

RADAR

Salesforce-Related Services in Europe: The Manufacturing View

SITSI® | Vendor Analysis | PAC RADAR



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TABLE OF CONTENTS

Introduction	4
SALESFORCE IN EUROPEAN MANUFACTURING	5
PAC INNOVATION RADAR "SALESFORCE-RELATED SERVICES in Europe 2024"	6
Vendor Analysis: Reply Group	7
Objective of the PAC RADAR	9
PAC RADAR Evaluation Method	10
Provider selection & participation	10
Considered providers by segment	11
The concept	12
PAC RADAR Report License	13
About the PAC RADAR	14
About PAC	14

TABLE OF FIGURES

Fig. 1: PAC INNOVATION RADAR "Salesforce-related Services in Europe"	6
Fig. 1: PAC RADAR graph (exemplary presentation)	9
Fig. 2: PAC INNOVATION RADAR graph (exemplary presentation)	9
Fig. 3: PAC RADAR – evaluation method	12

DOCUMENT INFORMATION

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Related reports: This document is part of a series of 6 PAC RADAR reports.

INTRODUCTION

Salesforce's European business has been out-growing its North American division in recent quarters. Revenue from Europe reached \$7.2bn in the vendor's most recently reported fiscal year, driven by the expansion of its core portfolio and customers adopting its propositions to support increasingly critical areas of their business.

Salesforce is planning to invest to drive further momentum in the region. The vendor unveiled plans to invest \$4bn in its UK business alone over the next five years. This will be channelled into "innovation, customer success and growth," and helping customers harness the company's increasingly AI-centric approach. Similar funding initiatives are expected in other key European markets, including France and Germany. Some of this investment will also help to reinforce Salesforce's partner ecosystem, which continues to play a hugely important role in driving Salesforce's client success in the region. PAC research

This has created a major opportunity for its partner ecosystem, which incorporates more than 500 advisory, implementation and development partners in the region. PAC expects European businesses to increase their spending on Salesforce-related consulting and systems integration from €8bn in 2023 to €13bn in 2027.

Salesforce relies on services partners to accelerate its customers' time to value and to help them harness the vendor's growing importance at the heart of their business.

But a key part of the role of Salesforce partners is to help join the dots between the platform and the specific needs of the client and the industry in which they operate. As business become more digital-centric, they need assistance in building platforms and services that support and enhance the critical moving parts of their organization.

PAC estimates that more than 50% of major Salesforce projects now require the services

provider to have industry domain-specific knowledge or experience or in working their vertical market. This is because customers are increasingly using Salesforce's expanding platform to support critical aspects of their digital-centric operations.

Salesforce has responded to this through the introduction and expansion of the Salesforce Industries and industry cloud propositions, as well as the launch of an advisory board for its EMEA operation that included executives with experience of leading market-leading organizations including Aegon, Beiersdorf, BMW, Publicis SNCF and Siemens.

This study aims to provide enterprise buyers across Europe with the insights they need to shortlist the right partners for their Salesforce investments, with analysis focusing on the overall capabilities of major providers in the region. In addition, the study will present analysis of the differentiators and specific capability of leading firms in the market, in line with shifting enterprise priorities and the evolution of new buyer groups. In particular, the research will examine a provider's ability to deliver services that cater to the unique demands of specific industry sectors

SALESFORCE IN EUROPEAN MANUFACTURING

Europe's manufacturing organizations are going through a period of unprecedented change and disruption.

Huge pressures on global supply chains, the need to accelerate time to market while meeting constantly changing customer needs, and new demands in terms of sustainability are driving major transformation programmes across all areas of the sector.

In markets such as automotive manufacturing, companies are having to completely reinvent their product strategies and supporting supply chains and partner ecosystems as they pursue aggressive targets in vehicle electrification.

In the CPG space, brands are under more scrutiny than ever before to provide clear insight to customers and regulators on the working practices and emissions footprint of their products, from source through to sale.

As a result, many organizations in this sector are looking to put data at the heart of their day-to-day operations. However, decades of dependence on fragmented ERP application estates makes this a difficult task.

Salesforce has made good progress over the last decade in helping European manufacturers transform key aspects of their day-to-day operations such as sales and marketing management, field service optimization, and production systems and asset management.

It remains early days for Salesforce's manufacturing cloud proposition in Europe, and this is one area where it will work closely with its consulting and IT services partner ecosystem to build the necessary bridges to meet the client's specific requirements.

In this report, we map out those IT services organizations that combine the deep industry domain knowledge and expertise with experience in supporting Salesforce's expanding portfolio in the European manufacturing sector.

Selected Key Salesforce Accounts in the European Manufacturing Sector



PAC INNOVATION RADAR “SALESFORCE-RELATED SERVICES IN EUROPE 2024”

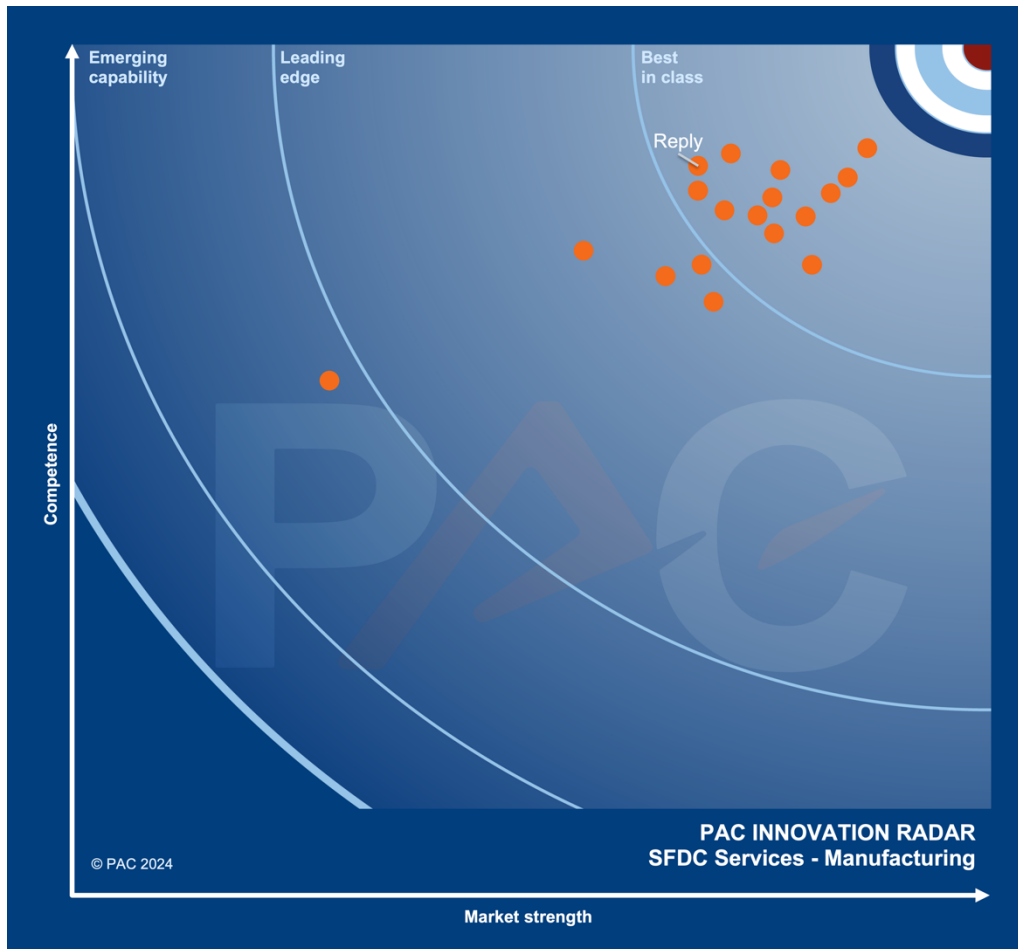


Fig. 1: PAC INNOVATION RADAR “Salesforce-related Services in Europe”

Based on the scores in competence and market strength, the overall score is calculated (calculation: competence score plus market strength score, divided by two). From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

The classification of providers is based on the overall score:

“Best in Class”	1.0 – 1.9
“Leading Edge”	2.0 – 2.9
“Emerging capability”	3.0 – 3.9

PAC INNOVATION RADAR – Salesforce Services in Europe 2024

The Manufacturing View

Key Strengths (Industry Specific)

- **Partner recognition.** Reply has a strong reputation in the Manufacturing sector as a Salesforce partner, having achieved the highest level of "Expert" and being named as one of only eight global partners with the "Expert" level specifically in the Automotive Sector. Reply has been designated as one of the few "Automotive Cloud" launch partners.
- **Multi-cloud experience.** In many projects, the provider supports its multi-cloud solutions, which are based on a customer 360-degree approach to the complete customer view and process flow with the customers - from lead generation / CRM to offer generation, contract creation, customer service and marketing campaigns.
- **High-profile customer journeys.** Reply's Salesforce customers in the manufacturing sector were showcased on stage as reference customers at several events during the past year, including the paper producer Mercer with the service solution at the Salesforce World Tour in Munich. At the Salesforce World Tour in London, both Aston Martin and Daimler Benz UK reported on their Salesforce solutions and discussed the role of Arlanis Reply as an implementation partner. Another reference customer is the international seed producer KWS, based in Germany, for whom Arlanis Reply developed a unified global Salesforce CRM system and rolled it out to subsidiaries in 30 countries.
- **Strong automotive focus.** Another recent client engagement saw Reply work with a client within the automotive industry that wanted to expand its marketing automation activities to create a better experience for their customers. The company was looking for a single platform for marketing activities across different brands and markets that would also be compatible with the existing Salesforce Sales Cloud software. Arlanis Reply helped the client to leverage CRM master data from Sales Cloud to personalize its marketing content to communicate more effectively with its customers.
- **Domain focus areas.** Reply offers clients business and technical advice and support to understand how they can optimise their current processes. In addition to CRM, other areas of focus include field sales, marketing and B2B commerce. In the meantime, the first eCommerce projects with Commerce Cloud, e.g. for the B2C area for automotive, are also being implemented.
- **Depth of proposition.** Reply's core Salesforce proposition for the manufacturing sector spans: consulting, project management and (multi-cloud) implementation & digital transformation; Automotive Cloud implementation; architecture consulting and integration; and managed application services. The company is also able to leverage a broad base of expertise across its group operations including business planning and case development, defining processes and business requirements, market analysis of suitable products, solution design, configuration and build, quality testing, deployment and integration and end-user training.

Key Strengths (Industry Specific)

- **AI focus.** Looking ahead, Reply is well prepared for the newly announced Salesforce GPT product enhancements and started implement the first Salesforce GPT applications in a very short time.

Key Strengths (General)

- **A growing force.** Reply is one of the fastest growing IT services providers in the world, more than doubling its global revenue over the last five years to €1.9bn, with its headcount growing at a similar level to reach more than 14,300 employees worldwide. The company works with its clients to optimize and integrate processes and applications, and supports them in defining and developing strategies and new business models. Reply combines specific sector expertise across eight core markets with wide experience in the provision of consulting, applications and technology infrastructure services.
- **Balanced structure.** Reply's structure is based on harnessing a network of specialist companies, which allow it to strike a balance between the agility of a small service partner with the resourcing and economies of scale benefits of an international corporation.
- **Salesforce focus.** The company's Salesforce capabilities are centered around the Arlanis Reply division, which is dedicated to Salesforce consulting and services. As one of the first Salesforce pioneers in Europe, Arlanis can look back on a Salesforce partnership dating back to 2005, demonstrating its extensive experience in the Salesforce ecosystem. Other Reply companies manage Salesforce projects with their specific industry focus (e.g. Retail Reply, Power Reply) or expertise (e.g. Glue Reply for architecture and integration with Mulesoft, Like Reply for marketing automation, Blue and Target Reply for BI analysis using Tableau). All of them work together very closely and in a coordinated way. For global coordination and central Salesforce Partner Program organisation there is a dedicated Global Salesforce Alliance Manager.
- **Salesforce experience.** Reply has been a Salesforce partner since 2005, when it became one of the first Salesforce partners in Germany and Italy, and continuously maintains Summit Partner status. Since 2023, Reply has been selected by Salesforce as one of the "EMEA Strategic Partners", engaging across individual regions throughout Europe and driving strategic and innovative topics with Salesforce. The company has more than 500 Salesforce experts supporting clients in the region (with more than 850 Salesforce certifications) and has experience of delivering more than 500 Salesforce projects. The company has an average project rating of 4.9 out of 5.0 from clients and has built up a network of six competence centers across the region.
- **Expansion mode.** Reply continues to bolster its Salesforce capabilities through both recruitment and through its M&A strategy. In October 2022, the company acquired France-based Wemanity, an agile and digital transformation specialist, which also brings a team of integration specialists and Mulesoft experts, expanding Reply's Salesforce & Mulesoft expertise in France.

OBJECTIVE OF THE PAC RADAR

What is the PAC RADAR?

The PAC RADAR is an effective tool for the holistic evaluation and visual positioning of software and ICT service providers on local markets. Numerous ICT and business decision-makers in user companies of all industries and company sizes rely on the PAC RADAR when selecting their partners and developing their sourcing strategies. With the help of predefined criteria, PAC evaluates and compares providers' strategies, development, and market position, in addition to their performance and competencies within specific market segments.

Each PAC RADAR focuses on a specific IT market segment. Up to 30 leading providers are evaluated per segment. Participation in the PAC RADAR is free of charge. All providers are evaluated using PAC's proven methodology, which is based on personal face-to-face interviews and a detailed self-disclosure from each provider.

PAC reserves to also evaluate and position relevant providers in the PAC RADAR that do not participate in the self-disclosure process. After the evaluation of the predefined criteria, each supplier's position is plotted in the PAC RADAR. The criteria are classified by clusters and can all be attributed to the "Competence" and "Market Strength" clusters. The provider evaluation, including a market description, is published as a report.

PAC RADAR graph

The PAC RADAR graph is a visual presentation of the results of the provider evaluation with regard to their market strength (horizontal axis) and competence (vertical axis) in the respective analyzed market segment.

The closer a company is to the center, the closer they are to meeting customers' requirements.



Fig. 1: PAC RADAR graph (exemplary presentation)

What is the PAC INNOVATION RADAR?

Concept and methodology of the PAC INNOVATION RADAR are similar to those of the traditional PAC RADAR.

While the traditional PAC RADAR focuses on mature market segments, the PAC INNOVATION RADAR, on the other hand, positions providers in new and innovative market segments, or in specific niche markets.

Thus, the focus of the evaluation is on the portfolio, vision, strategy, and early client engagements rather than on existing revenue numbers and resources

PAC INNOVATION RADAR graph

The PAC INNOVATION RADAR graph is a visual presentation of the results of the provider evaluation.

The closer a company is to the top right corner, the closer they are to meeting customers' requirements.

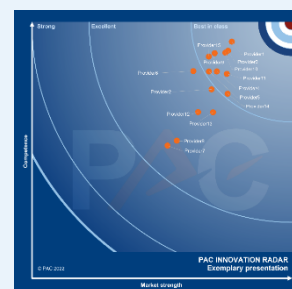


Fig. 2: PAC INNOVATION RADAR graph (exemplary presentation)

PAC RADAR EVALUATION METHOD

Provider selection & participation

Which providers are positioned in the PAC RADAR?

Providers are selected and invited according to the following criteria:

- **Size of revenues** in the segment to be analyzed in the specified region.
- **"Relevance"**: Even providers that do not belong to the top-selling providers in the segment to be analyzed are considered if PAC classifies them as relevant for potential customers, for instance due to an innovative offering, strong growth, or a focus on a specific customer group (e.g., SMBs).

There is no differentiation as to whether the providers are customers of PAC – neither in the selection of the providers to be positioned, nor in the actual evaluation.

What do providers have to do in order to be considered in a PAC RADAR analysis?

The decision as to which providers are considered in the PAC RADAR analysis is entirely up to PAC. Providers do not have any direct influence on this decision.

However, in the run-up to a PAC RADAR analysis, providers can make sure in an indirect way that

PAC can adequately evaluate their offerings and positioning – and thus their relevance – e.g., by means of regular analyst briefings, etc.

Why should providers accept the invitation to actively participate?

Whether or not a provider participates in the RADAR process does not actually affect their inclusion and positioning in the PAC RADAR, nor their assessment. However, there are a whole host of benefits associated with active participation:

- Participation ensures that PAC has access to the largest possible range of specific and up-to-date data as a basis for the assessment.
- Participating providers can set out their specific competencies, strengths, and weaknesses as well as their strategies and visions.
- The review process guarantees the accuracy of the assessed factors.
- Submitting customer assessments can have a positive impact on the overall score.
- The provider gets a neutral, comprehensive, and detailed view of their strengths and weaknesses as compared to the direct competition – related to a specific service in a local market.
- A positioning in the PAC RADAR gives the provider prominence amongst a broad readership as one of the leading players in the segment under consideration.

Considered providers by segment

Communications & Media	Energy & Utilities	Financial Services	Manufacturing	Public Sector	Retail
<ul style="list-style-type: none"> • Accenture • Bearing Point • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • NTT Data • Reply • TCS • Telekom MMS • Wipro 	<ul style="list-style-type: none"> • Accenture • Bearing Point • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Wipro 	<ul style="list-style-type: none"> • Accenture • BearingPoint • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Wipro 	<ul style="list-style-type: none"> • Accenture • BearingPoint • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Tietoenvy • Wipro 	<ul style="list-style-type: none"> • Accenture • BearingPoint • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • Nextview • NTT Data • PwC • Reply 	<ul style="list-style-type: none"> • Accenture • Capgemini • CGI • Deloitte • IBM • Merkle • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Tietoenvy • Wipro

The concept

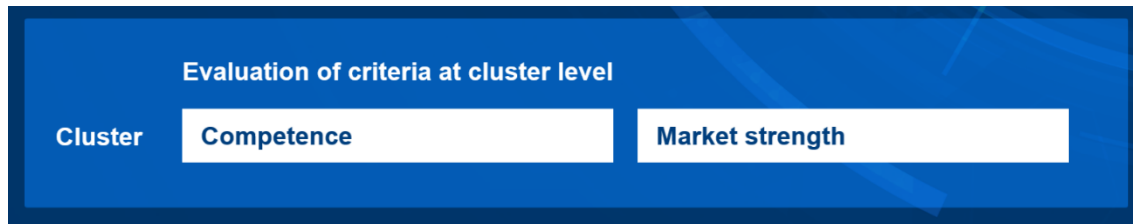


Fig. 3: PAC RADAR – evaluation method

PAC uses **predefined criteria** to assess and compare the providers within given service segments. The assessment is based on the report-card score within the peer group of the positioned providers.

This is based on:

- The provider's detailed self-disclosure about resources, distribution, delivery, portfolio, contract design, pricing, customer structure, customer references, investments, partnerships, certifications, etc.;
- An assessment of the provider by reference customers (to be obtained by the provider);
- If applicable, a poll among customers by PAC;
- The analysis of existing PAC databases;
- Secondary research;
- Dedicated face-to-face interviews as relevant.

The provider data is verified by PAC and any omissions are rectified based on estimates.

If the provider does not participate, the assessment is performed using the proven PAC methodology, mainly based on:

- Information obtained from face-to-face interviews with the provider's representatives, analyst briefings, etc.;
- An assessment of company presentations, company reports, etc.;
- An assessment of PAC databases;
- An assessment of earlier PAC RADARs in which the provider participated;
- A poll among the provider's customers (as required) on their experiences and satisfaction

What if no customer assessments, or fewer than required, are submitted?

The overall assessment has to include the number of customer assessments requested in the invitation. Any missing customer assessments are scored as "satisfied," i.e., they do not negatively affect the score. This produces an average score for criteria based on customer assessments

Reissue of published RADARs

The scores in the PAC RADAR represent an assessment of the providers within the given peer group in the year in which the respective PAC RADAR was published.

The evaluations may not be directly comparable with those of any previous version due to subsequent content modifications. In particular, they do not depict a development of individual providers over time.

Methodological and/or organizational modifications may be made due to changing market conditions and trends, and may include:

- A different peer group in the focus of the analysis;
- Modification of individual criteria within clusters and sub-clusters;
- Increased or altered expectations by user companies;
- Adjustment of the weighting of individual criteria.

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PAC RADAR "Salesforce-related Services in Europe 2024"

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ABOUT THE PAC RADAR

The PAC RADAR is protected by Pierre Audoin Consultants (PAC) Ltd. copyright.

The PAC RADAR is a graphical representation and written analysis of the positioning of various IT providers within a defined market segment at a specific point in time. The positioning and characterization of selected companies within the PAC RADAR is conducted on the basis of an analytical assessment of criteria which PAC previously defined for this analysis.

The selection, positioning, and characterization of companies within the PAC RADAR is not subject to any vested interests whatsoever. PAC does not support any providers that are represented in the PAC RADAR, and does not give any recommendations to technology users. The PAC RADAR represents a result from market research only and must not be taken as a recommendation for action.

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ABOUT PAC

We are a content-based company with a consulting DNA. PAC is the leading European consulting and analyst firm supporting software & IT service vendors worldwide. Since 1976, we have helped our clients to understand market dynamics, grow their revenue and raise their profile. Our unrivalled understanding of European markets, and deep research coverage help key market players to define their strategy, optimize their go-to-market and increase market share. PAC is an analyst-led consultancy with a team of over 100 experts across Europe. We provide market research and analysis on more than 30 countries worldwide, delivered through our portfolio pillars, Guidance, Insights, and Visibility, and our renowned SITSI® research platform.

More on www.pacanalyst.com.

RADAR

Salesforce-Related Services in Europe: The Energy & Utilities View

SITSI® | Vendor Analysis | PAC RADAR



TABLE OF CONTENTS

Introduction	4
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PAC INNOVATION RADAR "SALESFORCE-RELATED SERVICES in Europe 2024".....	6
Vendor Analysis: Reply Group	7
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PAC RADAR Evaluation Method.....	10
Provider selection & participation	10
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The concept	12
PAC RADAR Report License.....	13
About the PAC RADAR.....	14
About PAC.....	14

TABLE OF FIGURES

Fig. 1: PAC INNOVATION RADAR "Salesforce-related Services in Europe".....	6
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SALESFORCE IN EUROPEAN ENERGY & UTILITIES

Europe's energy and utilities sector is battling a perfect storm of challenges.

Geopolitical crises, coupled with rising demand for energy in the post-pandemic era has led to a surge in wholesale oil and gas prices amid rising demand.

This in turn has led to State intervention in the pricing of strategies of utilities in several European countries, the collapse and consolidation of many smaller utility providers, and a renewed focus on how organizations can support their customers over what is set to be an incredibly challenging period.

At the same time, energy and utility organizations are accelerating their journey to low emissions energy sources – partly in response to the ongoing volatility in gas prices, but also to meet the demands of regulators, customers and shareholders in delivering on the Net Zero agenda.

Technology will play a key role in helping organizations to adapt to these market dynamics, and Salesforce has already

emerged as one of the preferred platform providers to enable digital transformation.

Many European energy and utility organizations now leverage Salesforce's core CRM platform to provide a customer-centric view across multiple services. The vendor's field services solutions have also built strong momentum in the space as companies look to transform the experience of their service and asset management teams.

The existing presence of vlocity in the E&U sector gives Salesforce a good platform on which to build with the Industry Cloud proposition, although this is one area where it will work closely with its consulting and IT services partner ecosystem to build the necessary bridges to meet the client's specific requirements.

In this report, we map out those IT services organizations that combine the deep industry domain knowledge and expertise with experience in supporting Salesforce's expanding portfolio in the European energy and utilities sector.

Selected Key Salesforce Accounts in the European Energy & Utilities Sector



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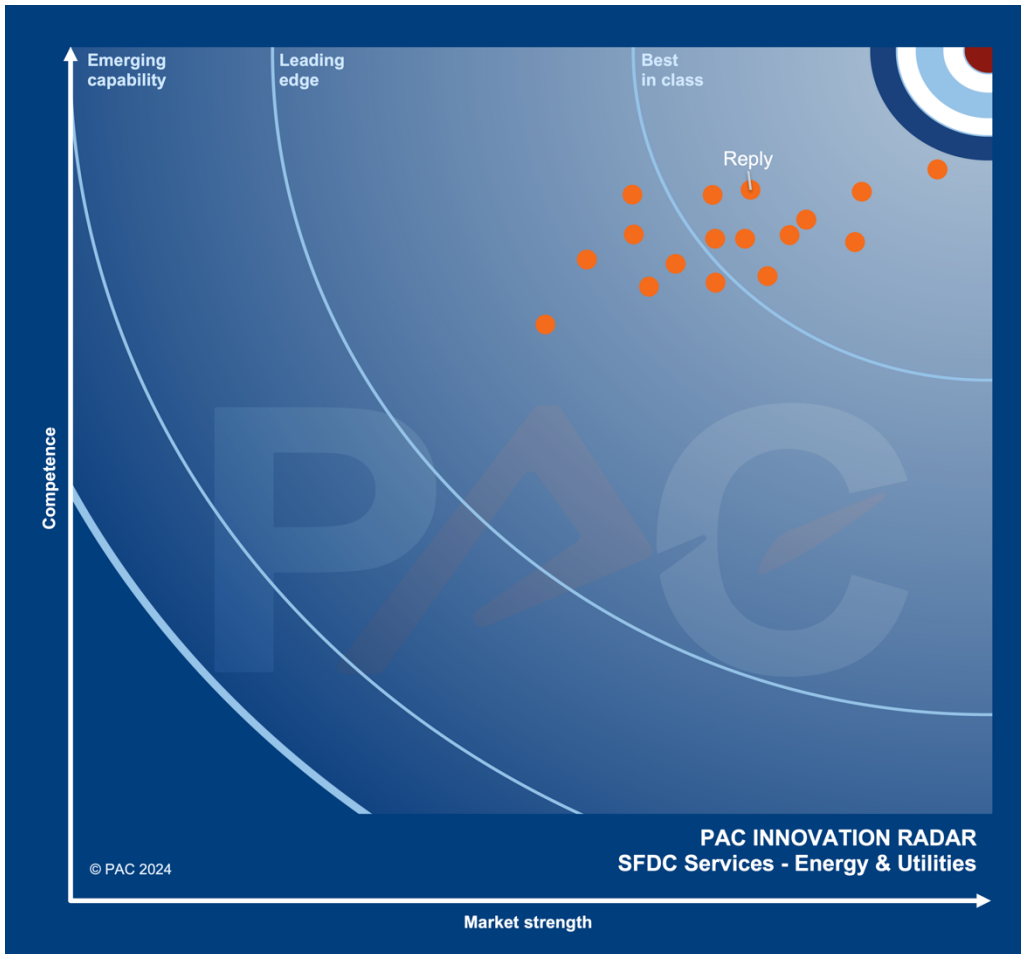


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PAC INNOVATION RADAR – Salesforce Services in Europe 2024

The Energy & Utilities View

Key Strengths (Industry Specific)

- **Domain expertise.** Reply has deep domain expertise in this sector, which brings together more than 300 professionals delivering business and technology transformation programmes for energy and utilities companies in France, Germany, Italy and the UK. In Italy in particular, a large number of Reply's Salesforce customers are in the Energy & Utility sector, which have already been implemented and supported for many years by Reply in cooperation with Power Reply (as a specialist for this industry and Salesforce Field Service module) and Arlanis Reply (as the Salesforce experts). Reply is working with customers in this sector also in Germany around Salesforce, Mulesoft and Tableau.
- **Partner recognition.** Reply has continuous projects in this field and earned a specialist level for Energy sector in "Utilities & Power" for its submitted customer projects supported & special certified experts.
- **Depth of offering.** Reply's core Salesforce proposition for the Energy & Utilities sector spans: consulting, project management and (multi-cloud) implementation & digital transformation; Industry Cloud implementation; architecture consulting and integration; and managed application services.
- **Wider group capabilities.** The company is also able to leverage a broad base of expertise across its group operations including business planning and case development, defining processes and business requirements, market analysis of suitable products, solution design, configuration and build, quality testing, deployment and integration and end-user training.
- **Domain focus areas and use cases.** Core focus areas for Reply's Salesforce practice in this sector include: field service management; CRM and digital channel management; and service design, and customer engagement and experience. Recent use cases in the sector include reducing operational costs (route optimization), improving service quality; reducing response time (Field Service solutions) and improved risk management (real-time asset data management and preventive maintenance).
- **AI focus.** Reply plans to expand its Salesforce proposition in areas such as artificial intelligence and machine learning: customer service/field service; Virtual Remote Assistant; and the Capex Force solution.

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- **A growing force.** Reply is one of the fastest growing IT services providers in the world, more than doubling its global revenue over the last five years to €1.9bn, with its headcount growing at a similar level to reach more than 14,300 employees worldwide. The company works with its clients to optimize and integrate processes and applications, and supports them in defining and developing strategies and new business models. Reply combines specific sector expertise across eight core markets with wide experience in the provision of consulting, applications and technology infrastructure services.
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The PAC RADAR graph is a visual presentation of the results of the provider evaluation with regard to their market strength (horizontal axis) and competence (vertical axis) in the respective analyzed market segment.

The closer a company is to the center, the closer they are to meeting customers' requirements.



Fig. 1: PAC RADAR graph (exemplary presentation)

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Concept and methodology of the PAC INNOVATION RADAR are similar to those of the traditional PAC RADAR.

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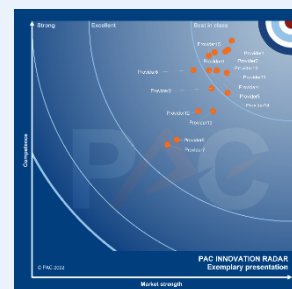


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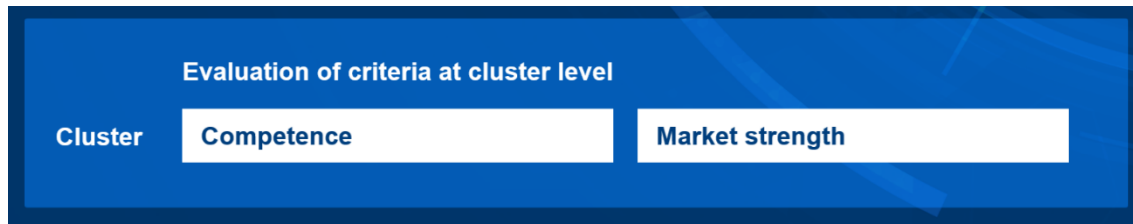


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ABOUT PAC

We are a content-based company with a consulting DNA. PAC is the leading European consulting and analyst firm supporting software & IT service vendors worldwide. Since 1976, we have helped our clients to understand market dynamics, grow their revenue and raise their profile. Our unrivalled understanding of European markets, and deep research coverage help key market players to define their strategy, optimize their go-to-market and increase market share. PAC is an analyst-led consultancy with a team of over 100 experts across Europe. We provide market research and analysis on more than 30 countries worldwide, delivered through our portfolio pillars, Guidance, Insights, and Visibility, and our renowned SITSI® research platform.

More on www.pacanalyst.com.

RADAR

Salesforce-Related Services in Europe: The Financial Services View

SITSI® | Vendor Analysis | PAC RADAR

 **REPLY**



TABLE OF CONTENTS

Introduction	4
SALESFORCE IN EUROPEAN FINANCIAL SERVICES.....	5
PAC INNOVATION RADAR "SALESFORCE-RELATED SERVICES in Europe 2024".....	6
Vendor Analysis: Reply Group	7
Objective of the PAC RADAR.....	9
PAC RADAR Evaluation Method.....	10
Provider selection & participation	10
Considered providers by segment.....	11
The concept.....	12
PAC RADAR Report License.....	13
About the PAC RADAR.....	14
About PAC.....	14

TABLE OF FIGURES

Fig. 1: PAC INNOVATION RADAR "Salesforce-related Services in Europe".....	6
Fig. 1: PAC RADAR graph (exemplary presentation).....	9
Fig. 2: PAC INNOVATION RADAR graph (exemplary presentation).....	9
Fig. 3: PAC RADAR – evaluation method	12

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INTRODUCTION

Salesforce's European business has been out-growing its North American division in recent quarters. Revenue from Europe reached \$7.2bn in the vendor's most recently reported fiscal year, driven by the expansion of its core portfolio and customers adopting its propositions to support increasingly critical areas of their business.

Salesforce is planning to invest to drive further momentum in the region. The vendor unveiled plans to invest \$4bn in its UK business alone over the next five years. This will be channelled into "innovation, customer success and growth," and helping customers harness the company's increasingly AI-centric approach. Similar funding initiatives are expected in other key European markets, including France and Germany. Some of this investment will also help to reinforce Salesforce's partner ecosystem, which continues to play a hugely important role in driving Salesforce's client success in the region. PAC research

This has created a major opportunity for its partner ecosystem, which incorporates more than 500 advisory, implementation and development partners in the region. PAC expects European businesses to increase their spending on Salesforce-related consulting and systems integration from €8bn in 2023 to €13bn in 2027.

Salesforce relies on services partners to accelerate its customers' time to value and to help them harness the vendor's growing importance at the heart of their business.

But a key part of the role of Salesforce partners is to help join the dots between the platform and the specific needs of the client and the industry in which they operate. As business become more digital-centric, they need assistance in building platforms and services that support and enhance the critical moving parts of their organization.

PAC estimates that more than 50% of major Salesforce projects now require the services

provider to have industry domain-specific knowledge or experience or in working their vertical market. This is because customers are increasingly using Salesforce's expanding platform to support critical aspects of their digital-centric operations.

Salesforce has responded to this through the introduction and expansion of the Salesforce Industries and industry cloud propositions, as well as the launch of an advisory board for its EMEA operation that included executives with experience of leading market-leading organizations including Aegon, Beiersdorf, BMW, Publicis SNCF and Siemens.

This study aims to provide enterprise buyers across Europe with the insights they need to shortlist the right partners for their Salesforce investments, with analysis focusing on the overall capabilities of major providers in the region. In addition, the study will present analysis of the differentiators and specific capability of leading firms in the market, in line with shifting enterprise priorities and the evolution of new buyer groups. In particular, the research will examine a provider's ability to deliver services that cater to the unique demands of specific industry sectors

SALESFORCE IN EUROPEAN FINANCIAL SERVICES

The financial services sector represents one of the largest Salesforce customer groups in Europe.

The digital revolution that has transformed the sector over the last decade has seen many organizations leverage the Salesforce platform as way to transform their customer-facing activities, and manage their service portfolios across multiple channels.

Santander is one of Salesforce's best-known references in this sector, and it worked with the vendor to transform its view of customer interactions, implementing a single dashboard to see every request, complaint, and opportunity, which helped to free up to 15 hours of time for each client relationship team each week.

Salesforce is becoming entrenched in its clients' core business processes. In the insurance space, it is now being used by carriers in the region to process claims and manage customer policies. Banks are using it as the platform on which they launch and operate new digital banking services.

Financial services organizations are increasingly looking to re-platform their complex back- and middle-office application workloads in order to keep pace with their customers' changing needs and preferences.

As Salesforce fills out its integration and AI capabilities through acquisitions and new product development, it is becoming an increasingly attractive option for financial services businesses looking to transform at speed.

In this report, we map out those IT services organizations that combine the deep industry domain knowledge and expertise with experience in supporting Salesforce's expanding portfolio in the European financial services sector.

Selected Key Salesforce Accounts in the European Financial Sector

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PAC INNOVATION RADAR "SALESFORCE-RELATED SERVICES IN EUROPE 2024"

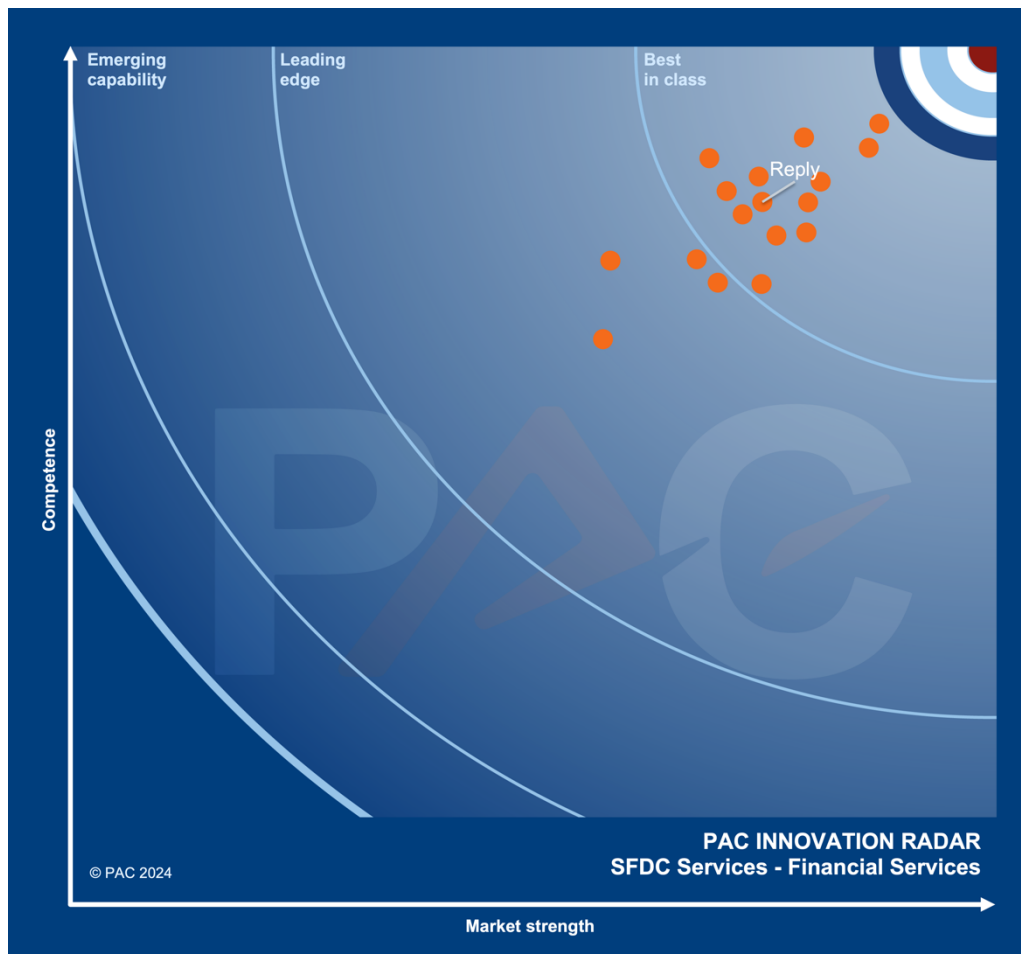


Fig. 1: PAC INNOVATION RADAR "Salesforce-related Services in Europe"

Based on the scores in competence and market strength, the overall score is calculated (calculation: competence score plus market strength score, divided by two). From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

The classification of providers is based on the overall score:

"Best in Class"	1.0 – 1.9
"Leading Edge"	2.0 – 2.9
"Emerging capability"	3.0 – 3.9

PAC INNOVATION RADAR – Salesforce Services in Europe 2024

The Financial Services View

Key Strengths (Industry Specific)

- **Domain Expertise:** Reply has deep domain expertise in the financial services sector, with an advisory and digital services portfolio that supports the transformation agenda of banks and insurance companies across a broad range of topics including compliance, service modernization and digital transformation. Core propositions for the financial services sector include consulting, project management, multi-cloud implementation and digital transformation supporting Sales, Service, Marketing and Commerce Clouds, as well as Financial Service Cloud, MuleSoft and Tableau.
- **Delivering at Scale.** The vendor is currently working on major, multi-cloud Salesforce projects at one of Europe's leading motor finance specialists, and one of the region's largest insurance carriers.
- **Industry Project Focus.** Reply is currently supporting the UK division of a major global insurance group in the development and implementation of a Mulesoft strategy, and it is looking to build on this momentum and the large network of customers and contacts among UK financial services customers, to make a push around its Salesforce-related expertise in the country. On another engagement, Reply has worked with a client to enable the management of credit products and credit models on online platforms to reach customers through simplified, digitalised processes and create partnerships between financial institutions and merchants. Reply has already certified "Financial Service Cloud" experts and implemented the first "Financial Service Cloud" solution (in EU) for an Italian bank customer.
- **Innovation & AI.** Reply already has a strong focus on AI and has gained initial certifications in the Salesforce AI space as well. The company has applied to be a Pilot/ Enablement Partner for AI/ GPT and Data Cloud - campaign. Potential use cases could include customer service / field service with applications such as Service Cloud, and Contact Center with Service console with voice transcription and recommendations based on AI Einstein features / Service Cloud Voice / Service GPT / digital agents. In the financial services industry, the use of AI for the appropriate customer approach in marketing campaigns is also an important tool to enhance sales actions.
- **Salesforce Recognition.** Reply works closely with Salesforce in this sector, participating in the strategic Financial Services Round Table and similar boards in Italy. Based on the company's past projects in this sector, Reply has earned the Salesforce specialisation for the "Financial Services" industry and also for "Insurance" and "Banking".
- **Brand Awareness.** Reply has a growing brand in this market as a cloud services partner through the research it has published around cloud adoption and barriers among European financial services organizations.

Key Strengths (General)

- **A growing force.** Reply is one of the fastest growing IT services providers in the world, more than doubling its global revenue over the last five years to €1.9bn, with its headcount growing at a similar level to reach more than 14,300 employees worldwide. The company works with its clients to optimize and integrate processes and applications, and supports them in defining and developing strategies and new business models. Reply combines specific sector expertise across eight core markets with wide experience in the provision of consulting, applications and technology infrastructure services.
- **Balanced structure.** Reply's structure is based on harnessing a network of specialist companies, which allow it to strike a balance between the agility of a small service partner with the resourcing and economies of scale benefits of an international corporation.
- **Salesforce focus.** The company's Salesforce capabilities are centered around the Arlanis Reply division, which is dedicated to Salesforce consulting and services. As one of the first Salesforce pioneers in Europe, Arlanis can look back on a Salesforce partnership dating back to 2005, demonstrating its extensive experience in the Salesforce ecosystem. Other Reply companies manage Salesforce projects with their specific industry focus (e.g. Retail Reply, Power Reply, Fincon Reply for financial industry) or expertise (e.g. Glue Reply for architecture and integration with Mulesoft, Like Reply for marketing automation, Blue and Target Reply for BI analysis using Tableau). All of them work together very closely and in a coordinated way. For global coordination and central Salesforce Partner Program organisation there is a dedicated Global Salesforce Alliance Manager.
- **Salesforce Experience.** Reply has been a Salesforce partner since 2005, when it became one of the first Salesforce partners in Germany and Italy and continuously maintains Summit Partner status. Since 2023, Reply has been selected by Salesforce as one of the "EMEA Strategic Partners", engaging across individual regions throughout Europe and driving strategic and innovative topics with Salesforce. The company has more than 500 Salesforce experts supporting clients in the region (with more than 850 Salesforce certifications), and has experience of delivering more than 500 Salesforce projects. The company has an average project rating of 4.9 out of 5.0 from clients, and has built up a network of six competence centers across the region.
- **Expansion Mode.** Reply continues to bolster its Salesforce capabilities through both recruitment and through its M&A strategy. In October 2022, the company acquired France-based Wemanity, an agile and digital transformation specialist, which also brings a team of integration specialists and Mulesoft experts, expanding Reply's Salesforce & Mulesoft expertise in France.

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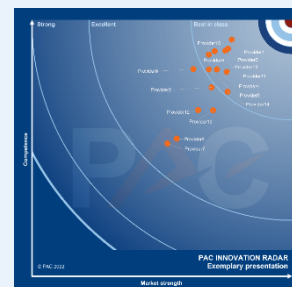


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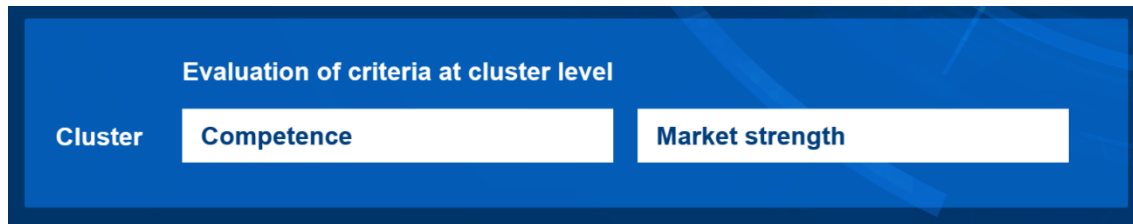


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We are a content-based company with a consulting DNA. PAC is the leading European consulting and analyst firm supporting software & IT service vendors worldwide. Since 1976, we have helped our clients to understand market dynamics, grow their revenue and raise their profile. Our unrivalled understanding of European markets, and deep research coverage help key market players to define their strategy, optimize their go-to-market and increase market share. PAC is an analyst-led consultancy with a team of over 100 experts across Europe. We provide market research and analysis on more than 30 countries worldwide, delivered through our portfolio pillars, Guidance, Insights, and Visibility, and our renowned SITSI® research platform.

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RA**AR**

Salesforce-Related Services in Europe: The Communications & Media View

SITSI® | Vendor Analysis | PAC RADAR



TABLE OF CONTENTS

Introduction	4
SALESFORCE IN EUROPEAN COMMS & MEDIA.....	5
PAC INNOVATION RADAR "SALESFORCE-RELATED SERVICES in Europe 2024".....	6
Vendor Analysis: Reply Group	7
Objective of the PAC RADAR.....	10
PAC RADAR Evaluation Method.....	11
Provider selection & participation	11
Considered providers by segment.....	12
The concept.....	13
PAC RADAR Report License.....	14
About the PAC RADAR.....	15
About PAC.....	15

TABLE OF FIGURES

Fig. 1: PAC INNOVATION RADAR "Salesforce-related Services in Europe".....	6
Fig. 1: PAC RADAR graph (exemplary presentation).....	10
Fig. 2: PAC INNOVATION RADAR graph (exemplary presentation).....	10
Fig. 3: PAC RADAR – evaluation method	13

DOCUMENT INFORMATION

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INTRODUCTION

Salesforce's European business has been out-growing its North American division in recent quarters. Revenue from Europe reached \$7.2bn in the vendor's most recently reported fiscal year, driven by the expansion of its core portfolio and customers adopting its propositions to support increasingly critical areas of their business.

Salesforce is planning to invest to drive further momentum in the region. The vendor unveiled plans to invest \$4bn in its UK business alone over the next five years. This will be channelled into "innovation, customer success and growth," and helping customers harness the company's increasingly AI-centric approach. Similar funding initiatives are expected in other key European markets, including France and Germany. Some of this investment will also help to reinforce Salesforce's partner ecosystem, which continues to play a hugely important role in driving Salesforce's client success in the region. PAC research

This has created a major opportunity for its partner ecosystem, which incorporates more than 500 advisory, implementation and development partners in the region. PAC expects European businesses to increase their spending on Salesforce-related consulting and systems integration from €8bn in 2023 to €13bn in 2027.

Salesforce relies on services partners to accelerate its customers' time to value and to help them harness the vendor's growing importance at the heart of their business.

But a key part of the role of Salesforce partners is to help join the dots between the platform and the specific needs of the client and the industry in which they operate. As business become more digital-centric, they need assistance in building platforms and services that support and enhance the critical moving parts of their organization.

PAC estimates that more than 50% of major Salesforce projects now require the services provider to have industry domain-specific knowledge or experience or in working their vertical market. This is because customers are increasingly using Salesforce's expanding

platform to support critical aspects of their digital-centric operations.

Salesforce has responded to this through the introduction and expansion of the Salesforce Industries and industry cloud propositions, as well as the launch of an advisory board for its EMEA operation that included executives with experience of leading market-leading organizations including Aegon, Beiersdorf, BMW, Publicis SNCF and Siemens.

This study aims to provide enterprise buyers across Europe with the insights they need to shortlist the right partners for their Salesforce investments, with analysis focusing on the overall capabilities of major providers in the region. In addition, the study will present analysis of the differentiators and specific capability of leading firms in the market, in line with shifting enterprise priorities and the evolution of new buyer groups. In particular, the research will examine a provider's ability to deliver services that cater to the unique demands of specific industry sectors

SALESFORCE IN EURO- PEN COMMS & MEDIA

The pace of change is accelerating in Europe's telecoms and media sector.

Over two thirds of the region's operators have now deployed 5G, with more than half having rolled out 5G networks. This is encouraging many communications service providers (CSPs) to change their positioning from connectivity providers to providers of connected experiences enabled by 5G.

At the same time, incumbents such as BT and Telecom Italia have undertaken far-reaching transformation programmes to simplify and automate operations in order to give them the agile core they need to speed time-to-market and improve the customer experience.

In the streaming age, the lines between telecoms and media organizations have never been more blurred, as competition in the lucrative digital content market intensifies. Many of the region's media organizations have experienced a challenging time due to fluctuating advertising spend, and with further volatility on the horizon, many are striving for greater flexibility.

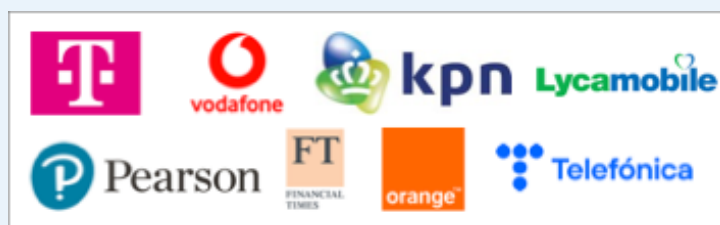
Communications and media has become one of Salesforce's strongest industry sectors in Europe, as businesses from all areas of the market adopted its customer-facing propositions to build a level of insight that their legacy CRM systems could not deliver.

But Salesforce is also getting deeper into its clients' core industry processes. In the telecoms space for example, many companies are rethinking their wider Business Support Systems (BSS) strategy which covers not just CRM but order capture and billing as well.

The ongoing wave of operator consolidation is often a major trigger for a change in direction, and Salesforce, and its wider partner ecosystem, are positioning to support these modernization initiatives.

In this report, we map out those IT services organizations that combine the deep industry domain knowledge and expertise with experience in supporting Salesforce's expanding portfolio in the European communications and media sector.

Selected Key Salesforce Accounts in the European Communications & Media Sector



PAC INNOVATION RADAR "SALESFORCE-RELATED SERVICES IN EUROPE 2024"

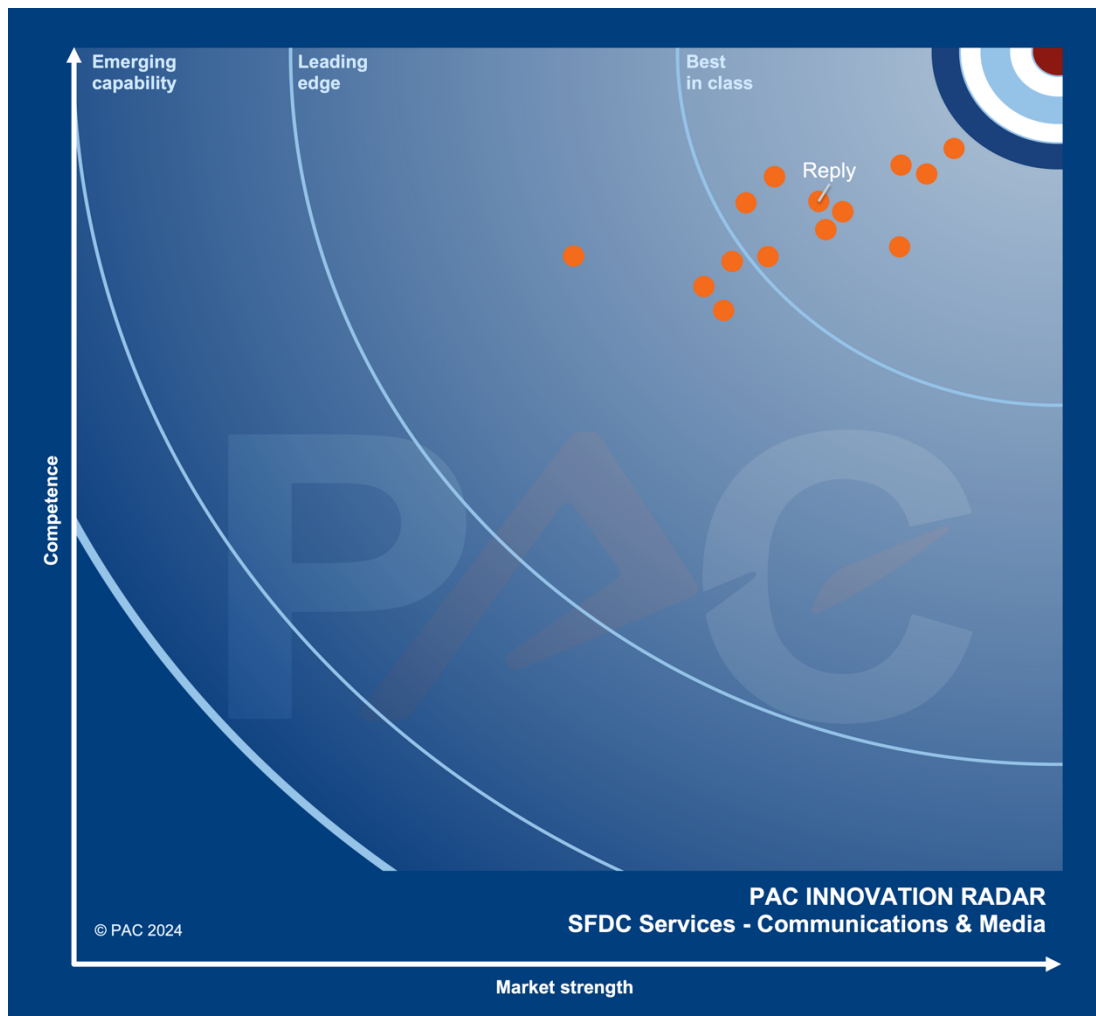


Fig. 1: PAC INNOVATION RADAR "Salesforce-related Services in Europe"

Based on the scores in competence and market strength, the overall score is calculated (calculation: competence score plus market strength score, divided by two). From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

The classification of providers is based on the overall score:

"Best in Class"	1.0 – 1.9
"Leading Edge"	2.0 – 2.9
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PAC INNOVATION RADAR – Salesforce Services in Europe 2024

The Communications & Media View

Key Strengths (Industry Specific)

- Domain expertise.** Reply has extensive expertise in this sector from the Reply network as well as many years of project experience with customers in this industry, as well as deep technical expertise and certifications for Salesforce portfolio (incl. Mulesoft and Tableau). In addition to Arlanis Reply as a Salesforce expert, Reply companies such as Sytel Reply bring expertise in Business Support Systems (BSS) and Operating Support System (OSS) platforms or Target Reply with BI analysis via Tableau.
- Delivering Salesforce at scale.** From a Salesforce perspective, the vendor has delivered the largest Salesforce implementation in the communications sector at the time for a major telecom and broadband provider in Southern Europe, as well as one of the largest Tableau projects for another telco customer. Architectural consulting and integration via MuleSoft are also among the important issues for Reply's telecom customers. The company also supports a number of media customers in the publishing sector in Italy.
- Partner recognition.** Reply's success in delivering projects in this area has contributed to Reply receiving "Specialist" level accreditation from Salesforce for the "Communications" and "Media & Entertainment" sectors. The company now also ranks as one of the five largest Salesforce communications and media partners in both Germany and France.
- Breadth of portfolio.** Reply's core Salesforce proposition for the Communications & Media sector spans: consulting, project management and (multi-cloud) implementation & digital transformation; Industry Cloud implementation (including both Communication Cloud and Media Cloud); architecture consulting and integration; and managed application services.
- Group-wide capabilities.** The company is also able to leverage a broad base of expertise across its group operations including business planning and case development, defining processes and business requirements, market analysis of suitable products, solution design, configuration and build, quality testing, deployment and integration and end-user training.
- Supporting client journeys.** One major client engagement came with a leading company in the media and communication sector in the implementation of a system capable of calling on various applications in order to manage the deletion of customer records. The project was the pilot of a complete renewal of the technologies in the company's infrastructure, which involved the replacement of legacy technologies with MuleSoft. The solution involved the creation of a Cancellation Register, a database of information relating to the cancellation of customer records, combined with an orchestration process based on MuleSoft. An integration platform that allowed the development of an automated process based on the API-Led approach.

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- **Domain-centric propositions.** Four core focus areas for Reply's Salesforce practice in this sector include omni-channel customer experience, catalogue-driven architecture, real-time/convergent billing solutions and driving improved consistency in customer data.
- **AI focus.** Looking ahead, Reply is at the forefront of exploring the market potential of generative AI for businesses, providing strong expertise and concrete know-how. Thanks to its existing AI and Chat GPT expertise, Reply was well-prepared for the recently announced Salesforce GPT product enhancements and was able to present the new Salesforce AI Associate certificates and implement the first Salesforce GPT applications in a very short time. With these capabilities, Reply is well-equipped to leverage Salesforce's AI portfolio and create new business opportunities through the utilization of generative Salesforce AI offerings for the communications and media sector as well.
- **A growing force.** Reply is one of the fastest growing IT services providers in the world, more than doubling its global revenue over the last five years to €1.9bn, with its headcount growing at a similar level to reach more than 14,300 employees worldwide. The company works with its clients to optimize and integrate processes and applications, and supports them in defining and developing strategies and new business models. Reply combines specific sector expertise across eight core markets with wide experience in the provision of consulting, applications and technology infrastructure services.
- **Balanced structure.** Reply's structure is based on harnessing a network of specialist companies, which allow it to strike a balance between the agility of a small service partner with the resourcing and economies of scale benefits of an international corporation.
- **Salesforce focus.** The company's Salesforce capabilities are centered around the Arlanis Reply division, which is dedicated to Salesforce consulting and services. As one of the first Salesforce pioneers in Europe, Arlanis can look back on a Salesforce partnership dating back to 2005, demonstrating its extensive experience in the Salesforce ecosystem. Other Reply companies manage Salesforce projects with their specific industry focus (e.g. Retail Reply, Power Reply, Fincon Reply for financial industry) or expertise (e.g. Glue Reply for architecture and integration with Mulesoft, Like Reply for marketing automation, Blue and Target Reply for BI analysis using Tableau). All of them work together very closely and in a coordinated way. For global coordination and central Salesforce Partner Program organisation there is a dedicated Global Salesforce Alliance Manager

Key Strengths (General)

- **Salesforce experience.** Reply has been a Salesforce partner since 2005, when it became one of the first Salesforce partners in Germany and Italy and continuously maintains Summit Partner status. Since 2023, Reply has been selected by Salesforce as one of the "EMEA Strategic Partners", engaging across individual regions throughout Europe and driving strategic and innovative topics with Salesforce. The company has more than 500 Salesforce experts supporting clients in the region (with more than 850 Salesforce certifications), and has experience of delivering more than 500 Salesforce projects. The company has an average project rating of 4.9 out of 5.0 from clients, and has built up a network of six competence centers across the region.
- **Expansion mode.** Reply continues to bolster its Salesforce capabilities through both recruitment and through its M&A strategy. In October 2022, the company acquired France-based Wemanity, an agile and digital transformation specialist, that also served as a MuleSoft consulting and implementation partner.

OBJECTIVE OF THE PAC RADAR

What is the PAC RADAR?

The PAC RADAR is an effective tool for the holistic evaluation and visual positioning of software and ICT service providers on local markets. Numerous ICT and business decision-makers in user companies of all industries and company sizes rely on the PAC RADAR when selecting their partners and developing their sourcing strategies. With the help of predefined criteria, PAC evaluates and compares providers' strategies, development, and market position, in addition to their performance and competencies within specific market segments.

Each PAC RADAR focuses on a specific IT market segment. Up to 30 leading providers are evaluated per segment. Participation in the PAC RADAR is free of charge. All providers are evaluated using PAC's proven methodology, which is based on personal face-to-face interviews and a detailed self-disclosure from each provider.

PAC reserves to also evaluate and position relevant providers in the PAC RADAR that do not participate in the self-disclosure process. After the evaluation of the predefined criteria, each supplier's position is plotted in the PAC RADAR. The criteria are classified by clusters and can all be attributed to the "Competence" and "Market Strength" clusters. The provider evaluation, including a market description, is published as a report.

PAC RADAR graph

The PAC RADAR graph is a visual presentation of the results of the provider evaluation with regard to their market strength (horizontal axis) and competence (vertical axis) in the respective analyzed market segment.

The closer a company is to the center, the closer they are to meeting customers' requirements.



Fig. 1: PAC RADAR graph (exemplary presentation)

What is the PAC INNOVATION RADAR?

Concept and methodology of the PAC INNOVATION RADAR are similar to those of the traditional PAC RADAR.

While the traditional PAC RADAR focuses on mature market segments, the PAC INNOVATION RADAR, on the other hand, positions providers in new and innovative market segments, or in specific niche markets.

Thus, the focus of the evaluation is on the portfolio, vision, strategy, and early client engagements rather than on existing revenue numbers and resources

PAC INNOVATION RADAR graph

The PAC INNOVATION RADAR graph is a visual presentation of the results of the provider evaluation.

The closer a company is to the top right corner, the closer they are to meeting customers' requirements.

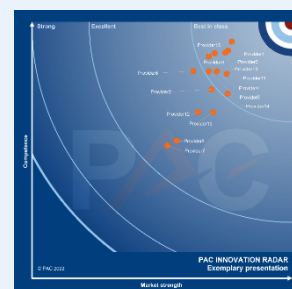


Fig. 2: PAC INNOVATION RADAR graph (exemplary presentation)

PAC RADAR EVALUATION METHOD

Provider selection & participation

Which providers are positioned in the PAC RADAR?

Providers are selected and invited according to the following criteria:

- **Size of revenues** in the segment to be analyzed in the specified region.
- **"Relevance"**: Even providers that do not belong to the top-selling providers in the segment to be analyzed are considered if PAC classifies them as relevant for potential customers, for instance due to an innovative offering, strong growth, or a focus on a specific customer group (e.g., SMBs).

There is no differentiation as to whether the providers are customers of PAC – neither in the selection of the providers to be positioned, nor in the actual evaluation.

What do providers have to do in order to be considered in a PAC RADAR analysis?

The decision as to which providers are considered in the PAC RADAR analysis is entirely up to PAC. Providers do not have any direct influence on this decision.

However, in the run-up to a PAC RADAR analysis, providers can make sure in an indirect way that

PAC can adequately evaluate their offerings and positioning – and thus their relevance – e.g., by means of regular analyst briefings, etc.

Why should providers accept the invitation to actively participate?

Whether or not a provider participates in the RADAR process does not actually affect their inclusion and positioning in the PAC RADAR, nor their assessment. However, there are a whole host of benefits associated with active participation:

- Participation ensures that PAC has access to the largest possible range of specific and up-to-date data as a basis for the assessment.
- Participating providers can set out their specific competencies, strengths, and weaknesses as well as their strategies and visions.
- The review process guarantees the accuracy of the assessed factors.
- Submitting customer assessments can have a positive impact on the overall score.
- The provider gets a neutral, comprehensive, and detailed view of their strengths and weaknesses as compared to the direct competition – related to a specific service in a local market.
- A positioning in the PAC RADAR gives the provider prominence amongst a broad readership as one of the leading players in the segment under consideration.

Considered providers by segment

Communications & Media	Energy & Utilities	Financial Services	Manufacturing	Public Sector	Retail
<ul style="list-style-type: none"> • Accenture • Bearing Point • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • NTT Data • Reply • TCS • Telekom MMS • Wipro 	<ul style="list-style-type: none"> • Accenture • Bearing Point • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Wipro 	<ul style="list-style-type: none"> • Accenture • BearingPoint • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Wipro 	<ul style="list-style-type: none"> • Accenture • BearingPoint • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Tietoenvy • Wipro 	<ul style="list-style-type: none"> • Accenture • BearingPoint • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • Nextview • NTT Data • PwC • Reply 	<ul style="list-style-type: none"> • Accenture • Capgemini • CGI • Deloitte • IBM • Merkle • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Tietoenvy • Wipro

The concept

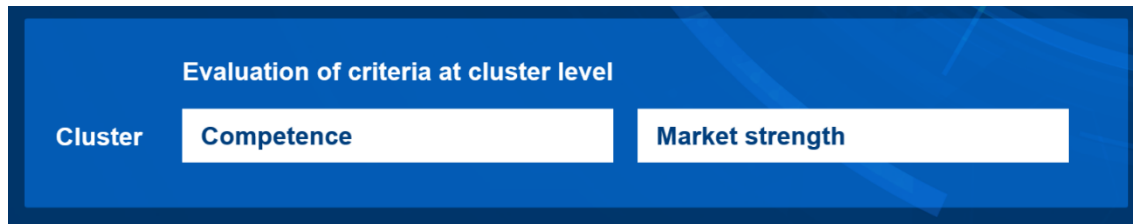


Fig. 3: PAC RADAR – evaluation method

PAC uses **predefined criteria** to assess and compare the providers within given service segments. The assessment is based on the report-card score within the peer group of the positioned providers.

This is based on:

- The provider's detailed self-disclosure about resources, distribution, delivery, portfolio, contract design, pricing, customer structure, customer references, investments, partnerships, certifications, etc.;
- An assessment of the provider by reference customers (to be obtained by the provider);
- If applicable, a poll among customers by PAC;
- The analysis of existing PAC databases;
- Secondary research;
- Dedicated face-to-face interviews as relevant.

The provider data is verified by PAC and any omissions are rectified based on estimates.

If the provider does not participate, the assessment is performed using the proven PAC methodology, mainly based on:

- Information obtained from face-to-face interviews with the provider's representatives, analyst briefings, etc.;
- An assessment of company presentations, company reports, etc.;
- An assessment of PAC databases;
- An assessment of earlier PAC RADARs in which the provider participated;
- A poll among the provider's customers (as required) on their experiences and satisfaction

What if no customer assessments, or fewer than required, are submitted?

The overall assessment has to include the number of customer assessments requested in the invitation. Any missing customer assessments are scored as "satisfied," i.e., they do not negatively affect the score. This produces an average score for criteria based on customer assessments

Reissue of published RADARs

The scores in the PAC RADAR represent an assessment of the providers within the given peer group in the year in which the respective PAC RADAR was published.

The evaluations may not be directly comparable with those of any previous version due to subsequent content modifications. In particular, they do not depict a development of individual providers over time.

Methodological and/or organizational modifications may be made due to changing market conditions and trends, and may include:

- A different peer group in the focus of the analysis;
- Modification of individual criteria within clusters and sub-clusters;
- Increased or altered expectations by user companies;
- Adjustment of the weighting of individual criteria.

PAC RADAR REPORT LICENSE

PAC RADAR "Salesforce-related Services in Europe 2024"

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Moreover, copyright conditions for the PAC RADAR apply (see [Error! Reference source not found.](#)).

ABOUT THE PAC RADAR

The PAC RADAR is protected by Pierre Audoin Consultants (PAC) Ltd. copyright.

The PAC RADAR is a graphical representation and written analysis of the positioning of various IT providers within a defined market segment at a specific point in time. The positioning and characterization of selected companies within the PAC RADAR is conducted on the basis of an analytical assessment of criteria which PAC previously defined for this analysis.

The selection, positioning, and characterization of companies within the PAC RADAR is not subject to any vested interests whatsoever. PAC does not support any providers that are represented in the PAC RADAR, and does not give any recommendations to technology users. The PAC RADAR represents a result from market research only and must not be taken as a recommendation for action.

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PAC excludes all express or implied claims, also if derived from warranties with respect to the PAC RADAR report, including any implied warranties of merchantability or fitness for a particular purpose.

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RA**AR**

Salesforce-Related Services in Europe: The Retail View

SITSI® | Vendor Analysis | PAC RADAR



 **REPLY**

PAC
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IT SUPPLIER ASSESSMENT FROM PAC
SALESFORCE SERVICES IN EUROPE
Retail
BEST IN CLASS
REPLY
2024

TABLE OF CONTENTS

Introduction	4
SALESFORCE IN EUROPEAN RETAIL SECTOR.....	5
PAC INNOVATION RADAR "SALESFORCE-RELATED SERVICES in Europe 2024".....	6
Vendor Analysis: Reply Group	7
Objective of the PAC RADAR.....	9
PAC RADAR Evaluation Method.....	10
Provider selection & participation	10
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The concept	12
PAC RADAR Report License.....	13
About the PAC RADAR.....	14
About PAC.....	14

TABLE OF FIGURES

Fig. 1: PAC INNOVATION RADAR "Salesforce-related Services in Europe".....	6
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SALESFORCE IN EUROPEAN RETAIL SECTOR

Europe's retailers are operating at a time of unprecedented disruption.

Customers have dramatically transitioned to digital channels across the entire region, with the shift accelerated by the impact of the pandemic. Four out of ten shoppers in Germany continue to buy more goods online than they did three years ago.

Expectations on service levels have also been raised, with two thirds of European e-commerce consumers expecting deliveries to arrive no later than between three to five days. Almost a fifth of French consumers say they will not buy from a retail brand again if they have a negative returns experience.

The race for customer loyalty has never been tougher. Research from *Antavo* found that 56% of European retailers offer a personalized loyalty programme (compared to just 37% in the US), while more than 40% of loyalty programme owners engage with customers outside of the buying cycle.

Many European consumers are also turning to retail brands that match their values in terms of sustainability, diversity and inclusion. Being able to demonstrate clear, measurable progress in these areas has become a boardroom priority.

At the same time, the volatile economic backdrop means that retail groups need the agility to respond to changing supply and demand levels

Salesforce has long played an important role in the European retail space as a customer relationship management platform. But it is now being used as a much more significant engine for the whole enterprise, underpinning aspects such as trade, marketing and sustainability.

In this report, we map out those IT services organizations that combine the deep industry domain knowledge and expertise with experience in supporting Salesforce's expanding portfolio in the retail sector.

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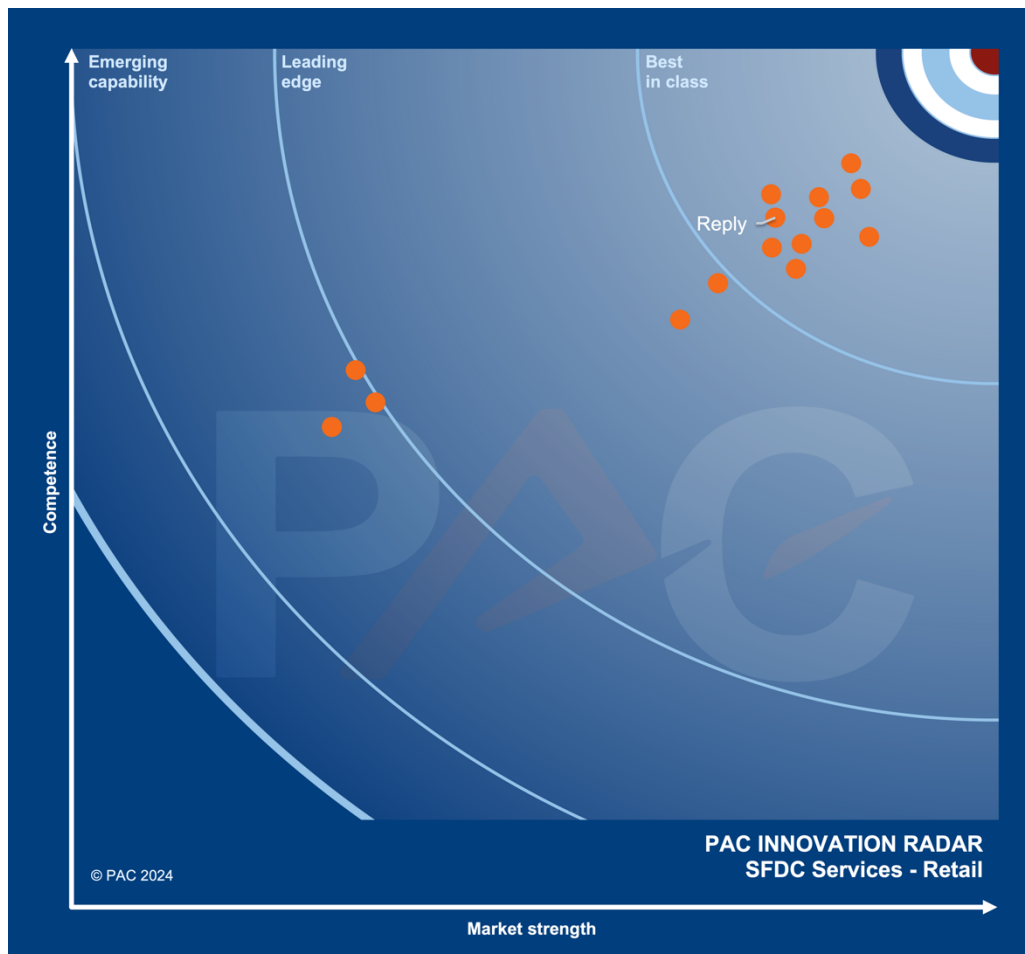


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Key Strengths (Industry Specific)

- **Domain focus.** Retail is an important focus market for Reply, with the dedicated Retail Reply company focusing on supporting digital transformation and CX transformation for luxury and fashion groups, hospitality, fast moving consumer goods, automotive retailer and other retail sectors.
- **Multi-cloud experience.** For more complex technical engagements, the Arlanis Reply division is also able to support Salesforce initiatives that require integration across multiple cloud environments. Reply also offers architecture consulting and integration with other enterprise systems and solutions via MuleSoft API integration.
- **AI experience.** Reply has developed some interesting use cases and accelerators to help retail customers also leverage the potential of Einstein AI capabilities in Salesforce, for example. This is an area where Reply can continue to drive differentiation as customers look for greater efficiency and performance improvements.
- **Supporting customer journeys.** With the Salesforce acquisition of Tableau, competence and valuable customer references can also be named for this Salesforce area, especially in the retail industry. The Retail Reply UK solution with Tableau for John Lewis Partnerships was one of the most important of 2022/23 and was highlighted in the keynote at the Tableau conference in Las Vegas in May 2023.
- **Assets & differentiators.** Reply has also developed a series of assets and accelerators which help it differentiate in this sector. For fashion retail group Capri, it helped to improve the shopping experience by integrating its Order Management System, a microservices platform natively integrated with more than 100 couriers, with Salesforce Commerce Cloud and the customer's main payment gateways. The company has strong project experience around the Salesforce Commerce Cloud, and many of its experts have a deep industry background in eCommerce (both B2C and B2B).
- **Partner accreditation.** Reply also has a Specialist accreditation in the retail sector from Salesforce, and the two companies work closely on joint customer acquisition.
- **Breadth of offering.** Reply's core Salesforce proposition spans: consulting, project management and (multi-cloud) implementation & digital transformation (relating to Sales, Service, Marketing, Commerce Cloud B2B and B2C, Customer 360, Data Cloud, and Tableau); architecture consulting and integration; and managed application services. The company is also able to leverage a broad base of expertise across its group operations including business planning and case development, defining processes and business requirements, market analysis of suitable products, solution design, configuration and build, quality testing, deployment and integration and end-user training.

Key Strengths (Industry Specific)

- **Innovation focus.** Retail Reply is setting up a demo point at the Reply headquarters in Turin, which will show a "Salesforce Commerce Suite" (Salesforce Commerce + Order Management + Omni-channel Inventory) and demonstrate its frameworks and procedures to customers and prospects. With the existing AI and GPT expertise, Reply is well prepared to leverage Salesforce's AI portfolio and create new business opportunities by utilising Salesforce's generative AI offerings also for the retail industry.

Key Strengths (General)

- **A growing force.** Reply is one of the fastest growing IT services providers in the world, more than doubling its global revenue over the last five years to €1.9bn, with its headcount growing at a similar level to reach more than 14,300 employees worldwide. The company works with its clients to optimize and integrate processes and applications, and supports them in defining and developing strategies and new business models. Reply combines specific sector expertise across eight core markets with wide experience in the provision of consulting, applications and technology infrastructure services.
- **Balanced structure.** Reply's structure is based on harnessing a network of specialist companies, which allow it to strike a balance between the agility of a small service partner with the resourcing and economies of scale benefits of an international corporation.
- **Salesforce focus.** The company's Salesforce capabilities are centered around the Arlanis Reply division, which is dedicated to Salesforce consulting and services. As one of the first Salesforce pioneers in Europe, Arlanis can look back on a Salesforce partnership dating back to 2005, demonstrating its extensive experience in the Salesforce ecosystem. Other Reply companies manage Salesforce projects with their specific industry focus (e.g. Retail Reply, Power Reply, ...) or expertise (e.g. Glue Reply for architecture and integration with Mulesoft, Like Reply for marketing automation, Blue and Target Reply for BI analysis using Tableau).
- All of them work together very closely and in a coordinated way. For global coordination and central Salesforce Partner Program organisation there is a dedicated Global Salesforce Alliance Manager.
- **Salesforce experience.** Reply has been a Salesforce partner since 2005, when it became one of the first Salesforce partners in Germany and Italy, and continuously maintains Summit Partner status. Since 2023, Reply has been selected by Salesforce as one of the "EMEA Strategic Partners", engaging across individual regions throughout Europe and driving strategic and innovative topics with Salesforce. The company has more than 500 Salesforce experts supporting clients in the region (with more than 850 Salesforce experts supporting clients in the region (with more than 780 Salesforce certifications), and has experience of delivering more than 500 Salesforce projects. The company has an average project rating of 4.9 out of 5.0 from clients, and has built up a network of six competence centers across the region.
- **Expansion mode.** Reply continues to bolster its Salesforce capabilities through both recruitment and through its M&A strategy. In October 2022, the company acquired France-based Wemanity, an agile and digital transformation specialist, which also brings a team of integration specialists and Mulesoft experts, expanding Reply's Salesforce & Mulesoft expertise in France.

OBJECTIVE OF THE PAC RADAR

What is the PAC RADAR?

The PAC RADAR is an effective tool for the holistic evaluation and visual positioning of software and ICT service providers on local markets. Numerous ICT and business decision-makers in user companies of all industries and company sizes rely on the PAC RADAR when selecting their partners and developing their sourcing strategies. With the help of predefined criteria, PAC evaluates and compares providers' strategies, development, and market position, in addition to their performance and competencies within specific market segments.

Each PAC RADAR focuses on a specific IT market segment. Up to 30 leading providers are evaluated per segment. Participation in the PAC RADAR is free of charge. All providers are evaluated using PAC's proven methodology, which is based on personal face-to-face interviews and a detailed self-disclosure from each provider.

PAC reserves to also evaluate and position relevant providers in the PAC RADAR that do not participate in the self-disclosure process. After the evaluation of the predefined criteria, each supplier's position is plotted in the PAC RADAR. The criteria are classified by clusters and can all be attributed to the "Competence" and "Market Strength" clusters. The provider evaluation, including a market description, is published as a report.

PAC RADAR graph

The PAC RADAR graph is a visual presentation of the results of the provider evaluation with regard to their market strength (horizontal axis) and competence (vertical axis) in the respective analyzed market segment.

The closer a company is to the center, the closer they are to meeting customers' requirements.



Fig. 1: PAC RADAR graph (exemplary presentation)

What is the PAC INNOVATION RADAR?

Concept and methodology of the PAC INNOVATION RADAR are similar to those of the traditional PAC RADAR.

While the traditional PAC RADAR focuses on mature market segments, the PAC INNOVATION RADAR, on the other hand, positions providers in new and innovative market segments, or in specific niche markets.

Thus, the focus of the evaluation is on the portfolio, vision, strategy, and early client engagements rather than on existing revenue numbers and resources

PAC INNOVATION RADAR graph

The PAC INNOVATION RADAR graph is a visual presentation of the results of the provider evaluation.

The closer a company is to the top right corner, the closer they are to meeting customers' requirements.

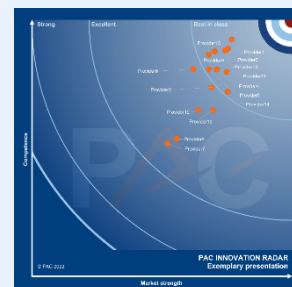


Fig. 2: PAC INNOVATION RADAR graph (exemplary presentation)

PAC RADAR EVALUATION METHOD

Provider selection & participation

Which providers are positioned in the PAC RADAR?

Providers are selected and invited according to the following criteria:

- **Size of revenues** in the segment to be analyzed in the specified region.
- **"Relevance"**: Even providers that do not belong to the top-selling providers in the segment to be analyzed are considered if PAC classifies them as relevant for potential customers, for instance due to an innovative offering, strong growth, or a focus on a specific customer group (e.g., SMBs).

There is no differentiation as to whether the providers are customers of PAC – neither in the selection of the providers to be positioned, nor in the actual evaluation.

What do providers have to do in order to be considered in a PAC RADAR analysis?

The decision as to which providers are considered in the PAC RADAR analysis is entirely up to PAC. Providers do not have any direct influence on this decision.

However, in the run-up to a PAC RADAR analysis, providers can make sure in an indirect way that

PAC can adequately evaluate their offerings and positioning – and thus their relevance – e.g., by means of regular analyst briefings, etc.

Why should providers accept the invitation to actively participate?

Whether or not a provider participates in the RADAR process does not actually affect their inclusion and positioning in the PAC RADAR, nor their assessment. However, there are a whole host of benefits associated with active participation:

- Participation ensures that PAC has access to the largest possible range of specific and up-to-date data as a basis for the assessment.
- Participating providers can set out their specific competencies, strengths, and weaknesses as well as their strategies and visions.
- The review process guarantees the accuracy of the assessed factors.
- Submitting customer assessments can have a positive impact on the overall score.
- The provider gets a neutral, comprehensive, and detailed view of their strengths and weaknesses as compared to the direct competition – related to a specific service in a local market.
- A positioning in the PAC RADAR gives the provider prominence amongst a broad readership as one of the leading players in the segment under consideration.

Considered providers by segment

Communications & Media	Energy & Utilities	Financial Services	Manufacturing	Public Sector	Retail
<ul style="list-style-type: none"> • Accenture • Bearing Point • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • NTT Data • Reply • TCS • Telekom MMS • Wipro 	<ul style="list-style-type: none"> • Accenture • Bearing Point • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Wipro 	<ul style="list-style-type: none"> • Accenture • BearingPoint • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Wipro 	<ul style="list-style-type: none"> • Accenture • BearingPoint • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Tietoevry • Wipro 	<ul style="list-style-type: none"> • Accenture • BearingPoint • Capgemini • CGI • Deloitte • Eviden • IBM • Infosys • Merkle • Nextview • NTT Data • PwC • Reply 	<ul style="list-style-type: none"> • Accenture • Capgemini • CGI • Deloitte • IBM • Merkle • Nextview • NTT Data • Publicis Sapiant • PwC • Reply • TCS • Telekom MMS • Tietoevry • Wipro

The concept

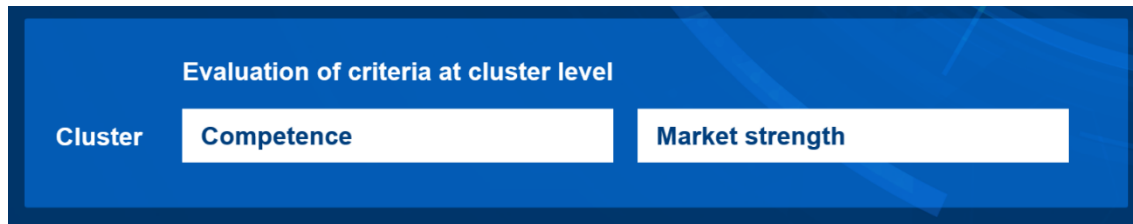


Fig. 3: PAC RADAR – evaluation method

PAC uses **predefined criteria** to assess and compare the providers within given service segments. The assessment is based on the report-card score within the peer group of the positioned providers.

This is based on:

- The provider's detailed self-disclosure about resources, distribution, delivery, portfolio, contract design, pricing, customer structure, customer references, investments, partnerships, certifications, etc.;
- An assessment of the provider by reference customers (to be obtained by the provider);
- If applicable, a poll among customers by PAC;
- The analysis of existing PAC databases;
- Secondary research;
- Dedicated face-to-face interviews as relevant.

The provider data is verified by PAC and any omissions are rectified based on estimates.

If the provider does not participate, the assessment is performed using the proven PAC methodology, mainly based on:

- Information obtained from face-to-face interviews with the provider's representatives, analyst briefings, etc.;
- An assessment of company presentations, company reports, etc.;
- An assessment of PAC databases;
- An assessment of earlier PAC RADARs in which the provider participated;
- A poll among the provider's customers (as required) on their experiences and satisfaction

What if no customer assessments, or fewer than required, are submitted?

The overall assessment has to include the number of customer assessments requested in the invitation. Any missing customer assessments are scored as "satisfied," i.e., they do not negatively affect the score. This produces an average score for criteria based on customer assessments

Reissue of published RADARs

The scores in the PAC RADAR represent an assessment of the providers within the given peer group in the year in which the respective PAC RADAR was published.

The evaluations may not be directly comparable with those of any previous version due to subsequent content modifications. In particular, they do not depict a development of individual providers over time.

Methodological and/or organizational modifications may be made due to changing market conditions and trends, and may include:

- A different peer group in the focus of the analysis;
- Modification of individual criteria within clusters and sub-clusters;
- Increased or altered expectations by user companies;
- Adjustment of the weighting of individual criteria.

PAC RADAR REPORT LICENSE

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The PAC RADAR is a graphical representation and written analysis of the positioning of various IT providers within a defined market segment at a specific point in time. The positioning and characterization of selected companies within the PAC RADAR is conducted on the basis of an analytical assessment of criteria which PAC previously defined for this analysis.

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ABOUT PAC

We are a content-based company with a consulting DNA. PAC is the leading European consulting and analyst firm supporting software & IT service vendors worldwide. Since 1976, we have helped our clients to understand market dynamics, grow their revenue and raise their profile. Our unrivalled understanding of European markets, and deep research coverage help key market players to define their strategy, optimize their go-to-market and increase market share. PAC is an analyst-led consultancy with a team of over 100 experts across Europe. We provide market research and analysis on more than 30 countries worldwide, delivered through our portfolio pillars, Guidance, Insights, and Visibility, and our renowned SITSI® research platform.

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