



# Salesforce Services

Market Analysis  
Abstract

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[research.nelson-hall.com](http://research.nelson-hall.com)





## Who Is This Report For?

NelsonHall's "Salesforce Services" report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within IT services
- Vendor marketing, sales and business managers developing strategies to target Salesforce service opportunities
- Financial analysts and investors specializing in the IT services.

## Scope of the Report

The report analyzes the worldwide services market for Salesforce services. It addresses the following questions:

- What is the current and future market for Salesforce services?
- What are the client segments for Salesforce services, and their characteristics? What are the drivers, benefits, and inhibitors for each segment?
- What is the size and growth of the Salesforce services markets by client segment, geography, service line, activity, and sector?
- How did spending grow in 2017 and how will it increase in 2018 and onwards, until 2022?
- How is the market organized? Who are the main vendors? How can they be assessed and compared? What are vendors' challenges and critical success factors by market segment?
- What are the offerings in the market?
- How are Salesforce services shaping?



## Key Findings & Highlights

NelsonHall's market analysis of the Salesforce services consists of 62 pages. It provides an in-depth understanding of the dynamics at play in the Salesforce services market.

The Salesforce services market is a dynamic market. Current spending is limited, to ~\$5.6bn. But growth potential is very high (2017-2022 CAGR of 17%).

There are two main drivers for the growth of the Salesforce services. At the core is the success of Salesforce, which has emerged from a niche (sales force automation) and has become the leader in front-office software (including CRM, e-commerce, contact center, and marketing applications) and also a platform on which clients are creating their software. Also, Salesforce is a high-growth story with its service ecosystem growing as fast.

North America is the largest geography for Salesforce services. By far, with spending in 2022 reaching \$8.3bn, three times as much as in EMEA.

Systems integration is the largest area of spending.

Sales Cloud (the former CRM product) currently is the largest service market, with \$2.0bn in spending in 2017. Service Cloud (contact center software) is the second largest, with \$1.7bn in related service spending.

Salesforce has indicated that it would focus its vertical efforts on six large industries: financial services, manufacturing, communication & media, healthcare, and life science, retail, and public sector. These six industries represent 80% of the subscription revenues of Salesforce and its largest service opportunity.

Accenture, Salesforce, and Deloitte lead the market and challenged by IBM - Bluewolf, Capgemini, and Cognizant.

## Contents

1. Changing Shape of the Salesforce Services Market

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2. Customer Requirements

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3. Market Size and Growth

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4. Vendor Market Shares

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5. Vendor Delivery Capabilities and Trends

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6. Vendor Offerings and Targeting

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7. Vendor Challenges and Success Factors

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- Appendix 1: Vendors Researched for Analysis

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- Appendix 2: List of Salesforce-related acquisitions since 2015

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## Report Length

62 slides, consisting of seven chapters.

## Vendors Researched

Accenture, BearingPoint, Cognizant, DXC Technology, IBM Bluewolf, Infosys, NTT DATA, Sopra Steria, TCS, Tech Mahindra, T-Systems, and Wipro Appirio.

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