



# Market Analysis

## IT Services

# Salesforce Services: Industrialization & Verticalization

### Report Abstract

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By Dominique Raviart

IT Services Practice Director

NelsonHall

52 pages

### Contents of Full Report

1. Changing Shape of the Salesforce Services Market
2. Client Requirements
3. Market Size and Growth
4. Vendor Market Shares
5. Vendor Offerings and Targeting
6. Vendor Delivery and Trends
7. Vendor Challenges and Success Factors

Appendix I – List of M&As

Appendix II – Vendors Researched

## Who is This Market Analysis For?

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

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

## Key Findings & Highlights

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NelsonHall's market analysis of the Salesforce services market consists of 52 pages. The report 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 ~\$9.2bn. Despite the pandemic and several sectors impacted by the crisis, service spending will be high in 2020, up by ~22.

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 become the leader in front-office software (including CRM, commerce, contact center, and marketing applications) and also a platform on which clients are creating their software. Salesforce intends to double its size between 2019 and 2023 organically. Services will also double during the same period, reaching, by 2024, ~\$21.8bn.

The U.S. is the largest market. Salesforce is focusing on international markets to sustain its growth. Service spending is increasing in international markets, even though the U.S. remains the largest geo. If Salesforce makes further significant acquisitions as NelsonHall expects, these M&As will strengthen the service opportunity in the U.S.

Sales and Service Clouds are the largest markets and have kept growing in 2020, despite their maturity. Service Cloud has been driven by clients investing in contact centers during the pandemic. New products (e.g., Community, Marketing, Commerce, MuleSoft, quote-to-cash, Lightning Field Services and the vertical Clouds) will drive adoption.

BFSI, Communications, and Healthcare & Life Sciences are the largest Salesforce services markets. These three sectors have done well during the pandemic and maintained their investments. Healthcare & Life Sciences will become the largest spender, followed by BFSI and Communications. Retail & CPG and Manufacturing will resume spending once they absorb the disruption brought by the pandemic.

## Scope of the Report

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The report analyzes the worldwide market for Salesforce services and 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 2020-21 and how will it increase in the next five years?
- 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?

## Salesforce Services Vendor Assessments Available for:

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- Accenture
- Capgemini
- Cognizant
- DXC Technology
- Grazitti Interactive
- Hexaware
- Infosys
- Mindtree Magnet360
- NTT DATA
- Persistent Systems
- Salesforce
- TCS
- Tech Mahindra
- T-Systems
- Wipro Appirio.

## About The Author

Dominique Raviart is the IT Services Practice Director at NelsonHall, with global responsibility for IT Services research programs.

Dominique covers IT Services research in the areas of Software Testing/QA, Big Data and Analytics Services, Salesforce services, and IoT Services. Dominique has been part of NelsonHall's IT Services analyst team since 2007, providing comprehensive and insightful coverage of IT services markets in the world. In particular, he is widely known for his extensive knowledge and coverage of software testing, having examined recently digital testing and DevOps/continuous testing. Dominique assists both buy-side and vendor organizations in assessing opportunities and supplier capability across IT service lines.

Dominique can be contacted at:

- Email: [dominique.raviart@nelson-hall.com](mailto:dominique.raviart@nelson-hall.com)
- Twitter: [@DominiqueR\\_NH](https://twitter.com/DominiqueR_NH)



## About NelsonHall

NelsonHall is the leading global analyst firm dedicated to helping organizations understand the 'art of the possible' in digital operations transformation. With analysts in the U.S., U.K., and Continental Europe, NelsonHall provides buy-side organizations with detailed, critical information on markets and vendors (including NEAT assessments) that helps them make fast and highly informed sourcing decisions. And for vendors, NelsonHall provides deep knowledge of market dynamics and user requirements to help them hone their go-to-market strategies. NelsonHall's research is based on rigorous, primary research, and is widely respected for the quality, depth and insight of its analysis.

We would be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager: Guy Saunders at [guy.saunders@nelson-hall.com](mailto:guy.saunders@nelson-hall.com)

### Boston

Riverside Center, 275 Grove Street, Suite 2-400, Newton Massachusetts 02466  
Phone: +1 857 207 3887

### London

Unit 6, Millars Brook, Molly Millars Lane, Wokingham, RG41 2AD  
Phone: + 44(0) 203 514 7522

### Paris

4 place Louis Armand, Tour de l'Horloge, 75012 Paris  
Phone: + 33 1 86266 766

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