



Salesforce Services

Market Analysis
Abstract

December 2018
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

2. Customer Requirements

3. Market Size and Growth

4. Vendor Market Shares

5. Vendor Delivery Capabilities and Trends

6. Vendor Offerings and Targeting

7. Vendor Challenges and Success Factors

- Appendix 1: Vendors Researched for Analysis

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

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.

Report Author

Dominique Raviart

dominique.raviart@nelson-hall.com