NEAT EVALUATION FOR INFOSYS:

Salesforce Services

Market Segment: Overall

Introduction

This is a custom report for Infosys presenting the findings of the 2026 NelsonHall NEAT vendor evaluation for *Salesforce Services* in the *Overall* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of Infosys for Salesforce services, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering Salesforce services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall, and with specific capability in Agentforce Services, Sales Cloud Services, Commerce Cloud Services, Marketing Cloud Services, Service Cloud Services, and Salesforce Industries Services.

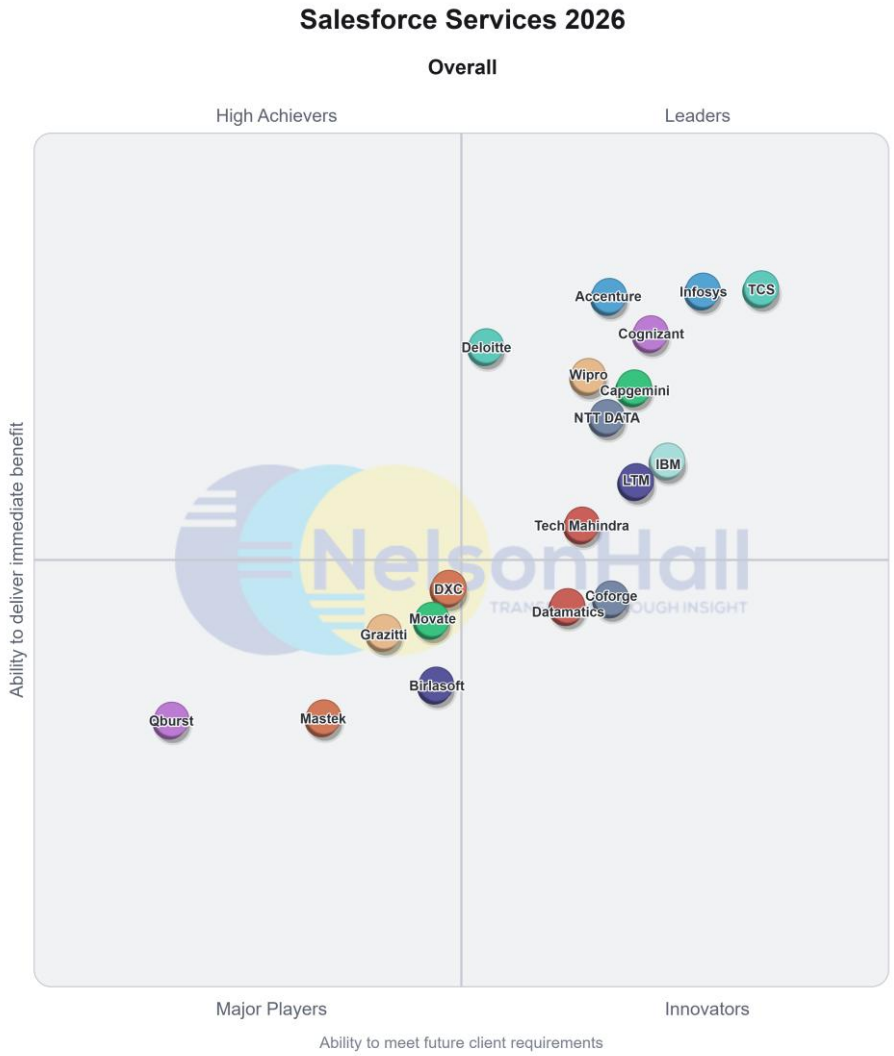
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Accenture, Birlasoft, Capgemini, Coforge, Cognizant, Datamatics, Deloitte Consulting, DXC, Grazitti Interactive, IBM, Infosys, LTM, Mastek, Movate, NTT DATA, Qburst, TCS, Tech Mahindra, and Wipro.

Further explanation of the NEAT methodology is included at the end of the report.

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NEAT Evaluation: Overall



NelsonHall has identified Infosys as a Leader in the *Overall* market segment, as shown in the NEAT chart. This market segment reflects Infosys' overall ability to meet future client requirements as well as delivering immediate benefits to its Salesforce services clients.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *Salesforce Services* NEAT tool here.

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Vendor Analysis Summary for Infosys

Overview

Infosys has been providing Salesforce services for ~20 years. It is a Salesforce Summit partner with ~24k Salesforce certifications and has representation on multiple Salesforce Advisory boards.

The Infosys Salesforce Practice (ISP) is structured around scalable delivery models, industry-specific assets, enterprise-wide AI integration, and global delivery expansion, primarily to support enterprise-scale transformation programs. ISP has grown organically, as well as through Salesforce-focused and industry-expertise-specific acquisitions, especially in the last few years.

ISP is structured around four components:

- Simplus in the U.S. and ANZ for client-facing activities, including sales, advisory services, and onsite delivery
- Fluido, initially in Finland and the Nordics, and now deploying its capabilities to Europe
- A delivery organization with its core in India
- A CoE in charge of portfolio and IP management, including industry solutions, accelerators, and methodologies, alongside training and upskilling
- A dedicated CoE for solutioning and training for each key Salesforce Cloud.

Infosys' Salesforce products include Agentforce, Agentforce Commerce, Agentforce for Field Service, Salesforce Industries, Agentforce IT and HR Service, Agentforce Marketing, Mulesoft, Agentforce Revenue Management, Agentforce Sales, and Agentforce Service.

NelsonHall estimates Infosys had ~9.2k Salesforce practitioners at the end of 2025.

Financials

NelsonHall estimates Infosys' 2025 Salesforce revenue breakdown by geography was:

- Americas: 60%
- EMEA: 26%
- Asia Pacific: 14%.

NelsonHall estimates that the top five vertical markets by revenue are:

- Manufacturing: 25%
- Telecoms & media: 16%
- BFSI: 14%
- Healthcare and life sciences: 14%
- Energy & utilities: 10%

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Other industries include High-Tech, Retail & CPG, Government, and Travel, Transport & Logistics

Strengths

- *Salesforce Industries*: Infosys demonstrates depth in industry capabilities through extensive industry reference architectures, prebuilt industry solutions like Retail 360, and process maps. Apart from implementation acceleration, this enables contextual adoption for overcoming generic patterns and compliance mandates, like with the Patient Care solution for healthcare
- *Agentforce Revenue Management*: Infosys has developed a mature Revenue Management offering covering the quote-to-cash and billing lifecycle. It has developed a set of reusable tools and accelerators supporting migration, configuration, and operational alignment of revenue workflows. These include structured transformation kits and migration workbenches for transitioning legacy CPQ environments to Agentforce Revenue Management
- *Agentforce Marketing*: Infosys has developed structured marketing solution libraries for key use cases like campaign orchestration, segmentation, and engagement workflows. These capabilities are supported by reusable marketing assets, broader Infosys marketing automation platforms like Aster, and predefined engagement workflows that can be deployed across industries.

Challenges

Infosys' Salesforce capabilities are structured primarily around large-scale transformation programs. The multi-layered delivery models, reusable industry assets such as those from Infosys Topaz and Infosys Cobalt, integration frameworks, and bundled operating constructs are better suited to complex, enterprise-wide deployments than to narrowly scoped engagements.

Strategic Direction

- *OSP Partner*: Infosys is building on its OSP partner relationship to expand engagement models that bundle licenses, services, and AI tooling into unified delivery. This enables Infosys to own and manage Salesforce technology on behalf of clients under a single contract structure, combining implementation, operations, and AI-enabled delivery. The approach is being refined with flexible payment models, outcome-linked pricing, and bundled delivery structures to reduce time-to-value and simplify governance
- *Industry Focus*: Infosys is developing reusable industry solutions and working with ecosystem and advisory partners to support sector-specific transformation programs. It has identified key vertical focus areas, including energy, utilities, life sciences, retail, public sector, and education. Across these industries, Infosys has developed preconfigured solutions such as Energy Management Solutions, Patient Care platforms, LaborForce systems, and Higher Education engagement solutions
- *Geographic Strategy*: Infosys continues to expand its Salesforce delivery footprint across global and nearshore locations, such as the Philippines and Poland, to support global rollout programs and improve scalability

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- *Sales Team*: Infosys is investing in AI-driven sales enablement capabilities aimed at improving sales productivity and opportunity management workflows. This includes pipeline inspection models, opportunity insights, and meeting preparation capabilities, innovation workshops, and predefined AI use cases to help identify high-value sales automation opportunities. These tools are intended to support seller productivity and enable more standardized sales workflows across enterprise sales organizations
- *Enterprise-Wide Technology Integration*: the Salesforce practice is increasingly aligned with broader Infosys enterprise platforms such as Topaz, Cobalt, and Aster, which are used to position horizontal capabilities across AI, cloud, and marketing transformation
- *Partnerships in Emerging Technologies*: Infosys is strengthening partnerships across technology ecosystems to support specialized capabilities within Salesforce transformation programs through co-development activities, joint go-to-market efforts, and solution development initiatives with Salesforce and ecosystem partners. These partnerships are focused on expanding reusable IP, enabling integration capabilities, and accelerating deployment across industry-specific use cases
- *Land-and-Expand Strategy*: Infosys continues to use widely adopted Salesforce clouds, particularly Sales and Service Cloud, as entry points into client environments before expanding into broader platform capabilities such as Data Cloud and Agentforce. This staged adoption model supports long-term customer relationships and enables incremental expansion into additional functional areas over time.

Outlook

Infosys is working to evolve Salesforce delivery, enable interoperability of Agentforce across enterprise AI ecosystems, and shift pricing towards outcome-linked constructs. A key direction is the expansion of reseller-style capabilities through bundled licenses, services, and AI tooling delivery. With AI interventions and data requirements becoming increasingly complex, Infosys is seeking to simplify governance and align delivery with measurable outcomes.

A second dimension is the growth of agents from Salesforce and from other platforms. Infosys is investing in interoperable agents that can operate across non-Salesforce ecosystems, hyperscalers, and platforms.

The third directional shift relates to pricing and commercial models evolving toward agent-driven and outcome-linked frameworks. While still in its early stages, both in terms of client interest and maturity, the movement towards performance-based pricing models tied to platform adoption, productivity improvements, and operational outcomes is accelerating.

These changes reflect a broader repositioning of Infosys Salesforce services from labor-based delivery to software-led, agent-enabled execution gains.

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Salesforce Services Market Summary

Overview

The Salesforce services market continues to expand alongside the evolution of the Salesforce platform, with growth increasingly driven by AI, enterprise data, and industry-specific business capabilities rather than CRM adoption alone. Salesforce remains a core platform for front-office transformation, while organizations are extending deployments across adjacent business functions and enterprise workflows.

Sales Cloud and Service Cloud continue to account for most enterprise investment and remain the foundation of multi-cloud deployments. However, the primary growth opportunities are shifting toward Agentforce, Data 360, MuleSoft, and Salesforce Industries, as organizations invest in unified enterprise data, AI-enabled automation, and industry-specific capabilities. Marketing, Commerce, and Field Service continue to expand, primarily as extensions of broader Salesforce programs rather than as standalone transformation initiatives.

Demand is increasingly centered on AI-enabled business processes rather than standalone AI deployments. Organizations are embedding Agentforce, Data 360, Einstein capabilities, and automation into existing business workflows, with unified enterprise data, integration, and governance becoming prerequisites for broader AI adoption.

As Salesforce deployments become broader and more business-oriented, the services ecosystem continues to evolve beyond implementation-led engagements. Clients increasingly require consulting around AI readiness, data and operating model transformation, governance, and business process redesign, alongside implementation, integration, managed services, and ongoing AI operations to support long-term platform adoption.

Buy-Side Dynamics

Two client segments continue to dominate the market:

- *Business Buyers*, i.e., organizations adopting Salesforce to improve CRM, process automation, customer engagement, and user productivity. These organizations continue to pursue multi-cloud deployments and are increasingly evaluating Agentforce and other AI capabilities as an extension of their existing Salesforce investments
- *IT Buyers*, i.e., organizations treating Salesforce primarily as an IT modernization initiative, focused on simplifying and rationalizing their technology estate, reducing operating costs, and improving data quality and governance to support AI-enabled automation.

Salesforce adoption remains broad-based across industries. Organizations continue to deploy Salesforce across customer-facing functions while increasingly adopting industry-specific capabilities, standardized data models, and preconfigured business processes. Salesforce Industries is becoming more central to enterprise deployments, particularly in sectors such as financial services, healthcare, manufacturing, retail, public sector, and communications, where organizations are combining industry functionality with AI-enabled capabilities and unified enterprise data.

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Market Size & Growth

Salesforce services spending is expected to rise from $23.6bn in 2025 to $25.9bn in 2026, reaching $35.1bn by 2029, representing an estimated 11% CAGR between 2025 and 2029. Growth is expected to be supported by Agentforce-related services, continued multi-cloud adoption, Salesforce Industries, and ongoing post-implementation services as organizations adopt new platform capabilities.

The U.S. remains the largest market for Salesforce services. However, international markets are becoming increasingly important growth engines, with continued investments in EMEA and APAC and expected vendor consolidation and Salesforce acquisitions creating additional services opportunities across markets such as India, Japan, Latin America, and the Middle East.

Success Factors

To address the needs of *Business Buyers*, successful vendors need to combine Salesforce implementation capabilities with AI, data, and business transformation expertise, including:

- Business consulting, business process transformation, AI readiness assessments, and operating model design
- Salesforce implementation, Agentforce deployment, Data 360 implementation, integration, and orchestration across enterprise applications
- Reusable accelerators, industry-specific templates, AI-enabled workflows, and governance capabilities to accelerate implementation and support long-term platform adoption.

To address the needs of *IT Buyers*, successful vendors need to demonstrate the value of Salesforce by helping organizations to:

- Simplify and rationalize their technology landscape through standardized implementations, API-led integration, and enterprise data governance
- Reduce operational complexity and technical debt while improving data quality, platform maintainability, and readiness for AI-enabled automation.

Outlook

The outlook for the Salesforce services market includes the following developments:

- Agentforce, Data 360, Salesforce Industries, and MuleSoft will be the primary drivers of Salesforce services growth, extending Salesforce beyond traditional CRM implementations
- Vendors will increasingly position Salesforce as the foundation for AI-enabled business processes, combining AI, unified enterprise data, integration, and business process transformation into broader enterprise engagements
- Industry-specific implementations will continue to gain momentum, with vendors expanding reusable industry assets, preconfigured business processes, and AI agents tailored to sector-specific requirements
- Delivery models will continue shifting from project-based implementations toward outcome-based managed services, with greater emphasis on AgentOps, AI operations, governance, and continuous optimization

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- Multi-cloud implementations will remain the dominant delivery model, with Sales and Service Cloud continuing to form the foundation of broader Salesforce programs while Data 360 and Agentforce become increasingly embedded across deployments
- Organizations will continue to invest in post-implementation services to optimize platform adoption, improve governance, reduce technical debt, and adopt new AI capabilities introduced through Salesforce releases
- Unified enterprise data, integration, and governance will become prerequisites for enterprise AI adoption, increasing demand for services around data modernization, AI governance, and enterprise architecture
- Vendors will continue investing in Agentforce skills, cloud-specific CoEs, industry expertise, and targeted acquisitions to expand delivery capabilities and address growing demand for AI-enabled Salesforce services.

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NEAT Methodology for Salesforce Services

NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet future client requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet future client requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- Leaders: vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet client future requirements
- High Achievers: vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet client future requirements
- Innovators: vendors that exhibit a high capability relative to their peers to meet client future requirements but have scope to enhance their ability to deliver immediate benefit
- Major Players: other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.

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Exhibit 1

'Ability to deliver immediate benefit': Assessment criteria

Assessment Category	Assessment Criteria
Offerings	Advisory and consulting services Implementation services Managed services Agentforce (Includes Einstein and Data Cloud capabilities) Agentforce Sales Agentforce Marketing Agentforce Service Agentforce Field Service Agentforce Revenue Management Agentforce Commerce Salesforce Industries Mulesoft
Delivery Capability	U.S. U.K. CE MEA Offshore and nearshore Japan RoAPAC LA Total
Client Presence	N. America U.K. CEMEA APAC LATAM Globally
Benefits Achieved	Level of cost savings achieved Timely implementation Achievement of program business objectives Improved time to market Improved customer experience

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Exhibit 2

'Ability to meet client future requirements': Assessment criteria

Assessment Category	Assessment Criteria
Service Innovation Culture	Mechanisms in place to deliver client innovation
	Extent to which client perceives that innovation has been delivered
	Suitability of vendor to meet future needs of clients
	Strength of partnership
Level of Investments	Advisory services
	Implementation services
	Testing
	Post-implementation and managed services
	Agentforce (Includes Einstein and Data Cloud capabilities)
	Sales Cloud
	Marketing Cloud
	Service Cloud
	Field Service Cloud
	Revenue Cloud
	Commerce Cloud
	Salesforce Industries
	Mulesoft
Other	Market momentum
	Financial security

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.

Sales Inquiries

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:

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