

This is an excerpt of
Watt Hamlett Consulting's
**2022 SALESFORCE.ORG
PARTNER LANDSCAPE REPORT**



To purchase the full 156-page report, please visit
www.watthamlettconsulting.com



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FIRMS ON TOP

These are the consulting firms that made the most appearances among the 41 “Top” lists across the report (excluding “growth” lists, which are measured below in “Firms to Watch”).

Top 10 With Mega Partners

FIRM	NUMBER OF APPEARANCES IN “TOP” LISTS
Accenture	26
Deloitte Digital	26
Coastal Cloud	25
IBM	22
Capgemini	20
Slalom	18
Wipro	18
OSF Digital	16
Eigen X	14
VRP	14

Top 10 Without Mega Partners

FIRM	NUMBER OF APPEARANCES IN “TOP” LISTS
Coastal Cloud	25
OSF Digital	16
Eigen X	14
VRP	14
Redpath Consulting Group	13
Arkus, Inc.	12
Huron	12
MTX	12
Sercante	11
Cloud for Good	10
DemandBlue	10

Note: 2-way tie for 10th place



Insight

99 of the 128 total firms (77%) made it onto at least one “Top” list this year.



FIRMS TO WATCH

This report measures one-year numeric and percentage growth across the following 16 categories:

- Employees (percentage only)
- Consultants
- Projects
- CSAT (numeric only)
- Certifications – Overall
- Nonprofit Cloud Consultant Certifications
- Education Cloud Consultant Certifications
- Experience Cloud Consultant Certification
- Marketing Cloud Consultant Certifications
- Pardot Consultant Certifications
- Service Cloud Consultant Certifications
- Tableau CRM & Einstein Discovery Certifications
- Architect Certifications
- Developer Certifications
- Nonprofit Cloud Navigator Tier advance (numeric only)
- Education Cloud Navigator Tier advance (numeric only)



FIRMS TO WATCH (continued)

The following consulting firms had three or more appearances among the “Top” firms as measured by one-year growth in the 16 categories above:

By Numeric Growth

FIRM	NUMBER OF APPEARANCES IN ONE-YEAR GROWTH LISTS
Coastal Cloud	11
Slalom	11
Accenture	10
Deloitte Digital	10
VRP	9
Capgemini	8
Cloud for Good	7
Agile Cloud Consulting	5
Cloudalyze	5
DemandBlue	5
Huron	5
Jackson River	4
Attain Partners	3
Beyond the Horizon	3
Craftsman Technology Group	3
ebq	3
FusionSpan	3
Girikon	3
MST Solutions	3
Plative	3
Sercante	3



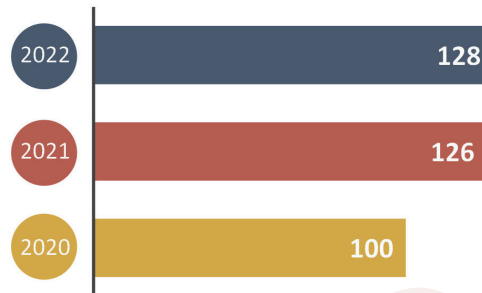
Insight

Every firm that made this list last year and was still an SFDO partner this year made this list again this year: **Accenture, Coastal Cloud, Cloud for Good, Deloitte Digital, Huron, and Slalom**. Coastal Cloud and Slalom went from tying for second place last year to tying for first.

Note: Only firms that were SFDO partners in both June 2022 and June 2021 were eligible for consideration in these growth categories.



TOTAL PARTNERS



ONE-YEAR GROWTH

2%

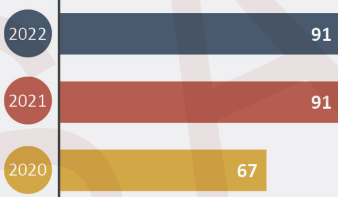
TWO-YEAR GROWTH

28%

FIVE-YEAR GROWTH

156%

NONPROFIT-ONLY PARTNERS

ONE-YEAR
GROWTH

0%

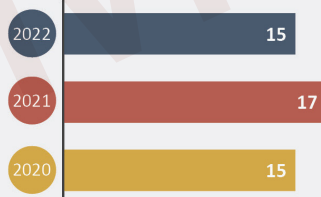
TWO-YEAR
GROWTH

36%

FIVE-YEAR
GROWTH

184%

EDUCATION-ONLY PARTNERS

ONE-YEAR
GROWTH

-11%

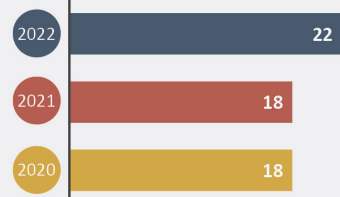
TWO-YEAR
GROWTH

0%

FIVE-YEAR
GROWTH

36%

NONPROFIT & EDUCATION PARTNERS

ONE-YEAR
GROWTH

22%

TWO-YEAR
GROWTH

22%

FIVE-YEAR
GROWTH

214%



Insight

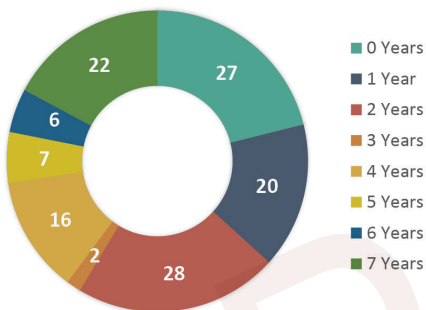
The headline for the year was “turnover.” Although SFDO added 27 new partners in 2022, 25 left the network, for a net gain of two. Compare that to 2021 when only three partners did not return to the program. Of the partners who did not return this year, two-thirds had only recently joined the partner network in 2020 or 2021.

Note: Partner counts are taken from the number of firms on the official Salesforce.org “Find a Partner” web page as of June each year.



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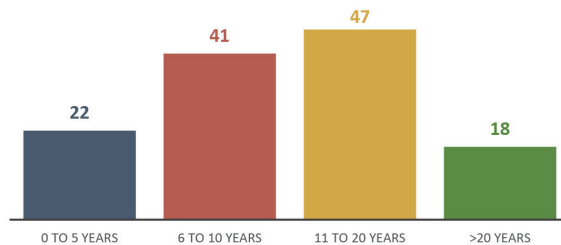
YEARS IN SFDO PARTNER NETWORK



Insight

58% of all SFDO partner firms joined between 2020 and 2022. Of the 128 partners in the SFDO program in 2022, 22 (17%) have been in the program since its inception in 2015.

YEARS IN BUSINESS



Insight

SFDO's partners are relatively mature businesses, with over half having been in business longer than ten years.



TOP 15 FIRMS BY EMPLOYEES

FIRM	EMPLOYEES
Accenture	623,288
IBM	532,400
Capgemini	308,336
Wipro	294,180
Slalom	11,752
Deloitte Digital	9,228
Merkle	6,452
Huron	4,446
Armanino	2,497
OSF Digital	1,927
MTX	1,089
Algoworks	673
Candoris (CDI)	644
VRP	581
Coastal Cloud	488



Insight

99.6% of all employees among SFDO Partners are represented by these top 15 firms.

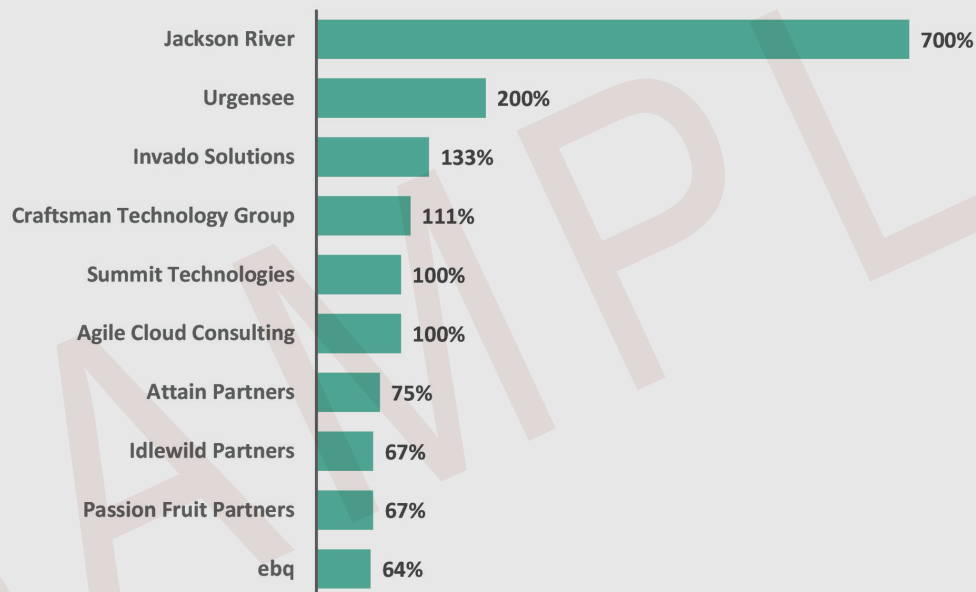
TOP 10 FIRMS BY ONE-YEAR INCREASE IN EMPLOYEES

FIRM	INCREASE
DTG Digital Transformation Group	140%
Passion Fruit Partners	114%
Buzzbold	100%
Cloud for Good	88%
Agile Cloud Consulting	86%
Scadea	81%
Tondro Consulting	75%
BlueGator Consulting	67%
Plative	64%
Craftsman Technology Group	63%



ONE-YEAR CHANGE

Top 10 Firms by One-Year Increase in Consultants
(by percentage)



Percentage Growth of Consultants



Insight

Craftsman Technology Group was the only firm whose consultant growth placed them in the top ten by both raw number and percentage growth. They grew from 18 consultants in 2021 to 38 consultants one year later.

Attain Partners, Urgensee, and Invado Solutions had the biggest turnarounds year-over-year, going from a net loss in consultants last year to top ten percentage growth this year.

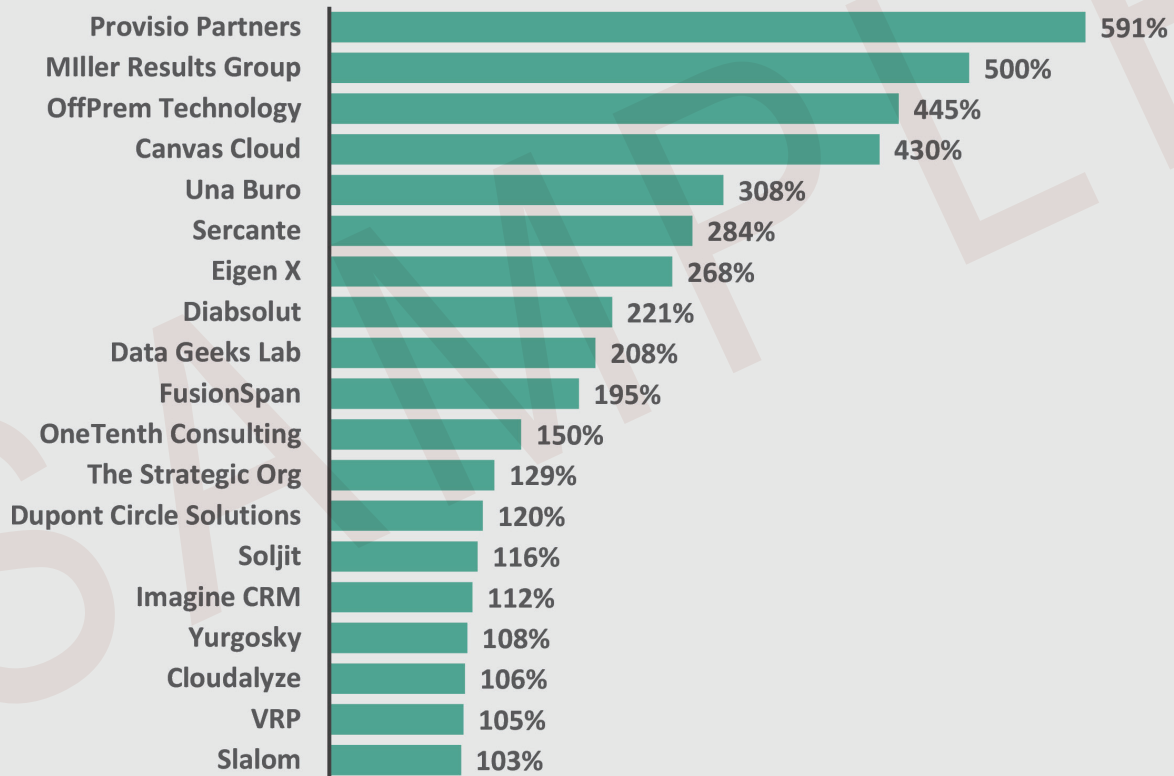
Note: This data only pertains to firms that were SFDO partners in both June 2022 and June 2021.



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TWO-YEAR CHANGE

Firms who doubled (or more) their project count in two years, from 2020 to 2022 (by percentage increase in projects)



Percentage Growth in Projects over Two Years

Note: These metrics pertain only to firms that were SFDO partners and on the AppExchange in both June 2022 and June 2020.



New in 2022

CSAT SCORES

As noted earlier, each project that a Salesforce consulting partner submits to Salesforce via the AppExchange results in a survey being sent to the client. The results of this survey automatically become part of the firm's Customer Satisfaction (CSAT) score, also known as the "star rating" on the AppExchange.

AVERAGE
CSAT SCORE

4.87

MEDIAN
CSAT SCORE

4.90

PERCENT OF FIRMS
WITH PERFECT
5.0 SCORES

23%



Insight

All of SFDO's Partner Network partners have CSAT scores above 4.5. This is a remarkable feat considering that only 38% of Salesforce's total global partners have achieved this.

CSAT HONOR ROLL

27 Firms with Perfect 5.0 Scores in 2022

Acutedge
Agile Cloud Consulting
Algoworks
Apphienz
Bigger Boat Consulting
BlueGator Consulting
Buzzbold
BWF
Cathexis Partners

Coastal Cloud
DTG Digital Transformation Group
Eigen X
IBeam Partners
JourneyBlazers
Miller Results Group
MustardSeed
Passion Fruit Partners
Redpath Consulting Group

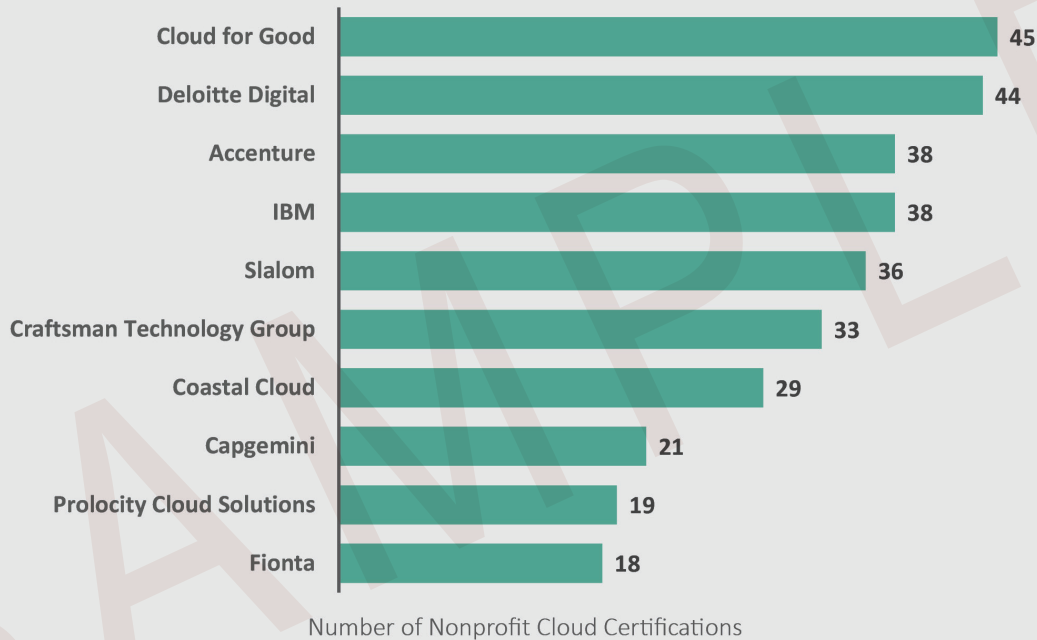
Sputnik Moment
Summit Technologies
The CRM Firm
The Strategic Org
Tondro Consulting
Violet Consulting
Vision Point Systems
Webfactory Solutions
Yurgosky



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NONPROFIT CLOUD CERTIFICATIONS TOP 10 FIRMS

All Tiers



PERCENTAGE OF ALL
FIRMS WITH AT LEAST
ONE CERTIFICATION

91%

-3% YOY

AVERAGE NUMBER
PER FIRM*

7

+1 YOY

MEDIAN NUMBER
PER FIRM*

3

No Change YOY

*Among firms who hold at least one.



Insight

More firms in the SFDO partner network have a Nonprofit Cloud certification among their staff than any other type of consultant certification.



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67

EDUCATION CLOUD CERTIFICATIONS TOP 5 FIRMS

by Percent of Consultants

Premium Tier

Elevation Solutions	88%
Servio Consulting	75%
akaCRM	50%
Candoris (CDI)	40%
Cloud for Good	36%

Impact Tier

Eigen X	36%
Sleek Consulting	29%
Redpath Consulting Group	25%
Yurgosky	25%
Agile Cloud Consulting	17%

Registered Tier

Quixo Consulting	100%
Tondro Consulting	100%
Violet Consulting	100%
BWF	50%
OneTenth Consulting	50%
Tipping Point Consulting	50%

Note: 3-way tie for 3rd place



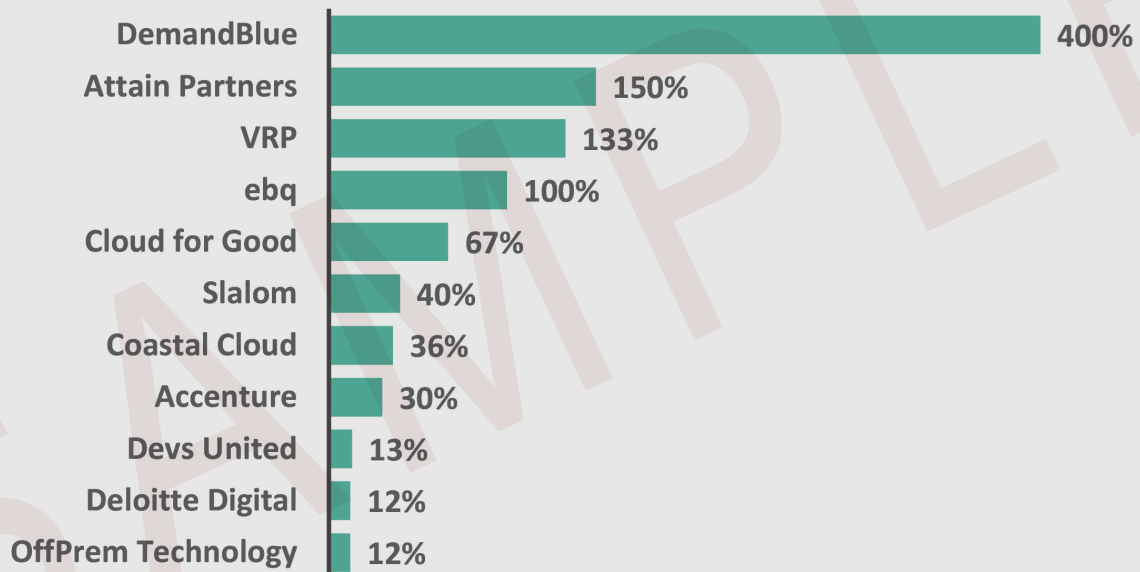
Insight

Elevation Solutions, Candoris (CDI), and OneTenth Consulting are the only firms to rank in the top five in their respective tiers for percentage of consultants for both Education Cloud and Nonprofit Cloud certifications.



MARKETING CLOUD CERTIFICATIONS ONE-YEAR CHANGE

Top 10 Firms by One-Year Increase in Certifications
(by percentage)



Percentage Increase in Marketing Cloud Certifications

Note: 2-way tie for 10th place



Insight

This is the only certification type in the report where **all ten firms are identical** for both year-over-year growth in raw numbers and by percentage increase.

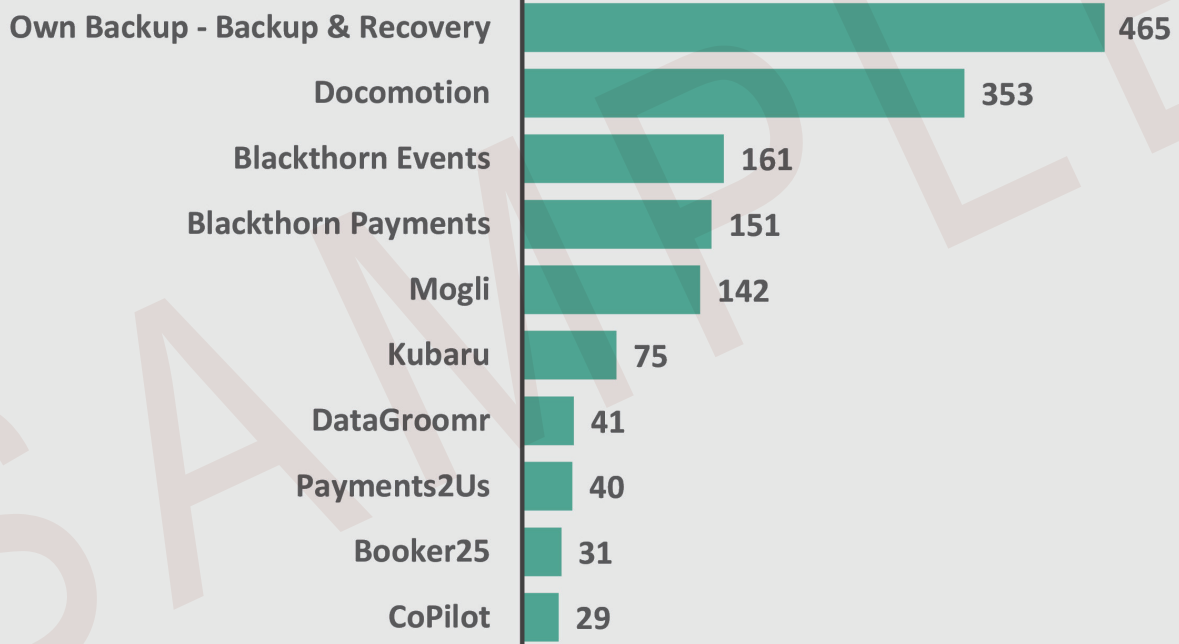
Note: This data only pertains to firms that were SFDO partners in both June 2022 and June 2021.



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MOST 5 STAR REVIEWS

Top 10 Apps (by number of reviews)



SI FIRMS BY CONSULTANT COUNT

Total consultant counts are as of June 2022 for firms with AppExchange listings. One-year and two-year changes apply only where the firm was also an SFDO partner as of June 2021 and June 2020, respectively. N=117

SI FIRM	TOTAL CONSULTANTS	ONE-YEAR CHANGE	TWO-YEAR CHANGE
Accenture	10,438	48%	79%
Deloitte Digital	5,538	31%	57%
Capgemini	3,392	46%	-
Wipro	3,207	-	-
IBM	2,657	-	-
Slalom	1,248	36%	77%
OSF Digital	391	-	-
MTX	355	-	-
Coastal Cloud	307	42%	83%
VRP	241	56%	136%
Huron	176	38%	73%
MST Solutions	131	16%	54%
Algoworks	117	-	-
Zennify	99	-	-
Cloud for Good	94	42%	52%
CloudQ	92	-	-
DemandBlue	84	27%	-
Girikon	71	11%	-
Mirketa	67	-	-
Diabsolut	63	21%	75%
Sercante	58	53%	100%
Spark.Orange	43	-	-
Plative	39	63%	63%
Craftsman Technology Group	38	111%	192%
Arkus, Inc.	33	32%	43%
Cloudalyze	32	23%	45%
Redpath Consulting Group	32	14%	14%
FusionSpan	30	30%	88%
Prolocity Cloud Solutions	30	30%	76%
Synaptic Advisors	30	-	-

SI FIRM	TOTAL CONSULTANTS	ONE-YEAR CHANGE	TWO-YEAR CHANGE
Attain Partners	28	75%	47%
Exponent Partners	28	22%	27%
OffPrem Technology	27	8%	80%
Pacific Point	27	-	-
CRMScience	26	8%	24%
Fionta	25	9%	56%
List Engage	24	0%	-
Provisio Partners	24	-8%	20%
ebq	23	64%	-
Eigen X	22	22%	57%
Apex IT	21	11%	62%
Beyond the Horizon	21	50%	62%
Idealist Consulting	21	31%	31%
Vera Solutions	21	40%	31%
Candoris (CDI)	20	-5%	33%
Dupont Circle Solutions	20	5%	33%
Echo Technology Solutions	19	19%	73%
Soljit	19	12%	46%
akaCRM	18	6%	-5%
M&S Consulting	17	42%	42%
Cloud Creations	16	7%	-11%
EightCloud	16	14%	-6%
Jackson River	16	700%	700%
Devs United	14	17%	56%
Belmar	13	8%	44%
Flexsin	13	-	-
Agile Cloud Consulting	12	100%	-
Summit Technologies	12	100%	140%
Heller Consulting	11	0%	-8%
KELL Partners	11	-52%	-52%



What's In the Full Report?

This 156-page report is jam-packed with data and insights. It contains nearly 200 charts, tables and metrics and over 80 unique insights. Here is the full table of contents. **Items colored red are new for 2022.**

- **Key Findings**

- ▶ Top Findings
- ▶ Firms On Top
- ▶ Firms To Watch

- **Partner Landscape**

- ▶ Total Partner Count and 1-, 2-, and **5-Year Growth**
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 - Total Partner Count and Growth - Education Only
 - Total Partner Count and Growth - Nonprofit & Education
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- ▶ Partners by Years in SFDO Network
- ▶ Partners by Years in Business
- ▶ Partners by Geography
- ▶ New Partners for 2022, by Industry and Tier
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 - By Consultant Count
 - By Certification Count
 - By Nonprofit Cloud Certification Count
 - By Education Cloud Certification Count
 - By Projects Completed
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- ▶ Partners Dropping a Partnership Tier
- ▶ Partners Changing Verticals
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- ▶ **SFDO Consulting Partners of the Year 2021-2022**
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- ▶ Employees
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- ▶ Inc. 5000 Awardees

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- ▶ Median/Average Growth of Consultants
- ▶ Top 10 Firms by One-Year and Two-Year Consultant Growth (Numeric & Percentage)
- ▶ Firms with One-Year Net Loss in Consultants

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- ▶ Firms by Project Count + Median/Average of All Firms
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- ▶ Top 5 Firms by Sector and Partner Tier
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- ▶ Top 10 Firms by Number of Projects per Consultant
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- ▶ Top 10 Firms by One-Year and Two-Year Project Growth (Numeric & Percentage)
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 - Firms with Perfect 5.0 scores One-Year and Three-Year
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- ▶ Top 10 Firms by One-Year and Two-Year Certification Growth (Numeric & Percentage)
- ▶ Firms with One-Year Net Loss in Certifications
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 - Top 10 Firms by One-Year Increase in Certifications (Numeric & Percentage)
- ▶ Education Cloud Certifications:
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 - Top 5 Firms by Percentage of Consultants by Partner Tier
 - Top 10 Firms by One-Year Increase in Certifications (Numeric & Percentage)
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 - Top 10 Firms by Count + Median/Average with One-Year Change
 - Percentage of Firms with Certifications + One-Year Change
 - Top 5 Firms by Percentage of Consultants by Partner Tier
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- ▶ Service Cloud Certifications:
 - Top 10 Firms by Count + Median/Average with One-Year Change
 - Percentage of Firms with Certifications + One-Year Change
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- ▶ Pardot Certifications:
 - Top 10 Firms by Count + Median/Average with One-Year Change
 - Percentage of Firms with Certifications + One-Year Change
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- ▶ Tableau CRM & Einstein Discovery Certifications:
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- ▶ Developer Certifications:
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 - Percentage of Firms with Certifications + One-Year Change
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• Navigator

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- ▶ Marketing Cloud Account Engagement (formerly Pardot)
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- ▶ Einstein
 - Number/Percentage of Firms with Status/One-Year Change
 - Percentage of Firms by Navigator Tier
- ▶ Managed Services
 - Number/Percentage of Firms with Status/One-Year Change
 - Percentage of Firms by Navigator Tier
 - Firms with Expert Status
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 - ▶ SFDO Product Partners of the Year 2021-2022
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 - ▶ Inc. 5000 Awardees
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 - ▶ Apps by Category by Sector
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 - ▶ Top 10 Apps with Most 5.0 Star Reviews
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 - ▶ Full List of All Partners by Employee Count and One-Year Percentage Change
 - ▶ Full List of All Partners by Consultant Count and One- and Two-Year Percentage Change
 - ▶ Full List of All Partners by Project Count and One- and Two-Year Percentage Change
 - ▶ Full List of All Partners by Certification Count and One- and Two-Year Percentage Change
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 - ▶ Full List of All Partners with Nonprofit Cloud Navigator Status, with Overall Status and Specializations
 - ▶ Full List of All Partners with Education Cloud Navigator Status, with Overall Status and Specializations

- ▶ Full List of All Partners with Experience Cloud Navigator Status, with Overall Status and Specializations
- ▶ Full List of All Partners with Service Cloud Navigator Status, with Overall Status and Specializations
- ▶ Full List of All Partners with Marketing Cloud Navigator Status, with Overall Status and Specializations
- ▶ Full List of All Partners with Marketing Cloud Account Engagement (formerly Pardot) Navigator Status, with Overall Status and Specializations
- ▶ Full List of All Partners with Einstein Navigator Status, with Overall Status
- ▶ Full List of All Partners with Managed Services Navigator Status, with Overall Status
- ▶ ISV Apps by Industry Collection and Category, with Years on AppExchange, Rating, and Review Count



What people said about the 2021 edition:

“This report provided incredible insight into the competitive landscape for Traction on Demand and gave me the opportunity to both validate and evolve my go to market strategy. This is the most comprehensive assessment of the partner community that serves nonprofit and education customers in the Salesforce ecosystem.”

— Jessica Langelaan, Vice President of Nonprofit Solutions, Traction On Demand

“WHC’s report arrived at just the right time for us to be able to incorporate its insights into our Salesforce practice plans for the year. Thanks to this valuable resource, we were able to be even more data-driven in our strategic growth planning.”

— Susan Tobes, Senior Director, Strategic Growth, Attain Partners

“Watt Hamlett is one of our most trusted sources about the Salesforce.org ecosystem for nonprofits, and he has created an unsurpassed resource for better understanding the companies working in that space.”

— David Deal, Partner, Build Consulting

“If you're an ISV partner looking to build relationships, this report cuts through the noise and will save you time and money. Well done, Watt!”

— Ryan Ross, Head of Sales & Business Development, Golden

“Watt Hamlett has created a go-to resource for Salesforce partners in the nonprofit and education sectors.”

— Tiffany Spencer, CEO, Tech Forward

“As a new Salesforce.org partner, this report was extremely useful in helping us understand the partner landscape and the kind of practice growth that’s possible.”

— Jason Boley, Senior Vice President, BWF

“Our sector is so fortunate that Watt Hamlett has made his insights available to organizations through this report. I recommend this report to any Salesforce.org consulting firm that wants to better understand how it compares to its peers.”

— Alice Hendricks, Principal & Founder, Cause Craft Consulting

“Well done Watt Hamlett! Our industry needs more great insights like this.”

— Ryan Ozimek, Co-Founder & CEO, PICnet

“This report is an excellent tool. The data provided was used to help confirm the areas where our company has excelled and highlighted areas for growth.”

— Aries Cyrus-Sims, Nonprofit Development Director, ImagineCRM

“As an unbiased nonprofit strategist and technology coach, I work with organizations of all sizes, missions, and budgets to help them find the right technology and use it effectively. Watt Hamlett has been my trusted advisor on the Salesforce.org ecosystem for years, and I value the insights he’s made available through this report.”

— Maureen Wallbeoff, Nonprofit Digital Strategist & Technology Coach

“WHC has compiled an extensive and detailed view of the Salesforce.org consulting partner ecosystem.”

— Gary Lam, Founder and President, Kokua



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PARTNER LANDSCAPE REPORT**



To purchase the full 156-page report, please visit
www.watthamlettconsulting.com



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