforce releases and future-proofing client environments
5. Capacity to manage and optimise all client-facing digital interfaces and internal digital experience management, ensuring high platform adoption and **seamless integration across user touchpoints using automation**
6. Demonstrated expertise in managing environments **integrated with external services**, such as **BPaaS** (e.g., procure-to-pay (P2P), order-to-cash (O2C), HR processes, such as payroll and onboarding, and other key enterprise systems to ensure end-to-end business process continuity
7. Commitment to leveraging advanced, modern techniques, including Agentforce 360 strategies and **AI-driven automation**, to enhance **platform performance** and **monitoring** and overall service delivery efficiency
8. Existence of a specialised practice focused solely on value realisation and impact and business value optimisation, with **KPIs demonstrating measurable and continuous improvements** in client performance
9. Compelling list of **region-specific use cases and references**

Observations

The UK value realisation and optimisation services market is undergoing accelerated maturity, shaped by regulatory pressure, economic scrutiny, rapid AI adoption and rising expectations for measurable business outcomes. Compared with last year, the quadrant reflects a noticeable shift in provider positioning as buyers gravitate towards partners that offer continuous optimisation, deep governance capabilities and industry-specific accelerators rather than just transactional managed services. The market is also influenced by consolidation, with providers acquiring niche data-, AI-, FinOps- and compliance-focused capabilities to strengthen their value realisation offerings. Enterprises in the region are also increasingly prioritising governance-first delivery models, transparent cost-to-value insights and AI-enabled service orchestration, which is driving providers towards more proactive, autonomous and business-aligned service constructs.

This shift is accompanied by a move from activity-based support towards outcome-driven optimisation, where adoption, productivity, cycle-time reduction and ROI are the core values. Enterprises in the UK expect providers to integrate AI driven observability, automated release governance and structured OCM to ensure sustainable business impact. Experience-centric optimisation is also gaining prominence, with enterprises evaluating value through improved customer and employee journeys enabled by personalisation, omni-channel engagement and digital experience management. Finally, industry-specific accelerators, ESG-aligned optimisation models and AI-assisted delivery are becoming essential, supported by workforce upskilling that prepares teams to operate in increasingly intelligent, agent orchestrated environments.

From over 33 companies assessed for this study, 31 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture's scalable architecture and focus on practical change management allow clients to adopt new capabilities without disrupting ongoing work, making the company a reliable partner for operating and evolving CX operations over time.

Capgemini

Capgemini drives adoption with real-time stakeholder dashboards and continuous feedback loops, reducing deployment risk and disruption while sustaining consistent release readiness and value realisation across cycles.

Coforge

Coforge Salesforce Agentforce and AI Platform enables AI agents to autonomously execute tasks that previously required manual intervention, such as claim processing in insurance or customer support in travel.

cognizant

Cognizant combines CRM maturity assessments, agentic AI readiness, CRM organisation consolidation, a repeatable design thinking framework, and 360° licence evaluation and optimisation to accelerate value realisation, strengthen cross-functional alignment and reduce operating costs at scale.

HCLTech

HCLTech's InFusion Suite including Case Agent, Intelligent DevAssist and APM GPT automates L1.5 operations, elevates code quality and streamlines project management, materially reducing incidents, effort and delivery cycle time.

Infosys' global Salesforce industry cloud expertise and AI-first delivery methodology aim to accelerate time-to-market and improve project quality, while managed application services leverage AI to optimise operational efficiency and accuracy.

LTM's AI-driven observability via AgentOps and Agentforce 360 provides real-time, end-to-end visibility and anomaly detection across agent workflows, integrations and AI consumption, enabling proactive root cause analysis, policy-driven self-healing and optimisation.

TCS differentiates itself by operationalising value realisation and linking consumption spending to CX. It embeds agentic change programmes, enforces audit cadence, prioritises personalisation by impact, and scales through a design-authority COE.

Tech Mahindra embeds agentic AI, observability and governance to build self-optimising platforms that proactively detect, audit and resolve issues, reducing manual work and delivering reliable, compliant performance at scale.

Wipro's WINGS observability platform unifies performance, topology and SLAs, leveraging AI correlation, prediction and remediation to drive proactive operations, reduce noise and downtime, accelerate root-cause diagnosis and enhance Salesforce platform performance.

Hexaware (Rising Star) offers pre-built data models, workflows and integration playbooks tailored for sectors such as healthcare, financial services, insurance and manufacturing to reduce implementation complexity and improve time-to-value by standardising processes.

Hexaware

Rising Star

"Hexaware delivers end-to-end Salesforce AMS spanning Build, Transform and Run powered by automation, digital workers and BPaaS operations, with Amaze, Tensai and RapidX enabling intelligent automation, predictive monitoring and reliable releases."

Sonam Chawla

Overview

Hexaware is headquartered in Mumbai, India. It has more than 31,500 employees across 28 countries. In FY24, the company generated $1.4 billion in revenue. Hexaware's value realisation and optimisation services use an end-to-end application management model spanning Build, Transform and Run, enabled by automation, digital workers, outcome-based AMS and business process as a service (BPaaS)-style managed operations for standardised, high-volume Salesforce processes. In the UK, its managed services footprint supports compliance and sustained optimisation, reinforced by the Canary Wharf HQ and Birmingham hub, with 63 certified professionals in the region.

Strengths

Salesforce value realisation and optimisation: Hexaware employs a structured approach combining health checks, maturity assessments and niche CoE skills to drive continuous performance improvement across Salesforce environments. Proprietary solutions such as Tensai® support dashboarding and AI-driven predictive case management, enabling proactive enhancements, sustained business outcomes and improved CX.

RapidX for Salesforce org intelligence: Hexaware leverages its proprietary platform RapidX to deliver a comprehensive analysis of Salesforce environments, including metadata inventory, technical debt and functional process flows. The platform supports optimisation initiatives such as org consolidation, transition from high-code to low-code and governance improvements. It helps reduce TCO and accelerate modernisation, particularly in complex UK Salesforce org consolidations following M&A.

Proprietary platforms for continuous automation: Hexaware's platforms such as Tensai® and Amaze® support automation across testing, deployment, data migration and modernisation activities. For instance, automated test case generation and cognitive data migration accelerators minimise manual effort and errors during Salesforce upgrades and cloud transitions. These tools are instrumental in achieving operational efficiencies and scalability in managed service engagements.

Caution

Although Hexaware has established a strong UK presence in the BFSI sector through its Salesforce offerings, it should expand into additional industries and emphasise outcome-based, profit and risk-sharing pricing models to deliver differentiated value and clear commercial alignment.

Appendix

The ISG Provider Lens® 2026 – Salesforce Ecosystem Partners study analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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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 service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of March 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

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

Lead Analyst

Sonam Chawla
Senior Lead Analyst

Sonam Chawla is a senior lead analyst at ISG, specializing in authoring Provider Lens® studies on the Google, Oracle and Salesforce ecosystems. With around eight years of experience in the market research industry, she has developed strong expertise in insight generation, market analysis, secondary research, report writing, blog creation, and company analysis.

Her key areas of interest include hyperscalers, cloud, infrastructure technology, digital workplaces, and enterprise collaboration. In her current role, Sonam also contributes to the research process by authoring Focal Points and Enterprise Context, providing valuable insights into regional and global market trends. Additionally, she manages custom engagement requests from providers and advisors.

Before taking on this role, Sonam worked as a research analyst, where she was responsible for developing syndicated research reports and providing consulting services for various research projects.

Enterprise Context and Global Overview Analyst

Riya Tomar
Research Analyst

Riya Tomar is a Research Analyst at ISG, supporting Provider Lens® Ecosystem Studies. She brings over three years of experience in technology research and advisory services. In her current role, Riya contributes to service provider evaluations and market trend analysis. She collaborates with lead analysts to validate data, prepare the Enterprise Context and Global Summary sections and maintain consistency across reports.

Prior to her current role, Riya authored research reports and created custom client presentations for strategic advisory projects, translating complex datasets into actionable insights and delivering high-quality outputs for decision-makers.

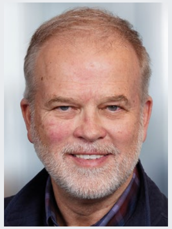
Study Sponsor

Heiko Henkes

Director & Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice.

His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies, and change management in a Cloud-AI-driven business landscape. Henkes is renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.



IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

About Our Company & Research

ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

ISG Research™

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ISG

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REPORT: SALESFORCE ECOSYSTEM PARTNERS