

IDC MarketScape

IDC MarketScape: Worldwide Salesforce Implementation Services 2025-2026 Vendor Assessment

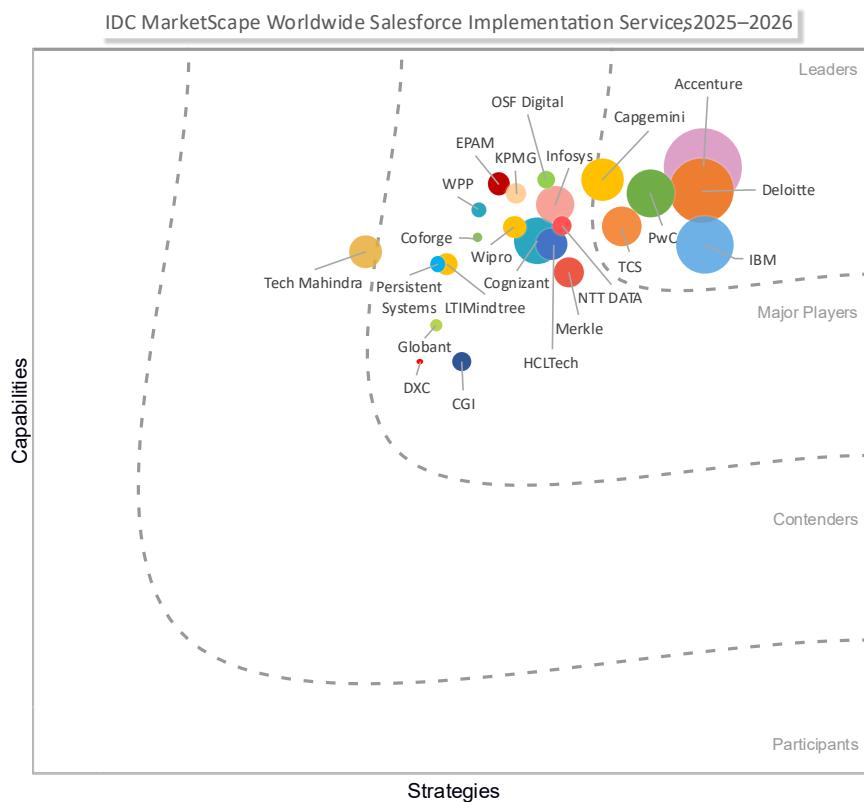
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THIS EXCERPT FEATURES PWC AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Salesforce Implementation Services Vendor Assessment



Source: IDC, 2025

See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Salesforce Implementation Services 2025-2026 Vendor Assessment (Doc # US51272324).

IDC OPINION

This IDC study represents a vendor assessment of the 2025-2026 Salesforce implementation services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate the vendor's ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide Salesforce implementation services market. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing Salesforce implementation services in both the short term and the long term. A component of this evaluation is the inclusion of the perception of Salesforce implementation services clients of both the key characteristics and the capabilities of these providers. Some of IDC's findings are discussed in this section.

The Salesforce platform has matured over the past 25+ years. Many of the vendors in this assessment have maintained practices dedicated to providing Salesforce implementation services for upward of 20 years. These vendors too have matured over the decades. Nearly all vendors included in this assessment provide an end-to-end portfolio of services across the life cycle, ranging from business consulting, custom application development, application and infrastructure management, and support and training services. As part of their strategy, vendors have advanced their capabilities across Salesforce products and within industries and functions. They have developed varying levels of depth and maturity across each of these aspects — some invest in end-to-end expertise across domains and products, while some are more specialized.

Most vendors have seen strong growth in their Salesforce implementation services businesses since 2021, utilizing a combination of approaches. Service providers (SPs) assessed in this study have maintained high CSATs and ensured quality delivery to retain customers. This is in addition to utilizing effective marketing strategies to grow their customer base. Inorganic strategies have been noted as another effective means for growth, leveraged by upward of 70% of the vendors in this study. While some vendors have preferred an organic strategy for growth, vendors that acquired Salesforce capabilities benefited from an expansion in client base, talent, and IP. Vendors have made sizable investments in innovation to develop IP and further their

Salesforce business. These figures generally range anywhere of 2-15% of annual revenue, depending on the size and maturity of the Salesforce practice. Vendors engage extensively with Salesforce to coinvest and codevelop solutions. Third-party vendors and clients also collaborate with vendors to develop IP, often investing alongside vendors. Talent development is another area of investment that plays a crucial role in the growth of Salesforce implementation services. Some vendors maintain large global teams capable of rapidly scaling projects. Few have smaller, specialized teams that focus on targeted problem statements and/or scope. Regardless of size, upskilling the workforce and growing certifications is a priority for service providers. IDC notes an average of 3.67 certifications per employee among vendors in this study. Some vendors boast measures as high as 4.7 certifications per professional, on average.

The impact of AI has been noted across paradigms in the context of Salesforce. Service providers are increasingly engaged in Salesforce modernization initiatives to help buyers advance AI maturity. IDC's February 2025 *Future Enterprise Resilience and Spending Survey, Wave 1*, indicates that 22.2% of organizations believe that their primary IT consulting partner will play the greatest role in helping them develop and implement their AI strategy in the next year. The same study indicated that 21.1% expressed that their primary customer experience platform vendor, such as Salesforce, played the greatest role. Another reason for end users to work with service providers relates to the vendors' internal use of AI and automation of traditional service delivery for results such as reduced complexity and faster solution delivery. IDC's interactions with vendors indicate that they have incorporated good measures of automation, to the tune of 25% on average. This is further supported by AI-enabled service delivery, which vendors report to be about 31% on average. While these figures vary by vendor and engagement, AI is expected to further become a critical aspect of Salesforce engagements going forward.

Salesforce has many capabilities for AI, including Agentforce, Einstein, and Tableau AI, that are becoming central to the platform's strategic direction. Agentforce is of particular interest to buyers, owing to its ability to drive automation, create digital autonomous agents, and integrate seamlessly with the Salesforce ecosystem. IDC's June 2025 *Global AI Technology Trends Survey* indicates that 21.6% of buyers are currently using or plan to use Agentforce to build and orchestrate agents. Although the platform has the potential to drive outcomes such as productivity, operational cost savings, and improved customer engagement, effective use of its capabilities requires a robust foundation and knowledge of best practices. Some key considerations for success include a clear view of ROI and KPIs to track alignment to goals, data readiness, integrations needed with legacy systems, agent configuration, change management, and performance tracking.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The scope of this IDC MarketScape includes providers that offer Salesforce implementation services. IDC considered more than 25 vendors of such offerings across the globe to be included in this IDC MarketScape. IDC collected and analyzed data on 23 service providers that met our inclusion criteria.

For inclusion in this IDC MarketScape, the vendor had to meet two criteria:

- **Head count.** Have more than 1,000 certified experts as per Salesforce AppExchange.
- **Revenue.** Have more than \$200 million in IT consulting and systems integration services as per IDC services tracker.

ADVICE FOR TECHNOLOGY BUYERS

Based on this study, IDC recommends that buyers consider the following recommendations before starting new Salesforce implementations:

- **Have a clear plan.** Whether exploring a new implementation or embarking on modernizing legacy systems, ensure that your business objectives from the implementation are well articulated, with well-aligned KPIs to track progress. Ensure that the right stakeholders, be they executives, IT, end users, or partners, are engaged early on to ensure transparency and buy-in.
- **Be wise while scoping out your implementation.** Allocate capital judiciously to Salesforce products and modules that create value for your business reality. This may mean creating road maps for different business units, prioritizing near-, medium-, and long-term impact. This ensures that implementations can scale as your business expands.
- **Keep a careful eye on customizations.** Utilize standard features extensively, working with built-in capabilities and minimizing custom functionality. This ensures that maintenance remains simple and upgrades straightforward. In some cases, customizations for business processes may prove to be cost effective. If opted for, ensure that any customizations are well documented.
- **Prepare an AI strategy leading with trust and data.** Data has become a pivotal piece of Salesforce's product strategy. Salesforce Data Cloud and Einstein platform are at the core of Salesforce's efforts to unify customer data and anchor its AI strategy. And Salesforce is acquiring Informatica for \$8 billion to enhance its data foundation and offerings. For many organizations, customer engagement can be a top use case for AI integration before moving on to more complex use cases. To capitalize on the opportunities from AI, organizations

must focus on data and IT architecture readiness. Evaluate the vendor's capabilities to build data architecture and responsible ethical frameworks to support AI use cases. In addition, look past the vendor's marketing claims to understand its approach to unearthing business value from AI, especially its approach to solving customer data challenges with Salesforce or proprietary offerings or both while upholding a high level of ethics and governance.

- **Give adequate attention to change management.** To maximize the value from Salesforce investments, enterprises need to provide ample weightage to people and process changes along with the technology integration changes required for AI-enabled transformation. Invest in a holistic change management strategy that captures the requirements of end users, tracks outcomes from the implemented solution, and creates a feedback loop to foster continuous innovation.
- **Think beyond CRM implementation.** Salesforce has transformed its value proposition beyond the realms of a CX transformation tool to an engagement platform, transforming employee experience and customer journeys. And Salesforce is expanding into additional functional areas like IT service management, supply chain, and revenue management. Leverage the expertise of Salesforce partners that can bring together tools, best practices, methodologies, and SI experience to elevate the value proposition of Salesforce solutions beyond the CX use cases. Partner with implementation SPs that can drive unity between the front and back office enabling stronger integration with business systems and create an integrated data strategy, with analytics, AI, and automation.
- **Consider industry expertise.** As Salesforce continues to align its portfolio of solutions to address key industry pain points, it is important to consider the industry expertise of the implementation partner to contextualize solutions and provide key industry insights at various stages of implementation that can provide superior time to value and up-front cost savings.
- **Look to integrate with other applications and systems.** Most enterprise organizations will be integrating Salesforce clouds with other applications and systems. Salesforce has realized that many organizations will have hybrid models and has built integrations with other solutions as part of its MuleSoft portfolio. MuleSoft is more of a technology discussion than a business function discussion like CRM. A service provider's MuleSoft capabilities is an important consideration for some buyers, especially those that want to leverage this part of the Salesforce offering portfolio.
- **Recognize that scale is important, but providers of all sizes can offer value.** The number of service providers that can help implement Salesforce solution is vast. This IDC MarketScape assesses 23 providers, but there are many more providers that may be suitable to an organization's specific needs, such as the industry and/or regions they operate in. IDC advises prospective customers to

prioritize their requirements and consider several (or more) of the providers of varying sizes able to meet their requirements in terms of service delivery, ability to grow with you, relationship management, and cost constraints. Find the right provider that fits your requirements and culture. Refer to the Vendors to Watch section for a list of additional vendors to consider when procuring Salesforce professional services.

- **Evaluate vendors.** Use this IDC MarketScape in contract negotiations and as a tool to not only shortlist vendors for Salesforce implementation services bids but also evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise (technical, industry based, or otherwise).

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

PwC

According to IDC analysis and buyer perception, PwC is positioned in the Leaders category in this 2025-2026 IDC MarketScape for worldwide Salesforce implementation services.

PwC is a global professional services firm providing audit, tax, and advisory solutions, with offerings in digital transformation and technology-enabled consulting, including Salesforce implementation and managed services. Headquartered in London, PwC operates through a global network spanning more than 150 countries. PwC's vision is to build trust in society and solve important problems, empowering clients with innovative, outcome-driven digital strategies and operational transformation at scale. The Salesforce business at PwC is managed through the Commercial and Service Excellence Platform, one of eight platforms within its Advisory segment, integrating front-office strategy, design, implementation, and operational (managed services) capabilities.

PwC's Salesforce practice provides full life-cycle services — from business consulting and digital marketing to custom application development, integration, managed services, and ongoing IT training and support — serving more than 1,200 clients globally in the past three years. With over 5,550 dedicated professionals delivering Salesforce solutions worldwide, the firm holds over 22,000 Salesforce certifications, averaging four certifications each. Areas of Salesforce expertise span Agentforce, Data

Cloud, Marketing Cloud, Revenue Cloud Advanced, Experience Cloud, Integration (including MuleSoft), Commerce, Analytics, industries, and platform delivery. In recent years, PwC has strengthened its Salesforce footprint through acquisitions such as Be-Intelligent in New Zealand and Venerate in India, expanding its delivery capacity, regional reach, and managed services offering, in addition to establishing Salesforce reseller status in APAC. Globally, 20% of dedicated Salesforce professionals are based in the Americas, 30% in EMEA, and 50% in Asia/Pacific and Japan, with key delivery centers in India, Poland, Mexico, and Manila to support global scaling and 24 x 7 project continuity.

PwC's Salesforce services delivery is supported by proprietary tools such as Team Builder, Consumer Goods Toolbox, ProjectForce, CPQ QuickStart, and numerous industry-specific accelerators. Delivery is standardized using agile, SAFe-based frameworks and is further enhanced by investments in automation, reusable assets, and an R&D and continuous feedback culture to meet sector-specific needs with scalable, repeatable best practices. The vendor holds 16 seats across Salesforce's Partner Advisory Boards, enabling direct input into product road maps and innovation priorities.

PwC has prioritized AI and automation within its Salesforce offerings, positioning itself as a launch partner for Salesforce Agentforce and a key collaborator in bringing agentic architectures to market. The firm embeds AI, including Salesforce Einstein and proprietary capabilities like Agent OS, to drive intelligent automation, workflow orchestration, and measurable client value across sales, service, marketing, and analytics. PwC's AI vision focuses on responsible, enterprise-ready AI, with dedicated investments in upskilling (over 1,370 professionals AI certified and 360,000+ hours invested in GenAI training), an AI-native delivery methodology, and the deployment of OpenAI-powered copilots and GenAI Factory toolsets to realize efficiency and quality gains throughout the Salesforce delivery life cycle.

PwC's value proposition in the Salesforce implementation market is its ability to deliver sustained business outcomes, not only through technical excellence but by aligning holistic, outcome-based transformation with the latest in AI innovation and managed outcomes models. The firm differentiates itself by leveraging deep domain and cross-sector expertise; embedding AI and automation into delivery aspects; its pool of certified Salesforce talent, proprietary accelerators, reusable frameworks, and industry clouds; and its global, multidisciplinary model with local client engagement, supported by a strong ecosystem of alliances and partner platforms (e.g., AWS, Google, Workday, MuleSoft, Adobe). PwC utilizes its focus on continuous innovation, responsible AI, and ability to deliver value beyond go live to position itself as a trusted partner for complex, enterprise-scale Salesforce transformations worldwide.

Strengths

PwC brings a complete, end-to-end service portfolio strategy that addresses the current needs of Salesforce users, including Marketing Cloud, Revenue Cloud, and Experience Cloud as well as the future business priorities that Agentforce, Data Cloud, and MuleSoft address, which are core to PwC's Salesforce offering road map. PwC's Salesforce practice's employee strategy encompasses a talent strategy to hire, develop, and retain talent; a clear strategy to upskill Salesforce resources; and continued focus on enhancing its Salesforce certifications. PwC's Salesforce practice also invests significantly in building demand for its services via marketing campaigns that align to Salesforce's strategic direction.

Against IDC's capabilities criteria, PwC's Salesforce practice has a dedicated team that clients regard highly in terms of managing customer engagements and partnering with the Salesforce ecosystem to enhance customer value. Clients that IDC spoke with highlighted the benefits they received from the company's life-cycle service portfolio around Salesforce solutions. Client feedback indicates PwC executes effectively in service delivery, resolving problems as they arise, optimizing global delivery for accelerated value, and driving customer adoption through change management. PwC offers a variety of pricing options to clients. Feedback from client discussions and published Salesforce CSAT statistics indicate a high level of customer satisfaction.

Challenges

Against IDC's strategy criteria, PwC was impacted by its customer retention process that resulted in relatively fewer repeat clients from 2022 to 2024. PwC's Salesforce practice works well together though the global network structure could benefit investments in areas like expanding the mix of go-to-market alliances.

From a capabilities perspective, although PwC has high counts of certifications per employee (4.6 on average), its Salesforce practice has a significantly sized resource base of 5,550 that is growing at the average rate in this study. However, PwC's delivery strategy emphasizes automation and de-emphasizes relying on global delivery, which mitigates the need for a huge Salesforce resource pool.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

The Salesforce implementation services market covers the design, build, and integrate phases of the design-build-run services life cycle. The design phase includes both IT professional services and business consulting.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Digital Business Strategy Consulting Services 2025 Vendor Assessment* (IDC #US52036025, August 2025)
- *What Information Sources Do Organizations Use for Business Cases for Professional Service Engagements?* (IDC #US53288325, April 2025)
- *IDC MarketScape: Asia/Pacific Salesforce Implementation Services 2024–2025 Vendor Assessment* (IDC #AP51540024, November 2024)
- *IDC MarketScape: Worldwide Salesforce Implementation Services 2021 Vendor Assessment* (IDC #US47073921, November 2021)

Synopsis

This IDC study represents a vendor assessment of the worldwide Salesforce implementation services market through the IDC MarketScape model. This IDC study covers a variety of vendors, including global systems integrators and boutique firms. The research is a quantitative and qualitative assessment of many characteristics that buyers consider when selecting a Salesforce implementation services provider. This evaluation is based on a comprehensive set of parameters important to meeting the customer's current and future needs for Salesforce projects. This IDC MarketScape covers 28 vendors participating in the worldwide Salesforce services market. Of the vendors, 23 were assessed via the complete IDC MarketScape methodology, while 5 were partially assessed.

"The Salesforce platform continues to evolve, adding innovative capabilities such as industry clouds and Agentforce solutions. Organizations are exploring new implementations and considering system upgrades to make the most of these technologies," says Jason Bremner, research vice president, IT Consulting and Systems Integration Services at IDC. "With Salesforce, organizations seek to improve operational efficiency and profitability by actively tracking a project's ability to meet objectives and timelines across engagements."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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