HFS HORIZONS REPORT

Salesforce Service Providers, 2025

An assessment of the leading service providers in Salesforce innovation

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Excerpt for Publicis Sapient

Salesforce is at the forefront of transforming customer experiences as enterprises move from modular deployments to holistic transformation engagements. Now, generative AI(GenAI) and Agentforce have the potential to redefine how organizations interact with their customers, and enterprises are turning to service providers to make it a reality.

In response, leading service providers are working to quickly upskill their workforces, expand industry expertise, build stronger ecosystems, and embrace innovative ways of working to help enterprises get the most out of their Salesforce investments.

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Introduction and research methodology

Introduction

Organizations of all sizes are increasingly prioritizing customer-centric approaches. This means a growing focus on real-time engagement, enhanced focus on data privacy, and developing new omnichannel experiences. To get there, enterprises often turn to service firms to help them plan, implement, and manage software-as-a-service solutions—including Salesforce.

- The **HFS Horizons: Salesforce Services, 2024** report assesses how well service providers are helping their Salesforce clients to embrace innovation and realize value across three distinct Horizons:
  - **Horizon 1:** The ability to drive functional optimization outcomes through cost reduction, speed, and efficiency.
  - **Horizon 2:** Horizon 1 + enablement of the OneOffice model of end-to-end organizational alignment across the front, middle, and back offices to drive unmatched stakeholder experience.
  - **Horizon 3:** Horizon 2 + the ability to drive the **OneEcosystem** synergy via collaboration across multiple organizations with common objectives around driving completely new sources of value.
- The report evaluates the capabilities of **19 service providers** across the HFS Salesforce services value chain based on a range of dimensions to understand the **why, what, how,** and **so what** of their offerings.
- It highlights the **value-based positioning** for each participant across the three distinct Horizons. It also includes **detailed profiles** of each service provider, outlining their **provider facts, strengths, and development opportunities.**
- The report is **global in scope** and offers critical insights for enterprises of all shapes and sizes, service providers offering Salesforce services, and ecosystem partners.

Executive summary

1

The leaders

HFS assessed 19 service providers across value propositions, innovation capabilities, go-to-market strategies, and market impact criteria. The leaders in Horizon 3 are Accenture, Cognizant, Deloitte, IBM, Infosys, Publicis Sapient, PwC, and TCS. These providers demonstrated their ability to help enterprises of all sizes drive ecosystem value, create new experiences, and develop 360-degree views of customers through Salesforce. There were a handful of shared characteristics among the leaders, including strong capabilities across the full Salesforce suite of products, deep expertise in key industries, a strong focus on innovation and co-creation with clients, and an established ecosystem of partners to pull into engagements.

2

Enterprises still battle license costs

Enterprises are becoming increasingly cost-conscious as macroeconomic headwinds force them to prioritize their spending ruthlessly, and this is impacting Salesforce services expenditure too. One of the top priorities of 2024 was license optimization to reduce costs. Service providers are arming themselves with the tools to make this a reality, helping enterprises to analyze usage and ensure full use of features to drive down cost and extract maximum value from existing investments. This is particularly important as enterprises look to fund Salesforce Data Cloud and Agentforce investments.

3

Industry-specific solutions continue to grow

Salesforce is driving the adoption of industry-specific solutions by launching Health Cloud and Financial Services Cloud, which allow enterprises to leverage tailored tools, workflows, and integrations designed for unique industry-specific applications. For example, Health Cloud helps firms create patient-centric experiences, while Financial Services Cloud offers compliance-ready tools and solutions. Service providers are complementing these solutions with deep domain expertise, their own tools and accelerators, and integrating emerging technologies such as automation and AI to accelerate implementation times and drive improved outcomes.

4

AI as a transformative force in the ecosystem

Salesforce is embedding AI features into its own suite of products. Salesforce Einstein is a familiar name in the industry, and the company recently announced the Agentforce 2.0—a platform that delivers a 'limitless workforce' using AI agents. Service providers are already working to develop their own AI toolkits and upskill their existing talent to ensure they help enterprises navigate the rise of AI—some are even driving co-innovation with their clients. However, at the core of AI for Salesforce is Data Cloud, which pulls real-time data from multiple sources to feed tools such as Agentforce. We're seeing a significant rise in the number of enterprises seeking support for complex Data Cloud implementations, including data strategies, to ensure they are well-equipped to drive transformation with AI.

5

Voice of the customers and partners

Enterprises across the board report satisfaction with their service providers' understanding of Salesforce's suite of products, service quality, and geographic reach. However, there was widespread agreement that the providers should focus on achieving more cost savings, developing deeper industry-specific expertise, and driving greater revenue impact for their clients. Partners have appreciated their strong execution capabilities but highlighted the need to enhance collaborative innovation and embrace ecosystems to drive more value for their enterprise clients.

The HFS Salesforce services value chain

The HFS Salesforce Service Providers 2025 report looks beyond implementation and IT-centric use cases for innovation and transformation. Key aspects include transformational outcomes, industry-specific solutions, and innovative use cases, and therefore, we focus on the enterprise and service provider view.

Enterprise view	Enhanced customer relationships	Improved sales efficiency	Effective marketing campaigns	Customization and innovation
	• 360-degree customer view • Community engagement • Feedback collection • Customer journey mapping • Continuous improvement	• Intelligent AI-driven insights • Improved lead management • Automated sales processes • Opportunity management • Sales forecasting and reporting • Integration with marketing	• Automated marketing campaigns • Enhanced personalization • Customer journey mapping • Multi-channel engagement • Advanced analytics and insights • Intelligent targeting • Integration with sales and servicing	• Integration with other tools and applications • Workflow automation • Custom applications • Agile development • Training and support

Service provider view	Envisage	Implement	Manage	Operate	Innovate
	• Discovery sessions • Business case development • Cloud readiness assessment • Cloud advisory services • Compliance, risk management, and security consulting • CRM and strategy consulting • Salesforce strategy, consulting, process design, and configuration support • Technical change management consulting • Governance structure	• Onboarding • Project management • Data consulting and management • Custom development services to comply with industry, geography, or other business requirements • Integration services • Salesforce extensions or tools to meet specific client needs • Testing	• Governance management • Upgrade support • Salesforce helpdesk • Ongoing integration • Ongoing testing • Ongoing training • Ongoing proactive advice sharing best practice • Ongoing employee adoption support • Testing and QA • Periodic solution and service delivery reviews	• Module value identification • Salesforce module adds and upgrades, migrations, and consolidation • Ongoing CRM strategy and system alignment • CRM analytics and measurement • Medium to long-term Salesforce roadmap advisory services • Performance management • Regulatory adjustment	• Build a 360-degree view of customers • Leverage AI to enable data-driven decisions • Streamline business processes through automation • Industry-specific ecosystems • Operational resilience • License optimization • Agile funding methods • Sustainability and net zero agenda • Business assurance

19 service providers have been evaluated in this report

accenture
cognizant
Deloitte.
Dextara DATAMATICS
Globant
IBM
Infosys
KPMG
LTIMindtree
movate
Mphasis SILVERLINE The Next Applied
NTT DATA
Persistent
publicis sapient
pwc
randstad digital
tcs TATA CONSULTANCY SERVICES
TECH mahindra
virtusa

Note: All service providers are listed alphabetically

Sources of data

This Horizons research report relies on multiple data sources to support our methodology and help HFS obtain a well-rounded perspective on the service capabilities of the participating organizations covered in our study. The sources are as follows:

Briefings and information gathering

HFS conducted detailed **briefings** with Salesforce leadership from each vendor.

Each participant submitted a specific set of **supporting information** aligned to the assessment methodology.

Reference checks

We conducted reference checks with **26 active clients and 20 active partners** of the study participants via surveys and interviews.

HFS Pulse

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions.

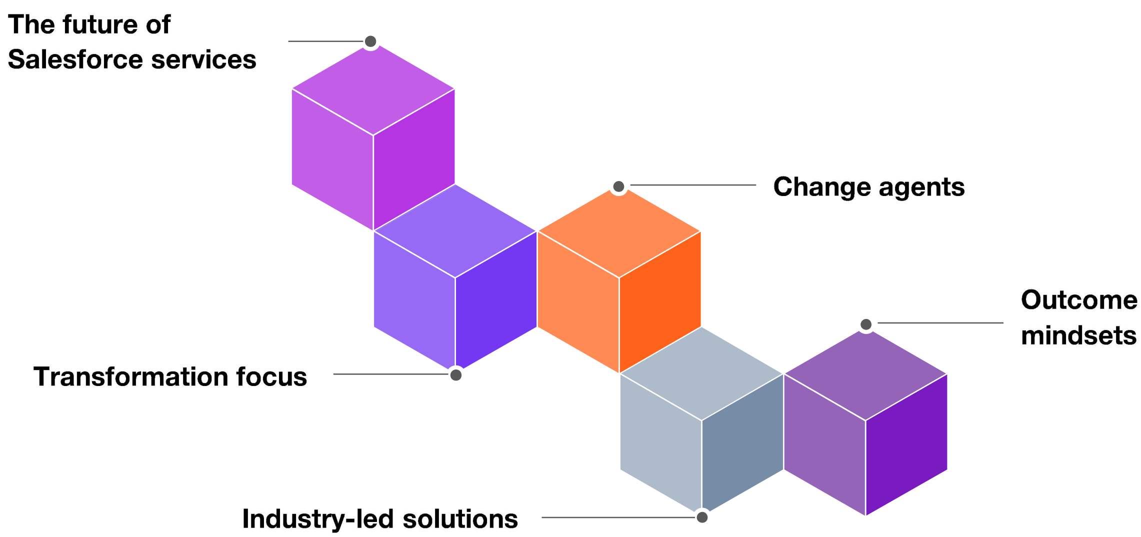
For this study, we leveraged our fresh-from-the-field HFS Pulse study data featuring **15 service provider ratings from Salesforce decision-makers at enterprises.**

Other data sources

Public information such as news releases and websites.

Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

The study seeks to address multiple questions



The future of Salesforce services

What is your vision for delivering Salesforce services in the future? How are you aligning it with broader ecosystem initiatives?

Transformation focus

How do you help organizations capture value, such as improved customer experiences, by transforming their operations today?

Industry-led solutions

What is your progress with industry-led solutions? What are the experiences?

What is on your roadmap?

Change agents

How do you leverage change agents such as automation and AI while delivering Salesforce services?

Outcome mindsets

What are the key outcomes you're helping enterprises achieve with Salesforce? How are you enhancing customer relationships and driving sales and marketing campaigns?

Horizons assessment methodology: Salesforce service providers

The **HFS Horizons: Salesforce Services** report evaluated service providers' capabilities across a range of dimensions to understand the **why, what, how, and so what** of their Salesforce offerings. Our assessment is based on inputs from clients, partners, and employees and augmented with analyst perspectives.

Assessment dimension (weighting)

Assessment dimension	Assessment sub-dimension	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
Value proposition: The why? (25%)	Strategy and roadmap Clarity of vision for Salesforce services and nature of outcomes Differentiators—why clients work with you	• Ability to drive **functional optimization outcomes** with selective Salesforce capabilities	• Horizon 1 + • Ability to drive real **business, experience-led outcomes and stakeholder experiences** whilst achieving enterprise-wide transformations	• Horizon 2 + • Ability to drive **ecosystem synergy** via collaboration across multiple organizations with common objectives around driving completely **new sources of value**
Innovation capabilities: The what? (25%)	Breadth and depth of services across the Salesforce value chain Strength of talent pool Innovative solutions (industry-specific, ESG, etc.)	• Strong **implementation capabilities** • Deep engineering capabilities driving speed and efficiency • Offshore-focused with strong technical skills	• Horizon 1+ • Ability to support clients on their **end-to-end** Salesforce transformation journey • Global capabilities with strong consulting and domain expertise across the Salesforce portfolio	• Horizon 2 + • Strategy and execution capabilities at scale • Leveraging Salesforce to create 360-degree views of customers to drive **new experiences**
Go-to-market (GTM) strategy: The how? (25%)	What transformative outcomes are you pitching to clients? Nature of investments in your Salesforce business (M&A, training, R&D) Co-innovation and collaboration approaches with customers and partners Assuring outcomes	• Robust fundamentals of Salesforce transformation • Technology and capability focus	• Horizon 1+ • Proven and leading-edge **proprietary assets,** including **industry-led solutions** • Clear **articulation of the transformation outcomes** • Capability to deliver end-to-end transformation with ongoing multi-year managed services	• Horizon 2 + • **Driving co-creation with clients** and ecosystem partner • Effectively **envisioning outcomes** and providing business assurance for Salesforce transformation
Market impact: The so what? (25%)	Scale and growth of Salesforce business (revenue, clients, headcount) Proven outcomes showcasing transformation Voice of the customer	• Referenceable and satisfied clients for the ability to execute technology transformation	• Horizon 1+ • Referenceable and satisfied clients for the ability to drive business transformation	• Horizon 2 + • Referenceable and satisfied clients driving new business models based on the partnership

2

Market dynamics

Our key learnings while conducting this study (1/2)

1

One-size-fits-all is no longer an option

Salesforce implementations are becoming increasingly complex as enterprises operate with different levels of digital maturity, with individual challenges and desired outcomes. Service providers have been forced to evolve beyond standardized delivery models to ones with flexibility at the core and a deep understanding of each client's unique circumstances, for example, operating in heavily regulated industries. Salesforce recognized this with its new infrastructure, Hyperforce, which allows the use of major public clouds and enables enhanced flexibility among other benefits, meaning enterprises can drive incremental transformation with a tailored roadmap.

2

Pricing continues to be a top challenge

Enterprises across the board expressed frustration around complex and opaque cost models, ranging from pay-as-you-go to tiered licensing models. For example, Agentforce is priced at $2 per conversation. This remains a roadblock to transformation as enterprises struggle to justify further spending on the likes of Data Cloud and Agentforce until they optimize their current licensing costs. Savvy service providers are working with Salesforce to introduce outcome-based pricing. Others are combining tools such as Salesforce Optimizer with their own expertise to help clients maximize existing investments and align them to tangible business outcomes.

3

Data and AI are driving innovation

Salesforce Data Cloud and Agentforce are two of Salesforce's flagship products, but they require significant investment in time and money before delivering maximum value. Enterprises rely on service providers to make this a reality, and forward-thinking firms are already reaping the rewards as they benefit from real-time insights and personalized customer experiences. Throughout our conversations with enterprises, we heard use cases ranging from automated content generation to conversational commerce and intelligent case management.

4

Industry-specific clouds continue to rise

In response to the growing need for tailored solutions (see first point), Salesforce is developing its catalog of purpose-built clouds with industry-specific workflows, integrated compliance tools, and customer dashboards. Enterprises are turning to industry clouds to benefit from domain expertise, accelerated implementation times, and support with regulatory compliance, among a host of other unique benefits. However, enterprises tell us they still face challenges with additional license fees having complex cost structures, tricky integrations with their existing legacy systems, and customization issues that bring their own set of problems.

Our key learnings while conducting this study (2/2)

5

Co-innovation is becoming a differentiator

Enterprises are increasingly taking ownership of their technology initiatives rather than outsourcing them, which is why co-innovation is growing exponentially. It allows enterprises to jointly test and deploy customized solutions and bespoke applications and future-proof their infrastructure against upcoming technologies. Smart service providers are already establishing joint innovation studios with their clients, typically leveraging outcome-based models to explore exciting opportunities such as GenAI applications. While co-innovation is a differentiator today, we expect it to become commonplace in the Salesforce ecosystem if providers wish to remain competitive.

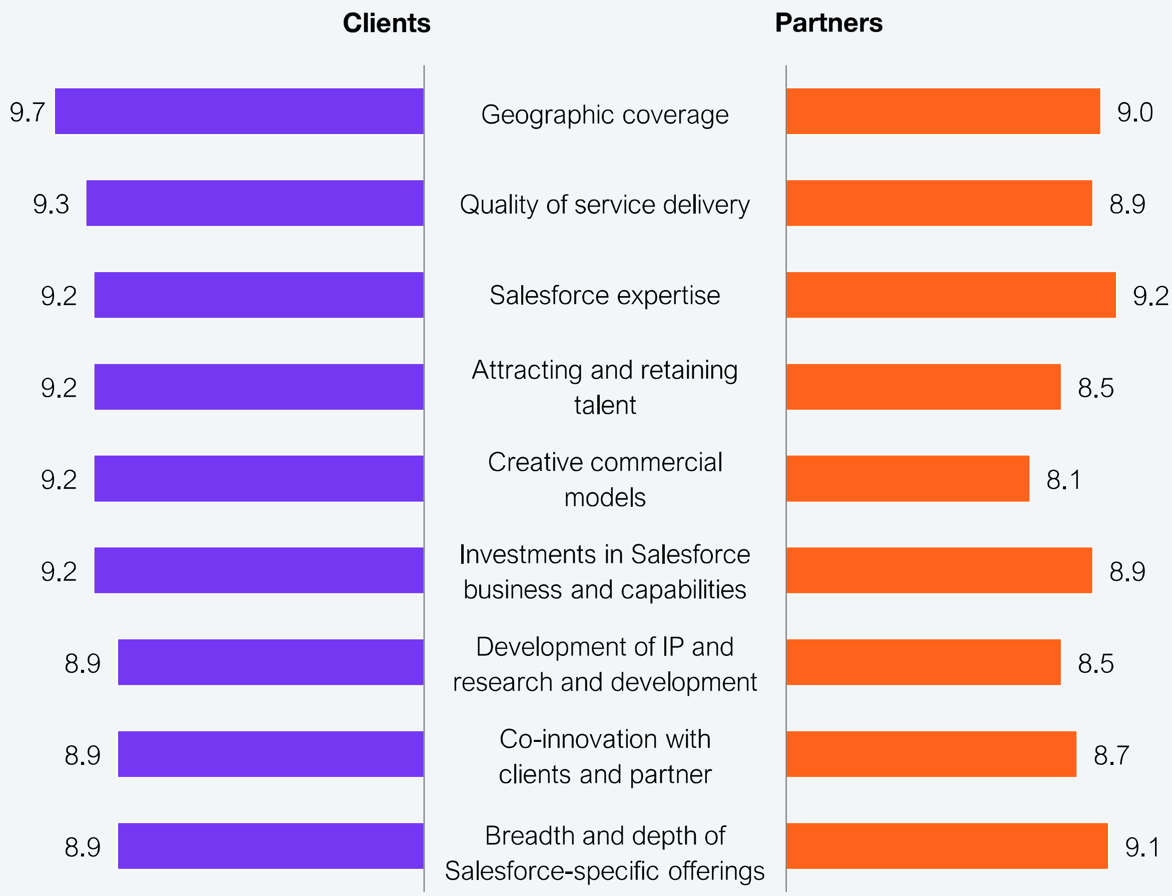
6

Sustainability and ESG initiatives are gaining momentum

HFS's research indicates that sustainability and ESG initiatives are a priority for every enterprise, including Salesforce implementation. Salesforce made sustainability one of its core values and developed its own Sustainability Cloud for enterprises to track their carbon footprint and manage ESG data. Service providers are working to help enterprises improve their environmental impact by optimizing their tools and accelerators to be more eco-friendly and identifying opportunities to streamline operations for environmental efficiency.

Enterprises are largely satisfied with their providers, but partners struggle with commercial models, talent, and IP challenges

Q: Please rate the provider's expertise in executing the following Salesforce activities.
scale of 1 to 10, where 1 is poor and 10 is excellent; (Average rating)



Sample: HFS Horizons survey, Salesforce service providers, 26 client and 20 partner references
Source: HFS Research, 2025

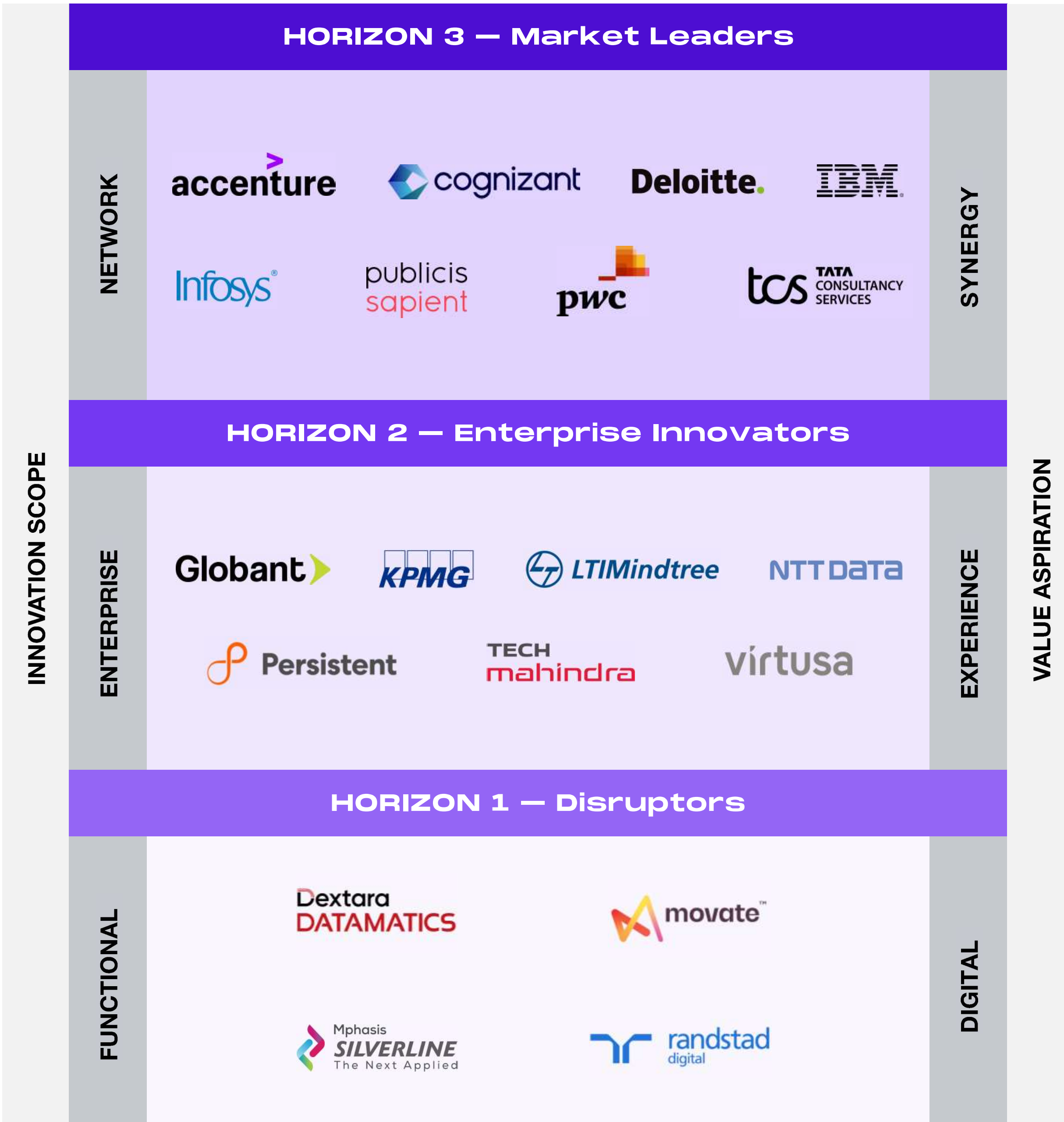
3

Horizons results: Salesforce Service Providers, 2025

HFS Horizons: Summary of providers assessed in this report

Providers (alphabetical order)	**HFS point of view**
Accenture	One of the largest Salesforce service providers with strong investments in innovation
Cognizant	Bringing data and AI to enterprises through Salesforce
Dextara Datamatics	Inorganically growing its Salesforce practice for healthcare and manufacturing clients
Deloitte	Helping enterprises pivot from transactions to relationships
Globant	Strong LATAM presence with a focus on cost optimization and AI-enablement
IBM	Market-leading AI capabilities combined with a strong Salesforce relationship
Infosys	Deep Salesforce capabilities with AI and human-centric design at the core
KPMG	Bringing its partnership ecosystem and agile delivery to Salesforce services
LTIMindtree	Merger synergies unlocking significant growth potential for new and existing Salesforce clients
Movate	Pulling on its CX background and gig economy approach to deliver Salesforce services
Mphasis	Strong growth potential with a particular focus on BFSI
NTT DATA	Leveraging its global network to become a partner, not provider, for Salesforce services
Persistent	Bringing digital engineering to the Salesforce ecosystem
Publicis Sapient	Unlocking new doors with marketing relationships and strong Data Cloud expertise
PWC	Strong growth potential with a particular focus on BFSI
Randstad Digital	A flexible Salesforce service provider with a strong emphasis on talent and rapid deployments
TCS	Deep industry expertise with sheer size and scale making it an execution powerhouse
Tech Mahindra	A vertical-driven approach to delivering Salesforce services
Virtusa	Engineering-led Salesforce services with co-innovation at the core

HFS Horizons for Salesforce service providers (1 of 2)



Note: All service providers within a Horizon are listed alphabetically.
Source: HFS Research, 2025

HFS Horizons for Salesforce service providers (2 of 2)

Horizon 3 service providers demonstrate

- Horizon 2+ the ability to drive an **ecosystem synergy** via collaboration to create completely **new sources of value.**
- Compelling thought leadership that helps clients articulate their North Star.
- Leveraging Salesforce's full range of capabilities to build a 360-degree view of customers to truly reimagine the customer experience.
- Enabling continuous innovation to help enterprises stay at the forefront of technology and transformation.
- Drive co-creation with clients as ecosystem partners.
- Referenceable and satisfied clients driving new business models with the partnership.

Horizon 2 service providers demonstrate

- Horizon 1+ the ability to drive **real business, experience-led outcomes and stakeholder experiences** while achieving **enterprise-wide transformations.**
- Clear articulation of the transformation outcomes enabled by Salesforce.
- Global capabilities with strong consulting and domain expertise across the complete Salesforce portfolio.
- Capabilities to deliver end-to-end transformation with ongoing multi-year managed services.
- Proven and leading-edge proprietary assets, including industry-led solutions.
- Referenceable and satisfied clients for the ability to blend technology and business objectives.

Horizon 1 service providers demonstrate

- The ability to drive **functional optimization** outcomes with selective Salesforce capabilities.
- Strong implementation and managed services partners.
- Offshore-focused with strong technical skills.
- Robust fundamentals of innovation and transformation enabled by Salesforce.
- Referenceable and satisfied clients for the ability to execute technology transformation.

4

Publicis Sapient profile: Salesforce Service Providers, 2025

Publicis Sapient: Unlocking new doors with marketing relationships and strong Data Cloud expertise

HORIZON 3 — Market Leader
publicis sapient
HORIZON 2 — Enterprise Innovator
HORIZON 1 — Disruptor

Strengths
• **Value proposition:** Publicis Sapient aims to be a different type of Salesforce partner thanks to its consumer-first mindset. It delivers strategy, design, and transformation with a marketing focus. • **Key differentiators:** Publicis Sapient pulls on its strong relationships with marketing leaders and expertise in direct-to-consumer markets to bring unique perspectives and unlock new doors by targeting non-traditional buyers for Salesforce services, thereby generating new growth potential. • **Technology innovation:** Publicis Sapient's capabilities have grown from being an early adopter of Data Cloud to being an early driver of Agentforce. It has already deployed agents in two tier-1 retailers and developed 40 cross-industry use cases, proving its early credibility with the tech. • **Outcomes:** Publicis Sapient created a new e-commerce business, platform, and delivery model for a leading UK supermarket to enable digital growth while maintaining existing service levels. • **Client and partner kudos:** Clients and partners compliment Publicis Sapient's domain expertise, partnership mindset, and storytelling ability, translating business needs into value pitches.

Development opportunities
• **What we'd like to see more of:** Continued momentum with Agentforce—Publicis Sapient has made early progress with GenAI. The firm should continue to invest in the technology to establish itself as a truly innovative partner. • **What we'd like to see less of:** Publicis Sapient represents itself as a different type of partner. We recognize the benefit this can bring to enterprises, but we expect more success stories and client case studies to bring these claims to life. • **Client and partner critiques:** Clients and partners want to see a more executive presence in deals and a better use of the relationships.

Partnerships	Clients
Key partners: Salesforce, META, Google, AWS, Epsilon	**Number of clients:** Not disclosed **Key clients:** ASDA, Pandora, Wingstop, UPS, The Container Store

Global operations and resources	Flagship internal IP
Headcount: Not disclosed **Delivery and innovation locations by major geo:** 59 globally • North America: 25 offices • Europe and the Middle East: 20 offices • India: 5 offices and delivery centers • Asia: 9 offices • 15 innovation labs globally	• Conversational Experience • Total Commerce

5

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Sam Duncan is a Practice Leader at HFS, based in Cambridge, UK. He graduated from Bournemouth University with a degree in economics. His interest in macroeconomics focuses on how the evolution of technology accelerated globalization. He also studied law, accounting, and investment management.

Since joining HFS, Sam has developed his understanding of blockchain and continues exploring the latest applications of the technology across various industries. He applies his economics background to keep up with the latest banking and financial services industry trends and has a keen interest in insurance. He regularly contributes to the HFS Market Index, a quarterly report breaking down the performance and key events of the leading service providers throughout the previous quarter.

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Krupa is a Senior Analyst at HFS Research and is a part of data products. She is responsible for ITO-BPO outsourcing contracts, merger and acquisition data collection and analysis for different service lines. She also works with practice leads with a focus on business process services and digital technologies.

Krupa has over four years of experience in business research and analysis in Excellence4U Research Services and Futurecorp Consulting. She was a part of the market research team, where her responsibilities included performing secondary research for company profiling, industry analysis, and competitive analysis. At Excellence4U, she worked with the technology mapping team that learned about clients' businesses and how products are used by the target audiences, helping her clients better understand their customers' needs.

About HFS

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- **INTREPID**
- **BOLD**

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