ISG Provider Lens®

Salesforce Ecosystem Partners

A research report comparing strengths and advantages of Salesforce partners

Customized report courtesy of:

TECH mahindra

QUADRANT REPORT | APRIL 2026 | U.S.

Table of Contents

Executive Summary 03

Provider Positioning 06

Introduction

- Definition 10
- Scope of Report 11
- Provider Classifications 12

Appendix

- Methodology & Team 35
- Author & Editor Biographies 36
- About Our Company & Research 39

Professional Services 13 – 19

- Who Should Read This Section 14
- Quadrant 15
- Definition & Eligibility Criteria 16
- Observations 17
- Provider Profile 19

Value Realization and Optimization Services 20 – 27

- Who Should Read This Section 21
- Quadrant 22
- Definition & Eligibility Criteria 23
- Observations 24
- Provider Profile 27

Innovation on Salesforce/ Agentforce 28 – 33

- Who Should Read This Section 29
- Quadrant 30
- Definition & Eligibility Criteria 31
- Observations 32

Report Authors: Ashwin Gaidhani and Megha Dodke

Salesforce agentic enterprise vision has moved past pilots to real-world implementations driven by partner innovation

Market Context

A shift to an AI-first operating model is reshaping the U.S. Salesforce market. Enterprises in the region are standardizing on Agentforce 360 to operationalize autonomous workflows, anchoring them in Data 360 for governance. This architectural baseline is reinforced by a decisive turn toward API-first integration using MuleSoft and adjacent middleware to connect complex ERP, HCM and bespoke estates. The result is a structural move away from isolated CRM rollouts toward cross-cloud, data-grounded platforms.

Regulatory pressures in the U.S. are further compelling this move. Healthcare and life sciences buyers emphasize HIPAA-grade controls; financial services prioritize auditability and model governance; and state-level privacy regimes raise the bar for consent, lineage and access controls. The report also highlights that AI governance is of utmost importance with providers embedding governance-by-design in the SDLC. AI GRC frameworks, privacy-by-design, and release-cycle controls are becoming inseparable from delivery.

Buyers are pushing beyond time and materials constructs toward fixed-price and outcome-linked models, tied to measurable business KPIs. This approach aligns with the industrialization observed in the region; providers productize industry accelerators, reference architectures and repeatable assets to compress timelines and make value realization increasingly predictable. Finally, U.S. midmarket demand is expanding, but with a different pattern than large enterprises. Buyers in this market segment seek modular, cost-controlled entry points that can scale, favoring prebuilt accelerators and managed evolution over sweeping replatforms.

Agentforce-first designs and **Data Cloud day zero** are now U.S. table stakes.

Enterprise Priorities

Buyers in the U.S. translate these market conditions into a sharper, outcome-anchored mandate for platform transformations and run services. Decision criteria concentrate on evidence of governed AI, data foundations and accelerated time-to-value without compromising compliance.

Data-grounded autonomy: Enterprises now require a day-zero data cloud and proof that agents are grounded in governed first-party data. They expect clear data models, lineage and zero-copy patterns to limit replications while enabling real-time context. Proof points include working segmentation, identity resolution and safe prompt/guardrail designs integrated with release management.

AI-based GRC: Enterprises are focusing on GRC embedded in the delivery model, human-in-the-loop checkpoints, audit trails and rollback-tested cutovers from design through operations. In the regulated industries in the U.S., clients are increasingly looking out for policy guardrails, decision logs and bias testing before agentic features reach production.

From multicloud build to measurable value: Large enterprises demand cross-cloud orchestration and ERP/back-office integration, shortlisting providers that commit to KPI-anchored milestones (for example, deflection and compressed cycle time) and structured value reporting. The region shows buyers favor fixed-fee phases with outcome-based incentives to lock in accountability.

Midmarket pragmatism: U.S. midmarket buyers prioritize modular quick starts, accelerator-led programs and post-go-live optimization that scale without overextending budgets. They seek onshore governance paired with flexible nearshore/offshore execution and clear pathways from initial scope to broader automation.

Run for impact, not tickets: In value realization, buyers pivot to AgentOps, FinOps and RiskOps as standards. They expect proactive monitoring, AI-assisted remediation, release hygiene and cost-to-serve reduction as demonstrated by before-and-after KPIs rather than SLA compliance alone.

Provider Dynamics

Providers in the Salesforce professional services space are converging on an *agentic by design* delivery pattern that mirrors buyer scrutiny. Leading models in the U.S. place Data Cloud and MuleSoft at the center of discovery and architecture, with cross-cloud blueprints and industry reference models front-loaded to reduce ambiguity. Teams use product-aligned operating models, encompassing backlog-driven increments, value checkpoints and architecture guardrails inside CI/CD to prevent customization drift. Controls include model-risk sign-off gates, prompt libraries with red-team testing and dual-track release plans to preserve stability in regulated settings. Provider differentiation here hinges on the ability to demonstrate fit-for-purpose industry assets (for example, field service patterns and financial workflows) and to prove integration fidelity with ERP and data platforms. Buyers can identify laggards from their dependence on module-by-module builds, over-customization in lieu of data modeling or their focus on AI governance as an afterthought. U.S. buyers also shortlist providers that can operate in a *local governance plus global execution*" rhythm and show clear transition plans from build to run.

Providers in the value realization and optimization services space are recasting these run services as value engines. Leading players in the U.S. market embed AgentOps to auto-triage, summarize and remediate low-complexity issues; implement FinOps for license and credit optimization; and standardize RiskOps for continuous control monitoring. The critical mechanisms here include observability across integration chains (such as Salesforce with ERP systems or data lake), automated regression or impact analysis for tri-annual releases, and ticket-prevention backlogs tied to code refactoring and enforcement of standards. Providers exhibiting economic discipline have the capability to switch contracts to fixed-price catalogs and KPI-linked incentives, with dashboards that track cost-to-serve, adoption and deflection. On the other hand, laggards remain trapped in labor-centric, SLA-only constructs without AI-assisted prevention, lean change management, or structured value reporting. U.S. enterprises, especially in healthcare and financial services, also seek a provider's cybersecurity posture within application management services (AMS), encompassing data loss prevention, access controls and incident playbooks aligned to sector-specific regulations.

Leading U.S. players focusing on innovations on Salesforce/Agentforce operationalize autonomous agents beyond pilots to areas such as agent factories with lifecycle observability, hybrid reasoning and policy guardrails, slack- and voice-activated workflows and Flow/Apex plus API patterns for transactions across front and back office. Providers deploy pre-configured agent blueprints for domains such as service triage, guided selling or revenue operations, but insist on human-in-the-loop checkpoints and audit trails. At the same time, providers assessed in the U.S. emphasize on zero-copy or limited-replication data access to external platforms to keep costs and risks contained, while improving response accuracy. They also recognize the value of validation mechanisms such as gated promotion from sandboxes with safety tests, prompt/response capture for audit, and rollback-ready release plans. In this environment, provider differentiation is achieved when they can connect agent outcomes to measurable KPIs and scale from one use case to a governed mesh of agents. Gaps surface when teams treat agent builds as standalone chat experiences without data grounding, model governance or cross-system actions.

Outlook

Over the next 12–18 months in the U.S., the center of gravity will continue shifting from build completion to verifiable value realization under governance. Two forces will define the trajectory, namely, data-grounded autonomy at scale and industrialized run that prevents technical debt. Outcome-linked commercials are expected to expand, with buyers insisting on KPI-anchored phases and catalog-based AMS that redirect efforts from defect handling to enhancement velocity.

For enterprises, the near-term risks include launching agents on incomplete data foundations or without enforceable guardrails, resulting in rework, compliance gaps and user distrust. Buyers should plan their deployments, which include complete identity resolution and data policies, embedded human approval in early cycles and release-quality evidence before expanding scope. For providers, the risk is commoditization, where accelerators and claims outpace proof. Sustained advantage will depend on demonstrable controls, zero-copy data patterns where appropriate and transparent value reporting.

The leaders will make their mark with their ability to connect data cloud-anchored architectures with governed agent lifecycles and metric-based AMS. In practice, this means offering modular U.S. midmarket entry points that scale, proving cross-cloud and ERP integration fidelity and institutionalizing AgentOps/FinOps/RiskOps to keep platforms secure, performant and economically efficient.

Enterprise shortlists in the U.S require three proofs, namely, a day zero data cloud blueprint, AI GRC embedded in the SDLC with auditable guardrails and a commercial model that ties phases to measurable business KPIs, especially for regulated industries and midmarket buyers seeking predictable ROI.

Provider Positioning

	Professional Services	Value Realization and Optimization Services	Innovation on Salesforce/ Agentforce
Absyz	Contender	Not In	Not In
Accenture	Leader	Leader	Leader
Atos	Contender	Product Challenger	Contender
Birlasoft	Product Challenger	Product Challenger	Contender
Brillio	Contender	Not In	Product Challenger
Capgemini	Leader	Leader	Leader
CI&T	Not In	Not In	Product Challenger
Coastal	Leader	Leader	Product Challenger
Coforge	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader

Provider Positioning

	Professional Services	Value Realization and Optimization Services	Innovation on Salesforce/ Agentforce
Customertimes	Product Challenger	Product Challenger	Product Challenger
Deloitte	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Contender
EPAM Systems	Product Challenger	Product Challenger	Contender
Fujitsu	Product Challenger	Product Challenger	Market Challenger
Genpact	Rising Star ★	Product Challenger	Product Challenger
Globant	Product Challenger	Product Challenger	Not In
Grazitti Interactive	Not In	Contender	Not In
HCLTech	Leader	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

Page 3 of 4

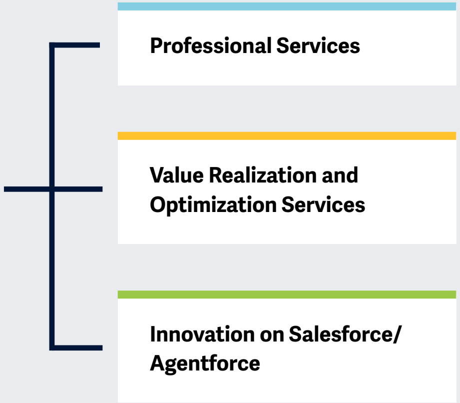
	Professional Services	Value Realization and Optimization Services	Innovation on Salesforce/ Agentforce
Huron	Market Challenger	Market Challenger	Not In
IBM	Leader	Leader	Leader
Infosys	Leader	Leader	Leader
LTM	Leader	Leader	Rising Star ★
Mastek	Product Challenger	Contender	Contender
Movate	Not In	Contender	Contender
Mphasis	Product Challenger	Contender	Not In
Myridius (Aethereus)	Market Challenger	Market Challenger	Contender
NTT DATA	Rising Star ★	Leader	Leader
OSF Digital	Product Challenger	Market Challenger	Market Challenger

Provider Positioning

Page 4 of 4

	Professional Services	Value Realization and Optimization Services	Innovation on Salesforce/ Agentforce
Perficient	Product Challenger	Product Challenger	Leader
Persistent Systems	Leader	Rising Star ★	Product Challenger
PwC	Leader	Leader	Leader
Slalom	Leader	Product Challenger	Leader
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Product Challenger
UST	Contender	Contender	Not In
Wipro	Leader	Leader	Leader
YASH Technologies	Contender	Contender	Contender
Zensar Technologies	Contender	Contender	Contender

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



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 AIpowered 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 languagedriven development, Salesforce is redefining enterprise workflows and accelerating time-tovalue for organizations worldwide.

For partners and providers, these developments present significant opportunities. Enterprises are seeking partners that can deliver endto-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 organizations prioritize 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 standardized 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, 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.

Professional Services

Who Should Read This Section

This report is valuable for providers offering **professional services** in the **U.S.** 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 learn about providers that deliver advanced Salesforce engineering and AI governance for resilient architectures. This report will help them understand how strategic advisory and cross-cloud orchestration optimize enterprises' complex landscapes. It also provides insights into GSI's and boutique firms' Salesforce optimization capabilities through proven customer success stories and out-of-the box solutions across industry verticals.

CRM heads

Can leverage this report to drive CX programs and roadmap planning. The report will help benchmark partners for innovation, automation and AI capabilities, and outline Salesforce adoption's major trends, challenges and drivers.

Data management professionals

Should read this report to explore providers that ensure secure, compliant data integration across Salesforce clouds. This report will guide them on leveraging Data 360 and AI governance to maintain integrity and compliance in complex environments. It will also help enterprises select the best-fit provider based on their technical expertise, roadmap services and innovative data-driven solutions.

Procurement professionals

Should read this report to evaluate providers offering strategic advisory and end-to-end delivery for Salesforce. This report will help procurement teams select partners that deliver measurable cost optimization and compliance assurance. It also examines providers' overall portfolios and strengths in Salesforce implementation and managed services.

Research and innovation professionals

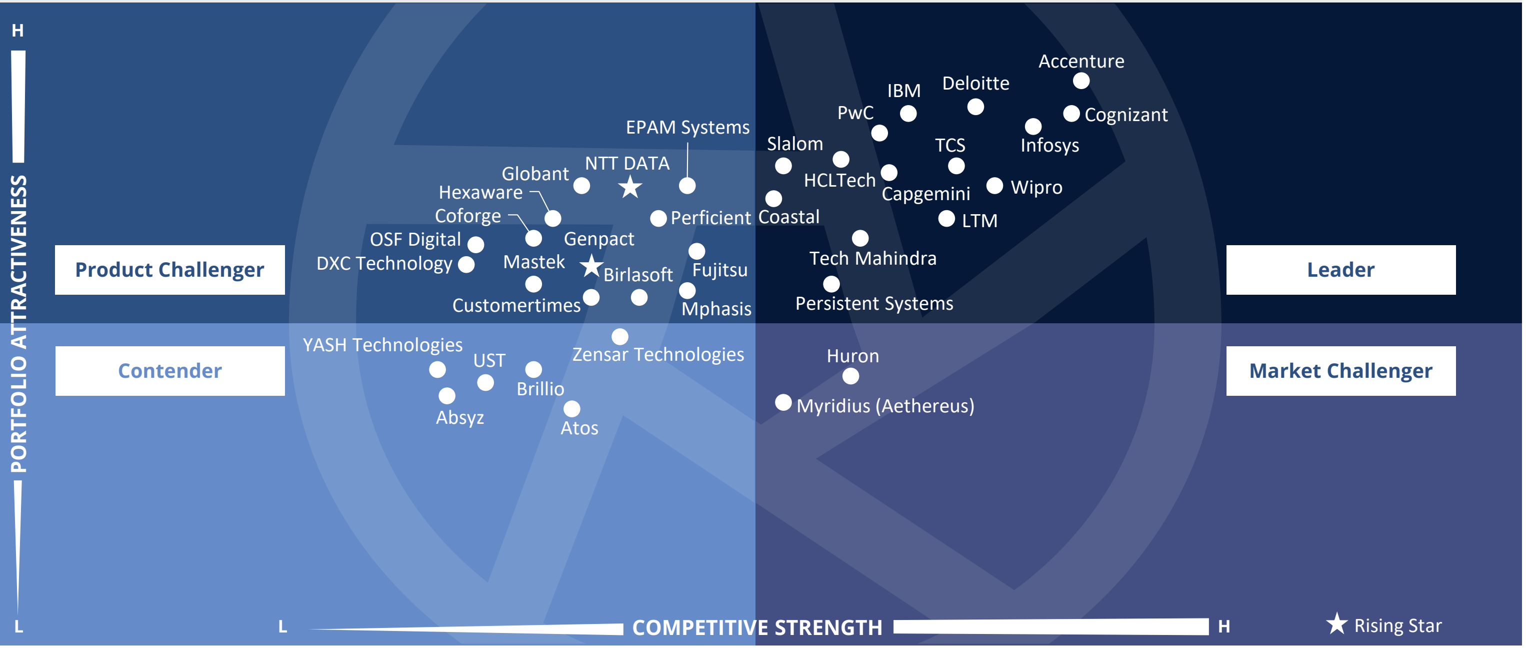
Should read this report to assess providers embedding GenAI and agentic capabilities for future-ready enterprise models. The report will help them identify innovators driving next-generation solutions and advanced technical capabilities, and serve as a guide to select providers with the highest innovation potential and an outcome-driven approach.

ISG Provider Lens®

Source: ISG RESEARCH

Salesforce Ecosystem Partners Professional Services

U.S. 2026



This quadrant evaluates provider for their ability to deliver **end-to-end enterprise transformations** via **strategic advisory and technical engineering, and** their capacity to safely deploy an **Agentic Enterprise roadmap** with rigorous **AI governance**.

Ashwin Gaidhani and Megha Dodke

Definition

The Professional Services quadrant evaluates service providers based on their deep expertise and advanced technical capabilities to transform and optimize complex client business landscapes using Salesforce. This scope extends beyond standard configuration to include strategic advisory and end-to-end delivery of integrated, nextgeneration solutions. Success depends on connecting disparate enterprise systems and orchestrating sophisticated, cross-cloud workflows for technical resilience and strategic business outcomes.

A core focus is the provider's proficiency in deploying the Agentic Enterprise road map, specifically via Agentforce 360, to infuse generative AI (Gen AI) and agentic capabilities across sales, service and operations. Providers must apply the AI governance, risk and compliance (GRC) framework for responsible, ethical and compliant deployment. The ideal provider blends business process architecture, OCM and technical platform engineering to deliver measurable effort and cost optimization.

Eligibility Criteria

1. Proven capability in **solution design, rollout and optimization of Salesforce modules** and AIdriven experiences, demonstrated by certified specialists and referenceable client projects leveraging the platform's native AI agents
2. Expertise **in integrating Salesforce with major external enterprise systems (SAP/ Oracle ERP), internal BPM** and collaboration tools, using MuleSoft, APIs, middleware or other industry-standard integration platforms
3. Evidence of **proprietary frameworks, accelerators and robust data migration capabilities** for complex and multicloud Salesforce deployments across sales, service, marketing and Experience Cloud
4. Ability to provide **advisory services** that define an Agentic Enterprise road map, incorporating **AI GRC frameworks** to ensure **secure and ethical technology adoption** (GenAI/agentic AI)
5. Profound understanding of **industry-specific service processes** and the ability to apply customer process architecture to optimize service models, utilizing Service Cloud, Field Service and digital engagement products
6. Demonstrated approach to managing the human and process aspects of transformation, including proactive **OCM, stakeholder management, training** and strategic guidance for effort and cost optimization
7. Minimum required number of **Salesforce-certified professionals**, a **global delivery model** and significant **customer references** in enterprise-level, complex engagements
8. Compelling list of **region-specific use cases and references**

Observations

The Salesforce professional services landscape has transitioned from traditional, module-by-module deployments to holistic, AI-first transformations of enterprises. Engagements no longer begin with simple capability mapping; they launch with comprehensive Agentforce-ready blueprints and business model reinvention strategies.

A foundational shift is the establishment of Salesforce Data Cloud as a mandatory day-zero architecture. Providers realize that robust Customer 360 personalization and autonomous AI are impossible without a unified, zero-copy data foundation, making Salesforce Data Cloud the necessary anchor.

Furthermore, complex cross-cloud and API-first integrations, using MuleSoft to connect Salesforce with massive legacy ERPs, are now enterprise table stakes. Delivery methodologies have also become heavily industrialized. Leading SIs are moving away from custom builds and using highly productized industry accelerators, pre-built templates and proprietary assets to drastically compress deployment timelines.

Concurrently, Governance-by-Design is no longer an afterthought. Strict AI Governance, Risk, and Compliance (GRC), along with privacy frameworks, are now deeply embedded directly into the software development lifecycle (SDLC). Finally, this standardization and accelerator-led approach is disrupting traditional commercial models. Providers are actively shifting away from legacy Time and Materials (T&M) contracts in favor of fixed-price and outcome-linked constructs that tie the fee directly to measurable business KPIs and guaranteed value realization.

From the 40 companies assessed for this study, 37 qualified for this quadrant, with 15 being Leaders and two Rising Star.

accenture

Accenture leverages a global delivery network to provide 24/7 technical change management, ensuring that complex, multi-country rollouts maintain architectural integrity while meeting local regulatory requirements and user adoption goals through its integrated Reinvention Services unit.

Capgemini

Capgemini, unlike competitors that may focus solely on CRM front-end applications, excels at complex back-end integration and specializes in unifying legacy systems, IT and OT using MuleSoft and Salesforce Data Cloud.

Coastal

Coastal, with its acquisition by TCS, is expected to see a boost in overall AI advisory capabilities. Through strategic consulting, it actively drives the widespread consumption of AI credits and cutting-edge products such as Agentforce.

cognizant

Cognizant excels in full-stack digital transformation, blending deep engineering roots with specialized industry consulting. It differentiates itself through the App-Modernization framework, enabling clients to make a seamless transition from legacy systems to Salesforce.

Deloitte.

Deloitte Digital offers industry-specific solutions and accelerators across financial services, government, public services, life sciences, and healthcare, accelerating time-to-value and reducing implementation risks.

HCLTech

HCLTech uses a unique product-aligned operating model rooted in software engineering. By aligning an overarching business strategy with complex Salesforce architecture, it delivers flexible, composable applications and experience-led transformations across the U.S.

IBM

IBM uses a proprietary AI-powered workbench, IBM Consulting Advantage, to accelerate Salesforce delivery. This platform uses *assistant* agents to automate code generation and testing, significantly reducing time-to-market for complex global rollouts.

Infosys is a pioneer in outcome-based Salesforce partnerships (OSP), taking ownership of Salesforce licenses on behalf of its enterprise clients. By bundling licenses and services into a single flexible contract, it optimizes TCO and guarantees ROI.

LTM's consulting and implementation strength in the Salesforce ecosystem is in its advisory-led, industry-anchored delivery model, backed by over 3,620 consultants, more than 10,100 certifications and over 4,500 projects. It pairs enterprise-grade scale with agile execution.

Persistent

Persistent System's portfolio spans 24 offerings across BFSI, healthcare/life sciences and hi-tech, including Agentforce-enabled solutions such as Agentic Digital Lending, Pharma Hub Services, Contact Center Transformation (iCCaaS), and cross-domain accelerators such as Unified 360 and RCA Intelligent Migrator/Deployer.

PwC has the largest number of certified technical architects (CTAs) in the Americas and EMEA. This concentration of talent provides the strong foundation for the company to undertake the most complex, multicloud enterprise implementations.

Slalom

Slalom's unique consulting pillar is its Zero Legacy framework, which helps organizations streamline complex, over-customized Salesforce environments to create a lean launchpad for AI adoption and long-term scalability.

TCS recently acquired Coastal and ListEngage as top Salesforce partners to dominate the mid-to-high-end manufacturing and service-led market. These acquisitions bolster its onshore delivery capabilities, ensuring client proximity in North America.

Tech Mahindra has a strong presence in the complex global communications, media and entertainment sector. Leveraging its robust teleco roots and an organic growth strategy, it implements complex, multicloud enterprise solutions and has maintained a global CSAT score of around 4.9 CSAT for five consecutive years.

Wipro utilizes industry-specific Lightning Bolt solutions to reduce regional implementation time by 40 percent, unlike its competitors, which often rely on heavy custom coding, ensuring rapid time-to-value for complex global enterprises.

Genpact's (Rising Star) go-to-market (GTM) strategy involves embedding Salesforce solutions directly into large transformation and operations-led deals, instead of fostering standalone IT implementations. This approach enables it to drive deep engagements with Genpact-155 (top-tier) accounts.

NTT Data (Rising Star) stands out for its industrialized delivery engine, deep MuleSoft/data cloud integration capabilities, large certified talent pool and Agentforce-ready consulting frameworks. The company has been recognized by Salesforce as a leading outsourcing service provider (OSP) partner.

Tech Mahindra

Leader

"Tech Mahindra's growing AI and agentic capabilities, including its AI CoE and Agentforce and Data Cloud skills, show momentum in embedding AI into build phases (use case libraries and data activation) to reduce rework and accelerate value."

Ashwin Gaidhani and Megha Dodke

Overview

Tech Mahindra is headquartered in Pune, India. It has more than 149,600 employees across over 90 countries. In FY25, the company generated $6.4 billion in revenue. Tech Mahindra delivers Salesforce professional services, spanning business process consulting, roadmap development and multicloud implementation, supported by a CoE, SF Prime phased rollouts, proprietary migration tools and integration expertise across APIs and MuleSoft. The company supports these services through a dedicated team of over 3,250 Salesforce practitioners with capabilities across core Salesforce Clouds, Industry Clouds, MuleSoft, and AI led implementations.

Strengths

Industry-aligned multicloud delivery: Tech Mahindra provides end-to-end multicloud delivery across Core Clouds, Revenue Cloud, Salesforce Field Service, Marketing and Commerce, MuleSoft and Industry Clouds, supported by repeatable assets such as Telco Gold Build, Auto CX.Nxt, Utility CX and Care.Nxt. With over 20 global rollouts and more than 500 Sales and Service Cloud implementations, it applies a sector-specific approach to reduce customization and accelerate deployment.

Large, certified workforce with consistent delivery: Tech Mahindra holds more than 8,000 Salesforce certifications and over 3,250 certified associates operating in more than 30 countries with India-based CoEs. It caters to clients across telecom, hi-tech, manufacturing and automotive. A 20 percent onsite and 80percent offshore model standardizes execution, while a Salesforce-run CSAT of 4.97/5 demonstrates consistent outcomes across large transformation initiatives.

Proven multi-country transformations: Tech Mahindra has delivered multi-country programs, involving legacy migration, API-led integration, financial workflows, logistics operations and direct-to-consumer models. Case studies report faster onboarding time, higher digital engagement, improved system accuracy and consistent global processes across over 50 regions, underscoring its capability to execute high-scale, data-heavy, multi-system Salesforce transformations.

Caution

While organic growth fosters strong cultural cohesion, it can slow the acquisition of niche, localized market capabilities. Tech Mahindra must remain vigilant as competitors acquire specialized boutiques to rapidly capture regional market share.

Value Realization and Optimization Services

Who Should Read This Section

This report is valuable for providers offering **value realization and optimization services** in the **U.S.** 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.

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

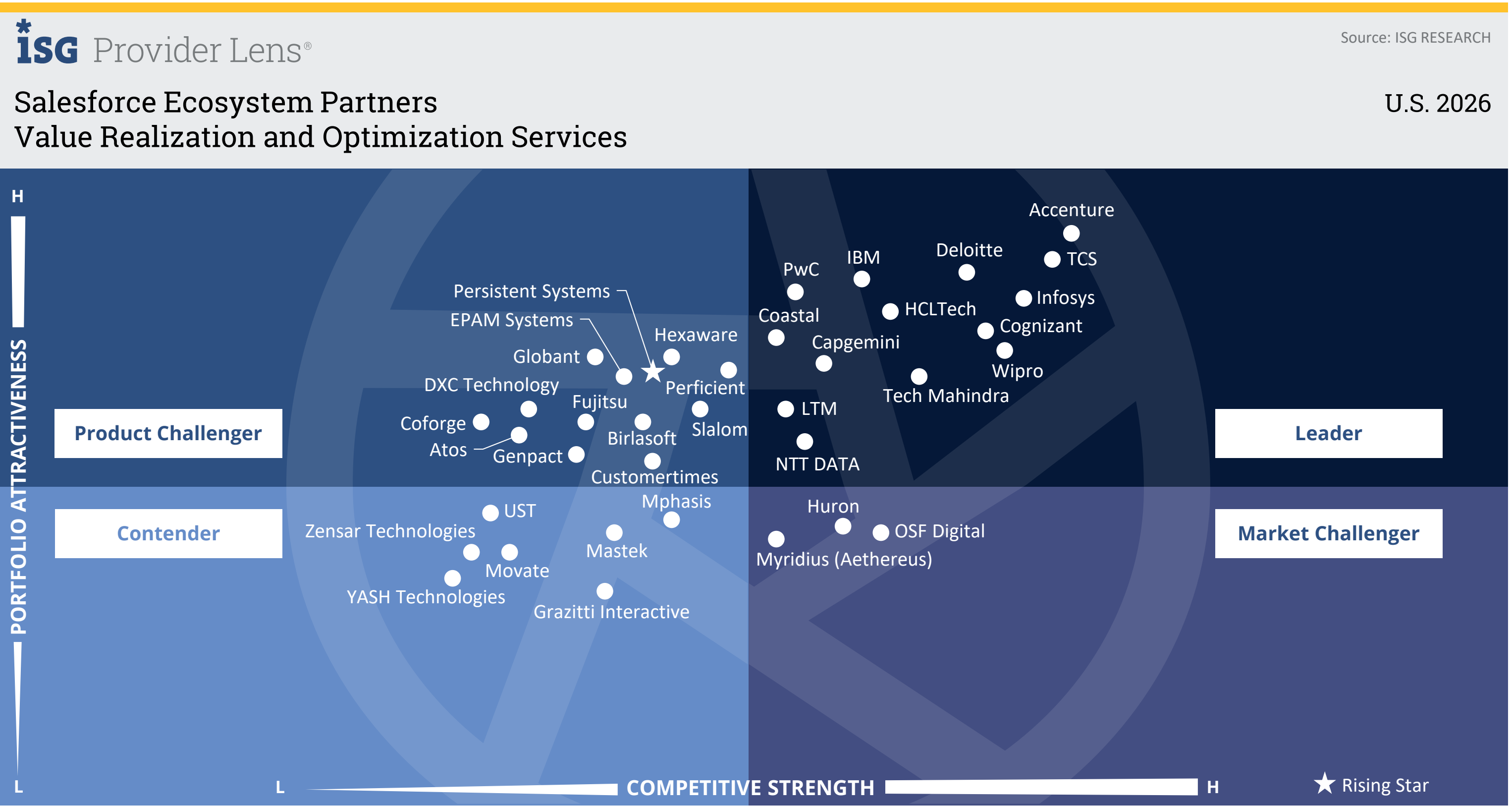
Should read this report to explore strategies for maintaining data integrity and compliance while optimizing Salesforce performance. The report explains how managed services and AI-driven monitoring ensure secure, reliable data operations.

Procurement professionals

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

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.



This quadrant assesses the way providers maximize value via **continuous platform modernization and also their** expertise across **FinOps, RiskOps** and **AgentOps** to assure secure and **proactive value realization** for clients.

Ashwin Gaidhani and Megha Dodke

Definition

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

Providers use managed services capabilities to continuously optimize 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), modernizing 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 optimization** services
2. Evidence of an approach focused on continuous value realization and impact and business value optimization, **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 modernization**, ensuring continuous alignment with Salesforce releases and future-proofing client environments
5. Capacity to manage and optimize 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.,procureto-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 specialized practice focused solely on value realization and impact and business value optimization, with **KPIs demonstrating measurable and continuous improvements** in client performance
9. Compelling list of **region-specific use cases and references**

Observations

The value realization and optimization services market is undergoing a radical change, abandoning reactive break-fix constructs in favor of highly proactive, catalog-based Business Process as a Service (BPaaS) models. At the forefront of this shift is the emergence of AI-native operations, commonly termed AgentOps. Application management teams are actively deploying sophisticated AI observability tools and L1/L2 auto-remediation playbooks for mitigating, instead of only managing, technical debt. In this context, support SLAs have fundamentally transformed into comprehensive, outcome-based charters.

Modern metrics no longer just track system uptime; they rigorously measure user adoption, case deflection rates, CX and overall cost-to-serve parameters. Additionally, operational frameworks such as FinOps, RiskOps and GreenOps are now standard components of quarterly governance cycles. Another critical development is the repositioning of Data Cloud, which is no longer viewed strictly as an implementation project but as a continuous managed service, requiring ongoing data quality assurance, real-time segmentation and analytics activation. In addition, continuous modernization and structured release-cycle change management are treated as permanent, standard workstreams to prevent the burden of legacy customizations.

Commercially, application management services (AMS) take the lead in adopting innovative financial structures, with a visible tilt toward fixed-price and outcome-based models, with some portfolios approaching an eighty percent fixed-price mix, successfully aligning partner revenues directly with sustained ROI.

From the 40 companies assessed for this study, 37 qualified for this quadrant, with 14 being Leaders and one a Rising Star.

accenture

Accenture's managed services find differentiation through business operations at scale. While its competitors focus on technical ticket resolution, Accenture integrates Salesforce operations with its global delivery network to manage entire business processes such as lead-to-cash.

Capgemini

Capgemini's AMS model integrates AI-powered automation (boosted by its acquisition of Cloud4C and WNS) with deep industry insights, transforming the function of platform maintenance into a continuous process of enabling business innovation and agentic readiness.

Coastal

Coastal refers to its Salesforce managed services and value realization offering as Waves. Through this offering, it provides proactive advisory services, identifies next-step use cases and undertakes free-of-cost system scans to remediate technical debt across Salesforce clouds.

cognizant

Cognizant utilizes market-leading integration frameworks such as MuleSoft In-a-Box and Data 360 to ensure the stability of sprawling enterprise architectures. It continuously upskills its vast talent in GenAI, driving proactive, outcome-based operations, deeply focused on business value optimization and significant technical debt reduction.

Deloitte.

Deloitte's Operate portfolio and cloud managed services integrate GenAI into AMS for proactive incident handling, cost optimization and agility. OpenCloud and integrated runbooks accelerate remediation and release across hyperscalers and Salesforce estates.

HCLTech

HCLTech utilizes its proprietary ForceCare framework to transform traditional support into an automated and intelligent AMS. Harnessing predictive AIOps and innovative commercial models, it effectively shifts operations from reactive troubleshooting to proactive performance monitoring, ensuring continuous experience-centric business outcomes and stability.

IBM

IBM leads the market in managing zero-copy architectures. As an MSP, it specializes in maintaining secure, real-time data connections between Salesforce Data Cloud and external data lakes, such as Snowflake or BigQuery, ensuring robust AI agents for clients without the costs and risks associated with physical data migration.

Infosys

Infosys enables significant operational cost reductions across insourced, outsourced and hybrid AMS engagements. By facilitating aggressive vendor consolidation and replacing legacy code with automated AI operations, it continuously reduces platform TCO.

LTM

LTM ensures delivery across the U.S. through nearshore centers in South Africa, Costa Rica, Mexico City and Madrid and can localize SLAs and governance while maintaining a price-performance ratio. Its diversified portfolio across industry verticals reduces dependency risk on any one vertical and supports consolidation and release standardization worldwide.

NTT DATA

NTT DATA utilizes AI-driven monitoring tools to foster self-healing in AMS. Its systems can automatically identify and resolve common configuration errors and performance bottlenecks before they impact end-users, significantly reducing downtime and manual ticket volume for global enterprises.

pwc

PwC leverages its deep consulting and auditing heritage to provide rigorous RiskOps, compliance tracking and platform performance monitoring. These capabilities are particularly critical for optimizing managed services in highly regulated industries worldwide.

TCS TATA CONSULTANCY SERVICES

TCS utilizes a proprietary iR2D framework for Salesforce to drive cognitive automation and intelligent monitoring. It not only fixes bugs but also actively generates code and training content to prevent recurrence through its ticket analyzer and intelligent monitoring capabilities.

TECH mahindra

Tech Mahindra offers flexible Support-as-a-Service operational frameworks, focusing on proactive data-driven business value optimization, rigorous performance monitoring and continuous technical debt reduction for mission-critical global systems.

wipro

Wipro differentiates itself through its *Agile Platform Evolution via the Next Gen Thrive* approach. It goes beyond traditional ticket resolution and uses AI-driven automation and liquid pods to proactively optimize the digital core, showing a shift in focus from maintenance to continuous innovation and business-aligned value.

Persistent

Persistent Systems (Rising Star), in the past year, has expanded Agentforce-enabled AMS patterns, such as case deflection and integration monitoring, codifying ROI communication via a value creation/ realization framework.

Tech Mahindra

Leader

"Tech Mahindra uses Agentforce for real-time observability, automated case handling, knowledge generation and data-quality monitoring, with AI agents detecting issues early, streamlining triage and improving resolution accuracy to reduce operational load and enhance platform reliability."

Ashwin Gaidhani and Megha Dodke

Overview

Tech Mahindra is headquartered in Pune, India. It has more than 149,000 employees across over 90 countries. In FY25, the company generated $6.4 billion in revenue. Tech Mahindra's value realization and optimization services define metrics and benefits through dashboards and scorecards, drive optimization through health checks and license rationalization, and combine financial optimization (FinOps) with governance and compliance (RiskOps) to position optimization as a strategic lever. The company further strengthens its managed services capabilities through AI driven monitoring, AgentOps led automation, and continuous optimization frameworks designed to improve platform performance and reduce operational overhead.

Strengths

Mature AMS portfolio and structured operating model: With over 200 active AMS customers, Tech Mahindra provides support as a service and delivery as a service across L1-L3, enhancements, health checks, Lightning upgrades and modernization. CoEs in Marketing Cloud, Commerce, CPQ, Field Service, Integration and Analytics ensure specialist capability, sustaining stable run operations across telecom, manufacturing, BFSI and healthcare clients.

KPI driven run governance: Tech Mahindra's run operations use standard frameworks, such as quote to order and issue to resolution/prevention, supported by SLA dashboards and DevOps and Agile release cycles. Programs demonstrate improved time to market, higher service accuracy and improved agent productivity, shifting clients from reactive support to predictable, metrics-driven Salesforce operations.

Integration of Agentforce and Data Cloud into AMS: Tech Mahindra's dedicated data activation team and AI CoE, comprising over 1,300 AI associates, more than 600 Agentforce specialists and over 200 Data Cloud consultants, automate case triage, summarization, routing, duplicate checks and knowledge creation. Embedding Agentforce and Data Cloud foundations into AMS accelerates resolution times, improves organizational hygiene and frees delivery capacity for enhancements.

Caution

Operating a large-scale support engine is a notable strength for Tech Mahindra; however, it must guard against service commoditization by strengthening its market narrative around proactive technical debt reduction and value engineering to differentiate from standard, low-cost BPO providers.

Innovation on Salesforce/ Agentforce

Who Should Read This Section

This report is valuable for service providers offering **innovation on Salesforce/Agentforce** in the **U.S.** 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 and application development professionals

Should read this report to learn about Salesforce's latest features, functions and integration options. It explains how service providers build and deploy GenAI and agentic AI workflows using low-code platforms and vibe coding to deliver advanced enterprise solutions that enhance agility and drive measurable business impact.

Salesforce CoE leads

Should read this report to assess partners that enable them to become knowledge hubs for best practices, governance and specialized expertise. The right partner helps stakeholders develop new organization-specific solutions, optimize talent and accelerate Salesforce adoption.

Research and innovation leaders

Should leverage this report to understand how service providers are driving the adoption of advanced Salesforce platform capabilities to enable future growth. It also highlights how providers differentiate themselves by developing targeted solutions and implementing Salesforce's AI platform, Agentforce, to enhance enterprise agility and deliver competitive advantage.

Technology leaders

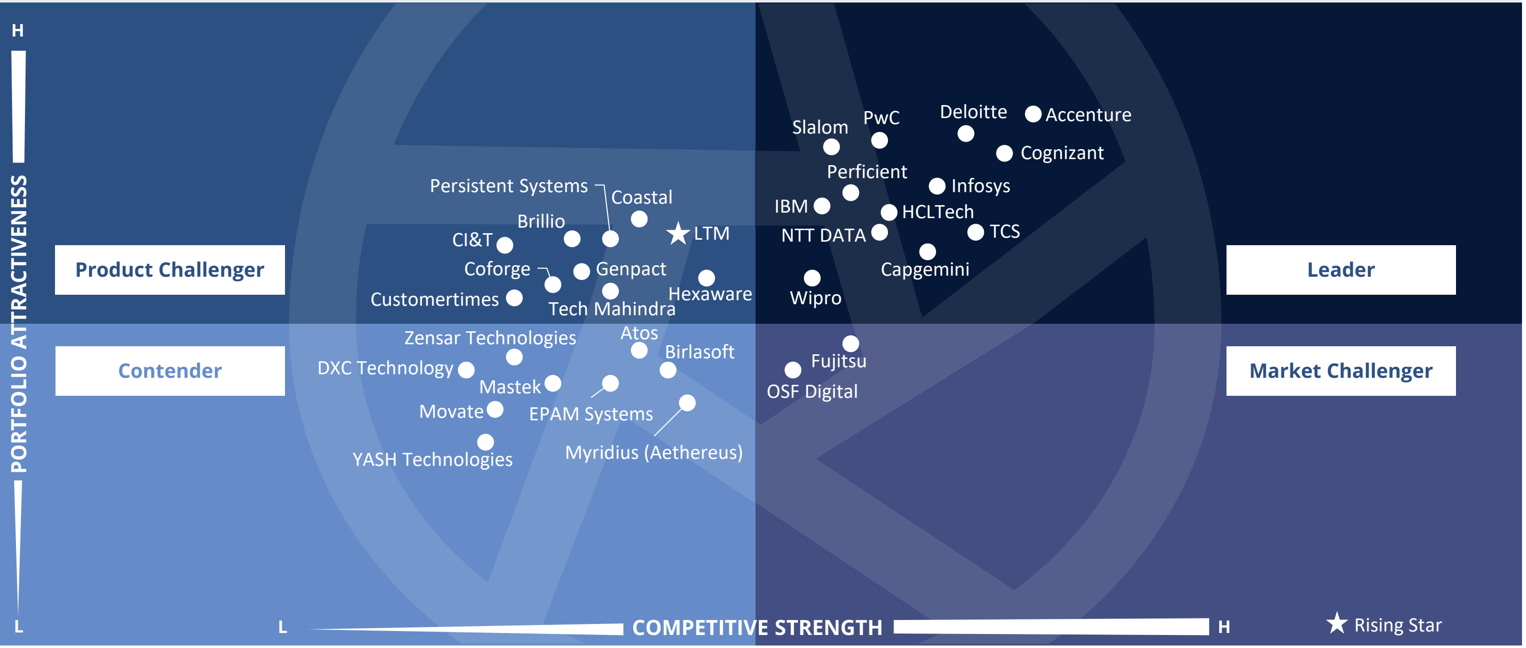
Such as CTO, CDO and CIO, should read this report to select or benchmark best-fit Salesforce partners capable of providing omnichannel, agentic experiences at scale through reliable models and unified data foundations. This report assesses the partners' ability to build credible and secure custom AI agents, predictive journeys and autonomous workflows and conversant with Flow, Slack and MuleSoft.

ISG Provider Lens

Source: ISG RESEARCH

Salesforce Ecosystem Partners
Innovation on Salesforce/Agentforce

U.S. 2026



This quadrant assesses providers for ability to design custom **Agentforce 360 solutions** to operationalize the **Agentic Enterprise, as well as** their mastery over **Data 360** and the **Trust Layer** to deliver **safe autonomous AI experiences**.

Ashwin Gaidhani and Megha Dodke

Definition

The Innovation on Salesforce/Agentforce quadrant assesses providers on their ability to design, build, deploy and govern transformative, custom solutions on Agentforce 360 that operationalize the Agentic Enterprise model. The objective is to deliver AI experiences that are personalized, predictable and safely autonomous, measured by real outcomes in customer and employee workflows.

Success in this quadrant requires mastery of Agentforce 360 platform build and run and integration capabilities such as the Agentforce Trust Layer, Agentforce Builder for conversational development, Agent Script and the Atlas Reasoning Engine for hybrid reasoning and guardrails, Intelligent Context and Tableau in Data 360 to ground agents in enterprise truth, and Slack and Agentforce Voice to activate agents across channels.

Providers should be able to orchestrate Agentforce 360 Apps (e.g., Agentforce Sales, Service, IT Service) and extend them with Flow, MuleSoft and APIs to the broader estate.

Eligibility Criteria

1. Demonstrated **unification and activation of enterprise data in Data 360**, including **semantic modeling** and the use of **Intelligent Context for unstructured content**
2. Portfolio of custom agents and extensions created with **Agentforce Builder, Agent Script**, hybrid reasoning patterns and **policy guardrails** through the **Einstein Trust Layer**
3. Proof of **autonomous workflows** spanning Customer 360 Apps, Slack, web and Voice, with measured KPIs such as case deflection and time-to-resolution
4. Proficiency across **Flow** and pro-code (Apex and APIs), plus **MuleSoft** integration to connect third-party systems
5. Evidence of Slack-first unified experiences and safe multichannel deployment within enterprise controls
6. Ability to apply **model choice via the Trust Layer and partner models**, and to align with Salesforce's AI ecosystem strategy
7. Compelling, **referenceable industry agents** and use cases, leveraging Agentforce 360 for Industries
8. Compelling list of **region-specific use cases and references**

Observations

The Salesforce ecosystem has evolved past rudimentary conversational copilots, decisively entering the era of supervised autonomy and complex agentic AI. Leading service providers are rapidly establishing sophisticated agent factories and advanced orchestration layers to construct tailored and powerful domain-specific autonomous agents for intricate sales, service and risk operations. In this context, reliable and data-grounded AI architectures have become a necessity. The market understands that Agentforce is ineffective without deep integration with Salesforce Data Cloud.

Consequently, AI innovations are being stringently wired to govern, first-party data, and protected by robust privacy-by-design principles, ethical controls and comprehensive audit trails to meet the rigorous demands of highly regulated industries. Furthermore, the proliferation of industry-specific agents is accelerating rapidly. The market is witnessing concrete, production-grade use cases, such as automated insurance underwriting, proactive healthcare patient operations and frictionless banking KYC, thereby moving swiftly from isolated pilots to full-scale enterprise deployments.

Providers are also pioneering hybrid bring your own model architectures, fusing Salesforce Einstein with proprietary partner large language models (LLMs) to optimize complex task routing and AI explainability. Finally, innovation is being heavily commercialized through accelerator-led delivery. By leveraging pre-built prompt packs, agent lifecycle observability dashboards and rapid migration toolkits, providers are dramatically compressing time-to-value and proving the criticality of AgentOps.

From the 40 companies assessed for this study, 34 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

Accenture co-develops native solutions, such as Life Sciences Cloud, directly with Salesforce. By leveraging its GenAI hub and proprietary assets such as AI Refinery, it delivers pre-configured, industry-specific agentic architectures that ensure faster time-to-value than that achieved from custom-built offerings.

Capgemini has pivoted its entire Salesforce practice toward an *agentic* future, focusing on Salesforce Agentforce. It is focused on embedding autonomous AI into core sales, services and marketing workflows.

Cognizant is playing a prominent role in the current AI economy, with a strong presence in the use of Agentforce for Healthcare. By driving massive Agentforce consumption credits across the Americas, it rapidly deploys sophisticated, production-grade autonomous agents by using proprietary, data-centric frameworks such as Unified Customer Hub and OmniServe Next.

Deloitte, through its agentic services and life sciences use cases, demonstrates its growing maturity from pilots to scaled value. Its differentiators include Trustworthy AI™, industry depth and repeatable accelerators that link data, workflow and agents to measurable outcomes.

HCLTech rapidly scales advanced autonomous AI through its proprietary InFusion GenAI Solution Suite, featuring 18 industry-specific solutions, while strategically co-innovating alongside Salesforce as an exclusive Gen-AI Advisory Board member.

IBM builds *data spaces* for its clients in industries such as defense and healthcare, where Agentforce can read sensitive mainframe data without it leaving the secure IBM cloud environment. This is a significant differentiator for organizations with exacting data privacy requirements.

Infosys vastly accelerates enterprise AI readiness by leveraging a massive repository of over 200 identified AI use cases and more than 150 pre-built agent actions. This industrialized approach ensures rapid deployments of specialized autonomous agents tailored to specific industries.

NTT DATA

NTT DATA's Smart AI Agent™ ecosystem and EvangelizePilotAdoptScale (EPAS) model derisks adoption and scales interoperable agents. At the same time, M&A (such as that with EXAH in Oct 2025) augments AI/Salesforce talent and IPs.

Perficient

Perficient is a trusted Salesforce partner with over 15 years of experience, specializing in AI-powered transformations, CRM, data and personalization, and primarily serving Fortune 1000 companies. Its practice encompasses approximately 500 Salesforce professionals with more than 1,600 certifications.

pwc

PwC has more than 940 Agentforce specialists, which enables it to leverage the scale and technical depth needed to architect, orchestrate and govern highly sophisticated agentic AI solutions for global corporations.

Slalom

Slalom's technical prowess in Snowflake and AWS, along with Salesforce, makes it a premier partner for data-heavy Salesforce transformations, where CRM must act as an intelligent layer over a modern data stack.

tcs TATA CONSULTANCY SERVICES

TCS aligns with Salesforce's AI-driven roadmap, integrating Agentforce-ready architectures into its Crystallus industry solutions and actively participating in major Agentforce events, reflecting sustained investments in autonomous-agent and data-centric transformation models.

wipro

Wipro specializes in *agentic autonomy*," creating intelligent ecosystems of collaborating agents beyond simple chatbots. By integrating proprietary AI readiness assessments and innovation studios, it delivers domain-specific AI models that foster autonomous enterprise functions globally, ensuring rapid, high-impact innovations.

LTM

LTM (Rising Star) has been recognized with five Partner Innovation Awards across industries and cross-cloud. Its 360° alignment with clients includes executive connects, OSP agreements, joint GTMs and regional enablement. This strategy is useful for navigating platform pivots, involving, among others, Data Cloud, RCA and Marketing Cloud Advanced.

Appendix

The ISG Provider Lens® 2026 – Salesforce Ecosystem Partners study analyzes the relevant software vendors/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.

Study Sponsor:
Heiko Henkes

Lead Authors:
Ashwin Gaidhani and Megha Dodke

Editors:
Dona George, Ipshita Sengupta and Sajina B

Research Analyst:
Riya Tomar

Data Analyst:
Lakshmikavya Bandaru

Project Manager:
Yeshashwi Nagarajan Chintamani

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of, Information Services Group Inc.

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

Ashwin Gaidhani
Lead Analyst and Research Partner

Ashwin Gaidhani has over 22 years of experience as an SME, advisor, practitioner and researcher in ESM and emerging technologies. He has worked as a global practice leader and an executive-level advisor in ESM, automation and cloud technologies, covering business transformation, ITES & ITIS, AIOps, CloudOps, metrics-driven practices.

As an ISG Lead Analyst and research partner for studies related to hyperscalers such as AWS and Google, ESM services and platforms, and intelligent automation, he defines and leads the ISG Provider Lens™ research projects for the markets in the U.S. and Europe. With his extensive experience in service management, Ashwin has worked in technology operations, business consulting and advisory roles for large Global System Integrators (GSIs), independent software vendors (ISVs) and technology services companies.

He is highly qualified and experienced in offering guidance on technology practice adoption across industries such as BFSI, manufacturing and retail.

Lead Analyst

Megha Dodke
Lead Analyst

Megha Dodke joined ISG as a Research Specialist in October 2024. Based in Bangalore, India, she holds a Master's degree in Marketing and a certification in Product Strategy from the Indian Institute of Management, Kozhikode (IIM-K). Megha brings over 12 years of diverse experience in Business Research, Market and Competitive Intelligence, Sales Enablement, and Strategic Advisory across multiple industry verticals.

At ISG, Megha focuses on enterprise platform research, with a specialization in areas such as Enterprise Service Management (ESM), ServiceNow, Salesforce and Workday. She has a strong track record of conducting in-depth research and analysis on emerging technologies, market dynamics, and the capabilities of IT service providers—including consulting, managed services, implementation, and innovation.

Her work supports clients through strategic advisory, briefings, workshops, and consulting engagements. Prior to this, she has worked with organizations including HP Inc., Accenture, Talent Neuron and Transparency Market Research.

Research 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.

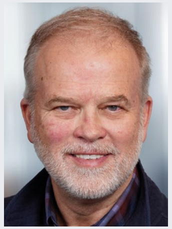
Study Sponsor

Heiko Henkes
Director and Principal Analyst

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads 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 known for his contributions as a keynote speaker on digital innovation, sharing insights on using 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.

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™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

APRIL, 2026

REPORT: SALESFORCE ECOSYSTEM PARTNERS