

NEAT EVALUATION FOR NTT DATA:

Salesforce Services

Market Segment: Overall

Introduction

This is a custom report for NTT DATA 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 NTT DATA for Salesforce services, and the latest market analysis summary.

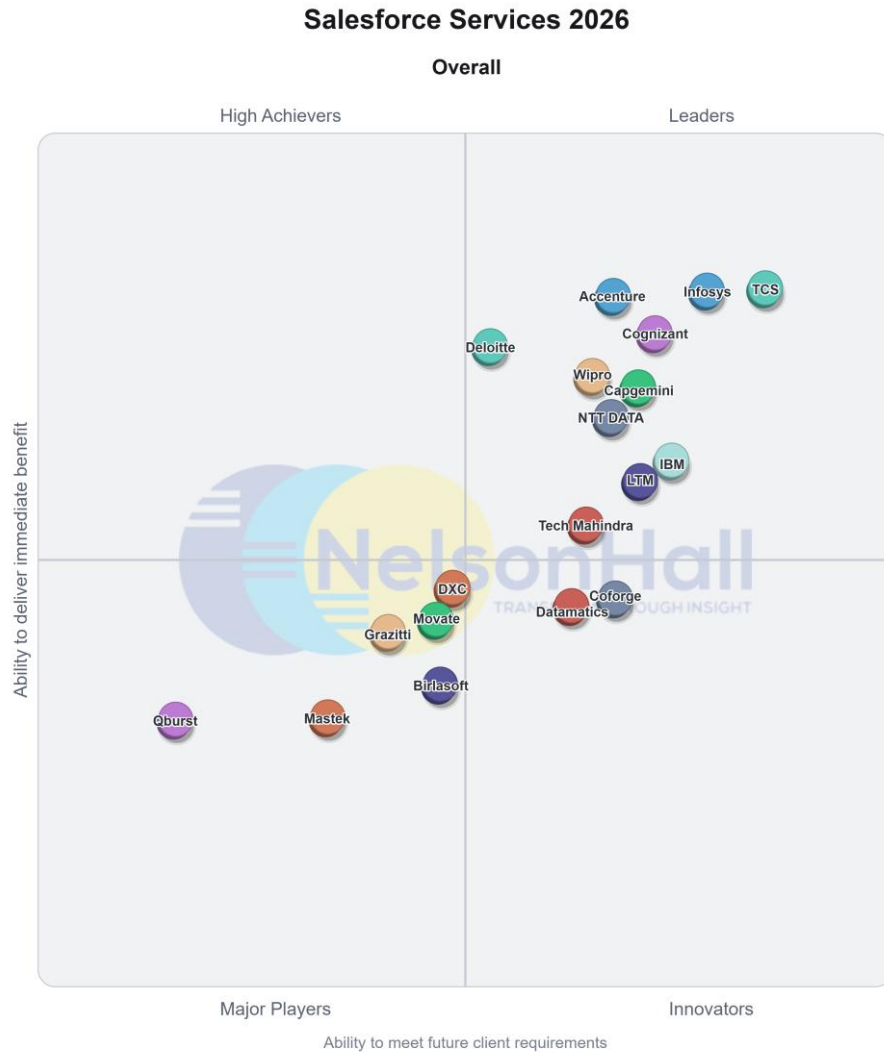
This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering Salesforce services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors 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.

NEAT Evaluation: Overall



NelsonHall has identified NTT DATA as a Leader in the *Overall* market segment, as shown in the NEAT chart. This market segment reflects NTT DATA's 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](#).



Vendor Analysis Summary for NTT DATA

Overview

NTT DATA has been a Salesforce partner since 2001. It has expanded its Salesforce business through a combination of organic growth and acquisitions, building capabilities across core CRM, Industry Clouds, MuleSoft, and other key products. The most recent acquisition is EXAH, a Salesforce provider focused on the Middle East and Africa. NelsonHall estimates that NTT DATA had ~8.4k Salesforce practitioners, including MuleSoft resources at the end of 2025.

NTT DATA's Salesforce practice operates through regionally aligned organizations supported by global CoEs and industry-specific expertise. The practice focuses on local client proximity and has capabilities across industries with a focus on financial services, telecommunications, utilities, manufacturing, healthcare, and public-sector engagements.

Recent investments have focused on strengthening Agentforce, Data 360, MuleSoft, and industry-specific AI solutions, while past acquisitions such as Apisero and strategic alliances like TerraSky have expanded the firm's MuleSoft capabilities.

NTT DATA has organized its Salesforce portfolio around the view that Salesforce has evolved from a CRM platform into a broader enterprise transformation platform spanning customer operations, data, integration, AI, and industry-specific processes. It provides business consulting, process optimization, implementation, data strategy, integration, application management, and business process services for Salesforce.

Financials

NelsonHall estimates that the proportions of NTT DATA's 2025 Salesforce services revenue by geography were: Americas 47.5%, EMEA 27%, Asia Pacific 25.5%.

Strengths

- *MuleSoft*: MuleSoft is a core component of NTT DATA's Salesforce business, supported by a large resource pool and strengthened through M&A. The company's capabilities span API strategy, integration architecture, legacy modernization, and enterprise-wide connectivity initiatives. These capabilities are reinforced by accelerators such as Agentforce Thrive, TIBCO-to-MuleSoft migration services, and Agent Fabric assessments, enabling clients to connect Salesforce, ERP, data, and third-party platforms while supporting broader modernization programs
- *Agentforce Marketing*: NTT DATA has developed a broad Agentforce Marketing capability focused on customer data unification, omnichannel engagement, and AI-enabled personalization. The offering is further differentiated through proprietary neuroAI capabilities that support the evaluation and optimization of creative assets and marketing effectiveness
- *Agentforce Service*: NTT DATA focuses on improving agent productivity, enabling self-service, and deploying AI-assisted service operations through Agentforce. These capabilities are supported by reusable assets such as the AI Service Assistant Accelerator and Contact Center Integration Accelerator, as well as established partnerships with platforms including Amazon Connect and Genesys Cloud, enabling end-to-end service and contact center modernization programs.



Challenges

NTT DATA delivers Salesforce services as part of wider business and technology transformation programs that incorporate MuleSoft, SAP, contact center technologies, infrastructure, and managed services. This enterprise-scale positioning may be less compelling for organizations seeking smaller engagements and flexibility.

Strategic Direction

- *Data-centric customer engagement*: the company is positioning Data 360 as a foundation across multiple Salesforce offerings. Its strategy focuses on creating unified customer and operational data environments that support personalization, service optimization, revenue visibility, and data-driven decision-making
- *Integration-led transformation*: MuleSoft is a central pillar of NTT DATA's Salesforce strategy. The company emphasizes connecting Salesforce environments with ERP, CRM, contact center, and third-party platforms, enabling end-to-end business processes rather than isolated cloud deployments
- *Industry-focused solutions*: NTT DATA is investing in Salesforce Industries capabilities across communications, financial services, manufacturing, utilities, energy, automotive, and life sciences. The strategy combines industry-specific accelerators, domain expertise, and consulting services to support sector-focused transformation programs
- *Client proximity through operational support*: NTT DATA emphasizes ongoing operational support and long-term client engagement rather than focusing solely on implementation projects
- *Multi-platform ecosystem strategy*: rather than positioning Salesforce as a standalone platform, NTT DATA highlights its ability to work across SAP, MuleSoft, contact center platforms, payment solutions, and other enterprise technologies. This reflects a strategy focused on integrating Salesforce into broader enterprise technology landscapes.

Outlook

NTT DATA's Salesforce strategy will remain centered on Salesforce's platform evolution, particularly Data Cloud, Agentforce, MuleSoft, and Industry Clouds. As clients move beyond traditional CRM modernization toward broader data, AI, and process transformation initiatives, the company is investing in advisory, pilot, and deployment services focused on Agentforce and related AI-led use cases.

NelsonHall expects NTT DATA to place greater emphasis on industry-specific transformation programs, building on its established presence in sectors such as financial services, insurance, telecommunications, manufacturing, and utilities.

The Outsourcing Service Provider (OSP) model is also likely to become a more prominent part of the Salesforce practice as NTT DATA bundles subscription management, application services, and operational support under a single engagement model.

Geographic expansion remains a focus. Recent investments such as EXAH in Africa and the Middle East, together with earlier acquisitions that strengthened Salesforce and MuleSoft capabilities, suggest that NTT DATA may continue to use acquisitions selectively to expand both regional coverage and specialist capabilities within the Salesforce ecosystem.



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.

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



- 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.



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.



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
Client Presence	Total
	N. America
	U.K.
	CEMEA
	APAC
	LATAM
Benefits Achieved	Globally
	Level of cost savings achieved
	Timely implementation
	Achievement of program business objectives
	Improved time to market
	Improved customer experience



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.



reimagine.nelson-hall.com

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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