

TOTAL ECONOMIC IMPACT

The Total Economic Impact™ Of Salesforce Professional Services

A FORRESTER TOTAL ECONOMIC IMPACT STUDY COMMISSIONED BY SALESFORCE, FEBRUARY 2026

COST SAVINGS AND BUSINESS BENEFITS ENABLED BY SALESFORCE PROFESSIONAL SERVICES

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Executive Summary

CRM is a strategic technology that underpins customer experience and employee engagement, and the growth of AI continues to supercharge its value. To fully realize CRM's potential, organizations must prioritize platform agility and minimize technical debt, enabling them to respond to business pressures faster and consume new innovation. Salesforce Professional Services helps organizations get the most out of their Salesforce investments, accelerating time to value, reimagining business models and processes, and creating a flexible foundation for innovation and transformational change.¹

Salesforce Professional Services is a consultancy service offered by Salesforce to help organizations get started, build, optimize, and transform with Salesforce more effectively. Engagements include roadmap development, solution configuration and build, and ongoing performance optimization. The work focuses on aligning Salesforce to business requirements, accelerating time to value, and establishing the technical and operational foundation needed to scale. Salesforce Professional Services works directly with customer teams and, when applicable, in coordination with consulting partners to support adoption and ongoing use of the platform.

Salesforce commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) enterprises may realize by deploying Salesforce Professional Services.² The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of Salesforce Professional Services on their organizations.

272%

Return on investment (ROI)

\$6.0M

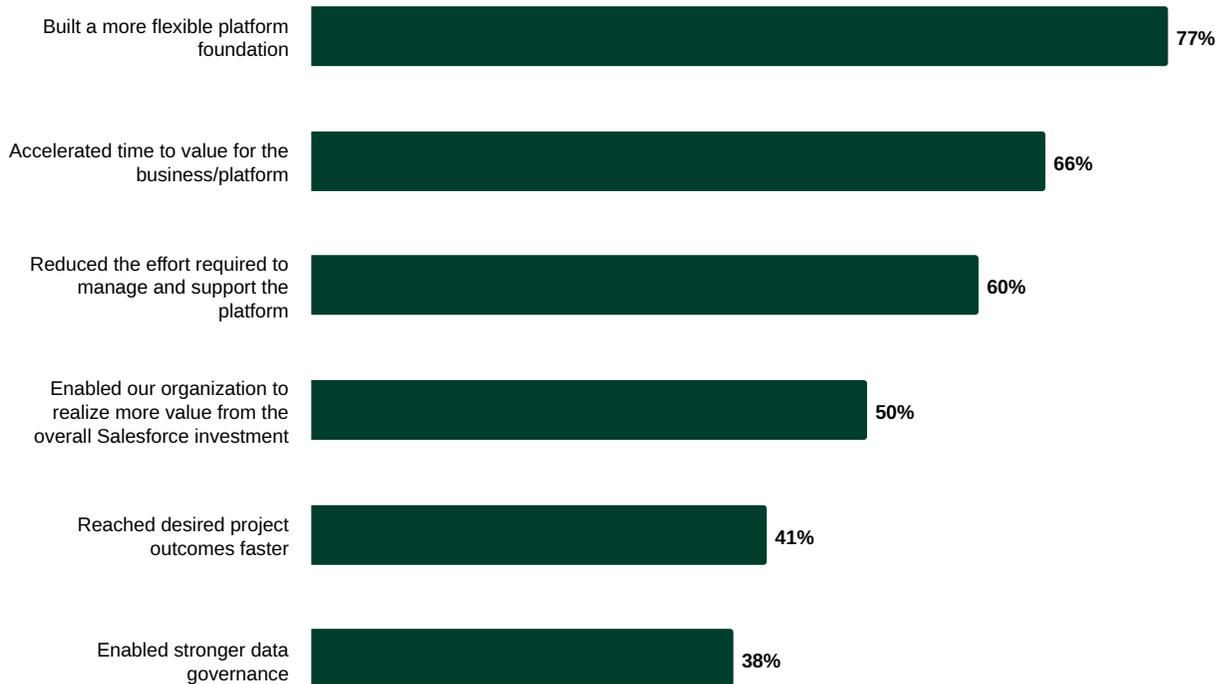
Net present value (NPV)

To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed five decision-makers and surveyed 216 respondents with experience using Salesforce Professional Services. For the purposes of this study, Forrester aggregated the experiences of the interviewees and survey respondents and combined the results into a single composite organization, which is a multibillion-dollar company with 7,500 Salesforce users.

Prior to engaging with Salesforce Professional Services, the interviewees' and survey respondents' organizations were either new to the Salesforce platform or had one or more existing Salesforce deployments that were delivering suboptimal value.

As a result of working with Salesforce Professional Services, these organizations reached project outcomes faster, accelerated time to business value, created flexible platform foundations, and were better prepared to self-sufficiently manage and innovate on their platforms. These benefits enabled organizations to realize value from their Salesforce investments that may not have been achievable otherwise.

Which of the following benefits has your organization realized as a result of its investment in Salesforce Professional Services?



Base: 216 IT and business decision-makers with responsibility for CRM

Source: A commissioned study conducted by Forrester Consulting on behalf of Salesforce, September 2025

Key Findings

Quantified benefits. Three-year, risk-adjusted present value (PV) quantified benefits for the composite organization include:

- **Accelerated implementation speed by 40%.** The engagement with Salesforce Professional Services reduces the composite's project timeline by eight months. This acceleration enables the organization to avoid internal labor and consulting costs that would have been incurred with a longer deployment. With the accelerated timeline, the composite avoids internal labor and consulting costs, resulting in savings of \$1.6 million over three years.
- **Reduced time to minimum viable product (MVP) by three months.** The accelerated project timeline enables the composite organization to realize business value from the Salesforce platform more quickly. The composite reduces its entire project timeline by eight months and begins realizing value from an MVP three months sooner than it would have without the assistance of Salesforce Professional Services. This acceleration allows the organization to achieve platform benefits sooner, including a 360-degree view of its customers and improvements in customer experience, revenue growth, and operational efficiency. During a three-year period, the timeline acceleration adds \$2.8 million in business value.
- **Reduced project risk by 50%.** The involvement of Salesforce Professional Services helps ensure that the implementation successfully addresses business objectives by delivering expected functionality, driving user adoption, and enabling system performance. This reduces the risk that the platform fails to deliver its intended value due to ineffective capabilities, underutilization, or technical issues. For the composite organization, the value of this risk reduction is estimated at \$917,000 over three years.
- **Accelerated adoption of innovation from new Salesforce releases by 26%.** With guidance from Salesforce Professional Services, the composite organization builds a more flexible platform foundation by prioritizing out-of-the-box features and

configuration over customization. This approach simplifies the architecture and ensures greater compatibility with future Salesforce releases. Collaboration with Salesforce Professional Services also facilitates knowledge transfer around best practices and agile methodology to internal teams. The combination of a simplified platform and upskilled teams enables the organization to adopt new innovations more quickly and reduces the effort required to implement Salesforce releases. Faster release adoption results in \$138,000 in labor savings over three years.

68% of survey respondents indicated that Salesforce Professional Services has positioned their organizations to adopt Salesforce AI capabilities, such as Agentforce, more quickly.³

- **Over \$2 million in savings related to user training, ongoing management, and avoided rework.** The composite organization continues to realize benefits well beyond its engagement with Salesforce Professional Services. By prioritizing out-of-the-box features and configuration over customization, the organization avoids accumulating technical debt that is costly to maintain and reduces the need for rework that would have been required to achieve intended platform capabilities. More intuitive workflows, increased automation, and better user experience design also reduce the time required to train Salesforce users. These improvements contribute to reduced training costs, a 30% decrease in ongoing platform management costs, and a 28% reduction in rework and refactoring efforts. In total, these efficiencies result in \$2.8 million in cost savings over three years.

Unquantified benefits. Benefits that provide value for the composite organization but are not quantified for this study include:

- **Increased platform value and better business outcomes.** The composite organization realizes more value from its Salesforce investment than it would have without Salesforce Professional Services and experiences business outcomes including improved customer experience and employee productivity.
- **Self-sufficiency.** Salesforce Professional Services establishes best practices, operating models, governance structures, and a Salesforce center of excellence, ensuring that the composite's internal teams can self-sufficiently maintain and innovate on the Salesforce platform after the engagement concludes.
- **Improved security and data strategy.** Salesforce Professional Services provides guidance and expertise to help the composite organization strengthen its security strategy, aligning it with best practices and reducing risk. It also supports the composite organization in maturing its data strategy by designing a comprehensive data architecture and integration roadmap.
- **Partner collaboration.** The composite organization's incumbent consulting partner collaborates with Salesforce Professional Services during the engagement, sharing its expertise to accelerate delivery and drive project outcomes.

Costs. Three-year, risk-adjusted PV costs for the composite organization include:

- **Engagement costs.** The composite incurs \$1.9 million in engagement costs for the 12-month engagement.
- **Project management and change management costs.** The composite organization allocates internal resources to coordinate workstreams and manage collaboration with Salesforce Professional Services and manage change efforts, resulting in \$293,000 in labor costs over the course of the engagement.

The financial analysis that is based on the interviews and survey found that a composite organization experiences benefits of \$8.2 million over three years versus costs of \$2.2 million, adding up to a net present value (NPV) of \$6.0 million and an ROI of 272%.

90% of survey respondents believe that the benefits of Salesforce Professional Services outweigh the costs.⁴

“The level of impact from Salesforce Professional Services has far surpassed our expectations. They’ve set us up really well to execute our long-term roadmap. We can already say that we have not just a return on investment but have a bright outlook for the next three years.”

Chief technology officer, nonprofit

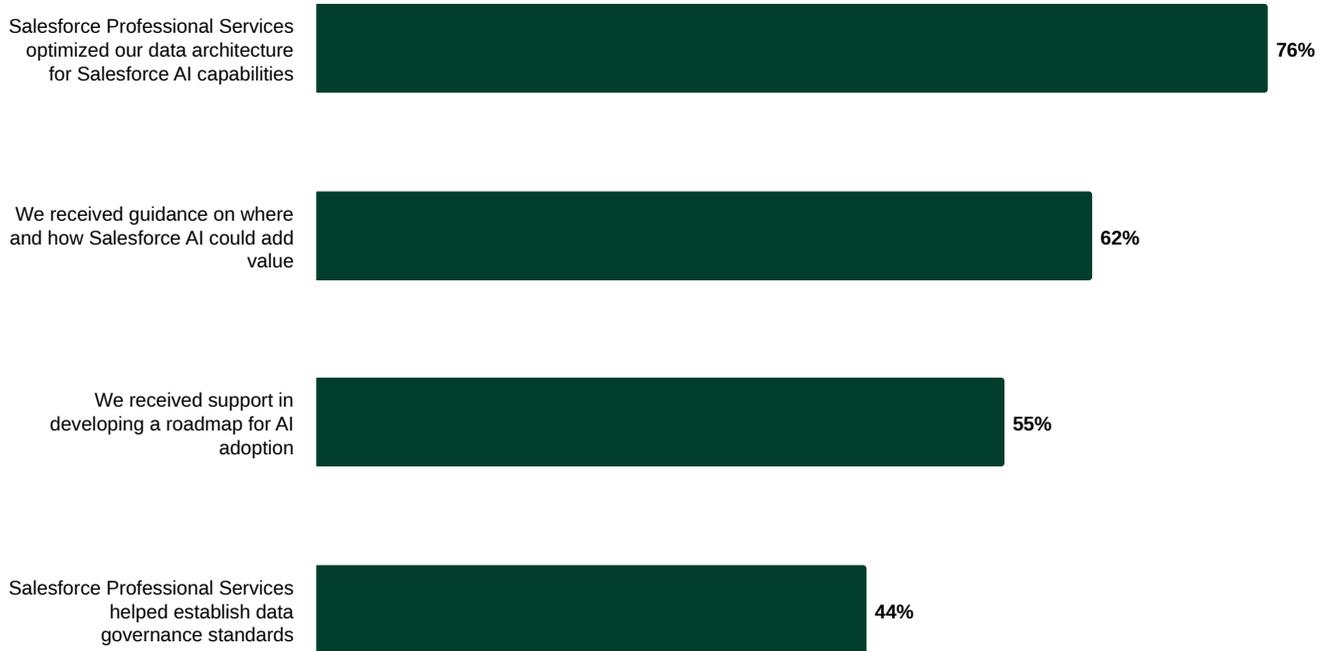
“We made this investment to build a foundation for our future. It has helped our sales reps stay better connected to the broader enterprise, enabling both employees and customers to benefit from a seamless omnichannel experience. That investment will continue to pay dividends in the years to come because we can now build off an out-of-the-box platform. We can take the latest updates from Salesforce and just turn them on. That’s the position we’re in, versus a very customized position that required a lot of money and a lot of extra work in the past.”

Director of product management, insurance

“Salesforce Professional Services enabled us to get our product to market as fast as possible to begin realizing business value. It has provided us with a solid foundation to realize our customer-driven vision.”

Technology and digital product director, insurance

You noted that Salesforce Professional Services positioned your organization to adopt Salesforce AI capabilities (e.g., Agentforce) more quickly in the future. In what ways did it support your organization's readiness?



Base: 146 IT and business decision-makers responsible for CRM who indicated that their organizations were positioned to more quickly adopt Salesforce AI capabilities due to Salesforce Professional Services

Source: A commissioned study conducted by Forrester Consulting on behalf of Salesforce, September 2025

Key Statistics

272%

Return on investment (ROI)

\$8.2M

Benefits PV

\$6.0M

Net present value (NPV)

Benefits (Three-Year)



The Salesforce Professional Services Customer Journey

Drivers leading to the Salesforce Professional Services investment

Interviews				
Role	Industry	Region	Annual Revenue	Employees
Director of product management	Insurance	US	\$117 billion	65,000
Technology and digital product director	Insurance	US	\$20 billion	11,000
Implementation director	Nonprofit	US	\$2.3 billion	7,600
Head of CIO office	Electronics	EMEA	\$434 million	570
Chief technology officer	Nonprofit	US	\$203 million	165

Key Challenges

Both interviewees and survey respondents (“decision-makers”) engaged with Salesforce Professional Services at various points in their organizations’ Salesforce journeys to address a range of organizational and/or platform challenges. Prior to working with Salesforce Professional Services, the decision-makers’ organizations were in one or more of the following moments in their Salesforce journeys:

- Had several instances of Salesforce that required rationalization.
- Had an existing Salesforce implementation but needed support to deploy a new product or capability.
- Were new to the Salesforce platform and needed help with the initial implementation.
- Had previously attempted a Salesforce implementation, but efforts failed.⁵

Decision-makers noted how their organizations struggled with common challenges, including:

- **Difficulty in driving business value from the investment.** Decision-makers shared that their prior implementation approaches did not effectively address business needs, with 60% of respondents reporting that their organizations were not getting expected or full value from their existing deployments.⁶ For example, the chief technology officer at a nonprofit shared that their company had expanded its investment in Salesforce to support grant-making operations. However, its implementation attempt failed, leaving the organization with a highly custom and unstable platform, which ultimately did not support mission-critical processes. Similarly, the technology and digital product director at an insurance company explained that their organization had multiple disconnected instances of Salesforce in use across divisions within the organization. These siloed deployments were not designed for scale and failed to deliver a unified customer experience.
- **Lack of internal expertise.** The decision-makers shared that they required specialized expertise to either fix an existing deployment or execute a net-new implementation. In fact, 49% of respondents reported that they lacked internal expertise or bandwidth to execute their Salesforce implementations or projects successfully.⁷ The head of the CIO office at an electronics company implementing Agentforce explained that external support was critical to adopt the newly introduced AI solution efficiently and effectively. They shared: “We realized quite quickly that we didn’t have the skills for Agentforce in-house because it was brand new. It was such a new product that to be able to succeed, we needed somebody externally who could really help. The best way to succeed in the shortest amount of time was to ask Salesforce for help.” Similarly, the implementation director at a nonprofit shared that they lacked the internal expertise to successfully reconfigure their platform

foundation and enable better integration with critical business applications: “We did not have the in-house expertise to do the configuration of this needed capability to achieve our goals.”

- **Customization that limited agility and innovation.** Decision-makers reported that their existing Salesforce environments were heavily customized, relying on custom-coded functionality rather than out-of-the-box features. On average, survey respondents estimated that 42% of their Salesforce implementation was built using custom code prior to engaging Salesforce Professional Services.⁸ Interviewees with existing deployments similarly noted that their environments were fully custom-built. This level of customization increased maintenance complexity and made it more difficult to adopt new Salesforce innovations or extend functionality efficiently.

“As our company grew, we realized we needed to operate with the same best practices as our industry peers. But we didn’t have the subject matter expertise to know what those best practices looked like or how others approached similar challenges. That was the problem we were trying to solve. Our professional services support helped us understand those best practices.”

Implementation director, nonprofit

“We needed guidance on setting guardrails and instructions to ensure that the [AI agent] responses reflected the tone and language we wanted, and that everything was configured efficiently. Salesforce Professional Services came in with subject matter experts for both Agentforce and AI in general.”

Head of CIO office, electronics

Why Salesforce Professional Services?

The decision-makers’ organizations engaged Salesforce Professional Services to:

- **Tap into Salesforce’s implementation expertise.** Interviewees shared that working with Salesforce Professional Services enabled their organizations to tap into differentiated product knowledge and implementation expertise. In fact, 70% of survey respondents indicated that their organizations engaged professional services directly from Salesforce to benefit from the vendor’s implementation expertise. Decision-makers also noted that direct access to Salesforce’s technical and product experts was a unique advantage, providing visibility into upcoming innovations and product roadmaps. This access enabled organizations to align their Salesforce strategies with future platform capabilities. The chief technology officer at a nonprofit said: “With Salesforce, they provide deep expertise and product subject matter experts that many others can’t match. The other benefit is that they have access to the product roadmap to know exactly how to steer you if you’re making a decision that may be impacted down the road.”
- **Gain a path to self-sufficiency.** Decision-makers said that their organizations turned to Salesforce Professional Services with the goal of creating more sustainable platform foundations and reducing long-term platform management costs, with 66% of respondents indicating that they chose to engage professional services directly from Salesforce because it provided a path to self-sufficiency.⁹ Several interviewees also saw partnering with Salesforce Professional Services as an opportunity to upskill internal teams. For instance, the technology and digital product director at an insurance company said: “The goal was never for them to stay engaged forever. During the initial phase, Salesforce Professional Services held our hand every step of the

way, but over time their involvement tapered off. Their role was to sit side by side with us, transfer the skills and knowledge we needed, and enable us to operate more cost-effectively in the long run.”

- **Improve end-to-end accountability.** Salesforce Professional Services provided end-to-end accountability for the success of the decision-makers’ engagements, with 44% of survey respondents citing this as a reason for working directly with Salesforce.¹⁰ As both the solution vendor and professional service provider, Salesforce had a unique interest in ensuring that decision-makers’ platforms were properly deployed and delivering intended business outcomes.
- **Improve time to business value.** Several interviewees noted that time to value was an important factor for their organizations and said that Salesforce Professional Services offered velocity for their implementations. The chief technology officer at a nonprofit shared that their organization was on a tight deadline to remediate their failed deployment before the company’s busy season. During scoping, Salesforce Professional Services demonstrated its ability to meet the organization’s needs by developing a clear design plan that outlined the proposed sprints to achieve functional requirements and business objectives. The interviewee’s past experiences working with Salesforce Professional Services reinforced their trust in Salesforce’s ability to deliver against the project objectives. Additionally, the implementation director at a nonprofit said that they brought in Salesforce Professional Services to cost-effectively increase delivery velocity without expanding internal headcount, using targeted expertise to support design, adoption, and configuration while maintaining a lean, long-term operations and maintenance footprint.

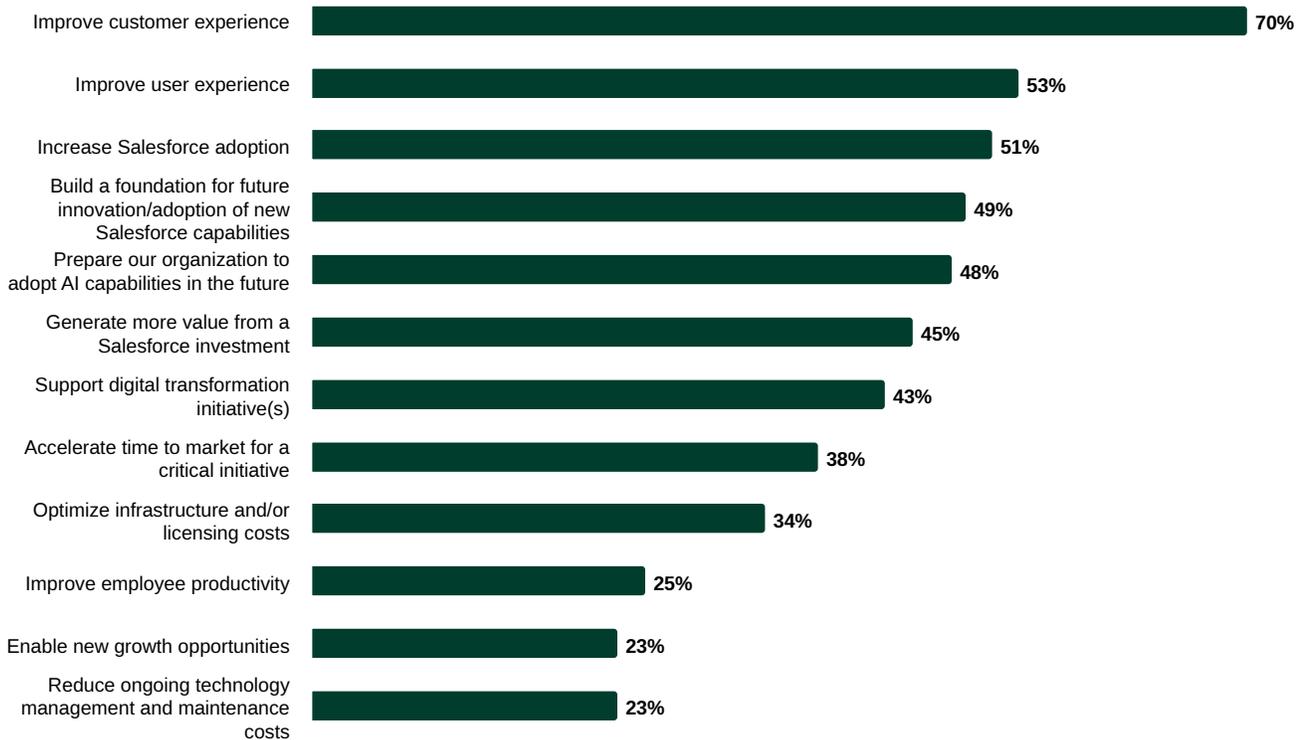
“Our mindset was that if we didn’t do it right this time, we would lose credibility with our user group. My thought process was: Who knows their product better than anyone else? It’s Salesforce. Based on the plan Salesforce presented, including how they would onboard to our strategy and start the implementation, they made it crystal clear they were a partner we could trust. They had a plan, and we just needed to execute it together.”

Technology and digital product director, insurance

“We engaged Salesforce Professional Services to help diagnose what went wrong in the prior implementation, understand the true value of Salesforce, and learn how to leverage its capabilities effectively. The goal was to take a holistic view of the solution and unlock the tools the organization knew Salesforce could deliver.”

Chief technology officer, nonprofit

What were the main business objectives of your engagement with Salesforce Professional Services?



Base: 216 IT and business decision-makers with responsibility for CRM

Source: A commissioned study conducted by Forrester Consulting on behalf of Salesforce, September 2025

“Our vision is to be the most trusted and valued customer-driven insurance company. Partnering with Salesforce, which offers a best-in-class CRM solution, aligns perfectly with that vision of understanding our customers inside and out, seamlessly picking up where we left off, and leveraging out-of-the-box AI capabilities to deliver timely, personalized recommendations.”

Technology and digital product director, insurance

Composite Organization

Based on the interviews and survey, Forrester constructed a TEI framework, a composite company, and an ROI analysis that illustrates the areas financially affected. The composite organization is representative of the interviewees’ and survey respondents’ organizations, and it is used to present the aggregate financial analysis in the next section. The composite organization has the following characteristics:

- **Description of composite.** The composite organization is a multibillion-dollar company with 10,000 employees. Seventy-five percent of the employees use Salesforce, and the organization spends millions of dollars each year on licensing across various Salesforce CRM clouds.

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- **Deployment characteristics.** Before engaging with Salesforce Professional Services, the organization has several disconnected instances of Salesforce. The previous deployments were highly customized and siloed between business units and regions. The composite organization engages Salesforce Professional Services as part of a rearchitecting exercise to create a unified Salesforce platform that consolidates existing instances within a single architecture, delivers a 360-degree view of customers, and establishes a foundation for future innovation. As part of this transformation, the composite organization unifies on a single industry cloud and builds a flexible architecture that enables integration with Salesforce's data and analytics products, such as Tableau, and AI capabilities like Agentforce.

Salesforce embeds a team of consultants for a 12-month engagement, providing hands-on advisory, implementation services, and change management support. The engagement concludes within Year 1 of the investment.

KEY ASSUMPTIONS

- 10,000 employees
- 7,500 Salesforce users
- 12-month Salesforce Professional Services engagement

Analysis Of Benefits

Quantified benefit data as applied to the composite

Total Benefits						
Ref.	Benefit	Year 1	Year 2	Year 3	Total	Present Value
Atr	Shorter implementation savings	\$0	\$1,951,200	\$0	\$1,951,200	\$1,612,562
Btr	Accelerated business value	\$429,975	\$2,881,800	\$0	\$3,311,775	\$2,772,539
Ctr	Reduced risk of project failure savings	\$224,500	\$379,000	\$531,500	\$1,135,000	\$916,638
Dtr	Faster adoption of Salesforce innovation	\$0	\$87,231	\$87,231	\$174,462	\$137,630
Etr	Long-term savings	\$0	\$2,334,525	\$1,098,625	\$3,433,150	\$2,754,773
	Total benefits (risk-adjusted)	\$654,475	\$7,633,756	\$1,717,356	\$10,005,587	\$8,194,142

Shorter Implementation Savings

Evidence and data. Decision-makers reported that their organizations reached their project objectives more quickly with Salesforce Professional Services than they would have without it, reducing their implementation timelines between 24% to 50%. By shortening timelines, decision-makers avoided internal labor and incremental consulting costs. They shared the following experiences:

- Seventy-two percent of survey respondents reported that Salesforce Professional Services reduced the overall time required for their organizations' implementations or projects. On average, respondents completed their Salesforce engagements in 13 months and estimated that, without support from Salesforce Professional Services, it would have taken an additional four months to complete. This represents a 24% reduction in implementation time.¹¹
- The director of technology and digital products at an insurance company noted that Salesforce Professional Services helped their company complete its enterprisewide core CRM implementation project in 12 months. Based on timelines from the organization's previous failed deployments, the interviewee estimated that the project would have taken an additional six to eight months without Salesforce's support. In addition to accelerating delivery, the organization was able to launch twice the number of capabilities. The interviewee said that Salesforce Professional Services accelerated the implementation by creating an outcomes-focused roadmap, applying deep product expertise, and using a tested playbook of best practices to avoid implementation risks and delays.

"[Salesforce Professional Services] knows their product better than anyone, and with the product evolving so quickly, that expertise is critical. They also bring experience from working with many other companies, offering a playbook of proven practices based on what works and what doesn't. The value of the partnership is that we were able to leverage the tactics in that playbook that were aligned to our strategy and culture."

Director of technology and digital products, insurance

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- The director of product management at an insurance company reported that their organization completed its Salesforce Health Cloud implementation in 12 months and estimated that it would have taken a year and a half longer without Salesforce Professional Services. This efficiency was driven by Salesforce Professional Services' emphasis on leveraging core platform capabilities rather than building unnecessary customizations. The interviewee shared that Salesforce Professional Services guided the organization to use core features, clearly outlined where business processes needed to adapt, facilitated conversations with stakeholders to drive alignment, and supported change management efforts. These efforts enabled the organization to execute a lean, efficient project plan.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Without Salesforce Professional Services, the composite organization's implementation project would take 20 months to complete, ending eight months into Year 2.
- Salesforce Professional Services shortens the project duration by 40%, reducing the engagement to 12 months.
- The composite organization avoids eight months of implementation time in Year 2. Without Salesforce Professional Services, the average monthly costs of the composite's internal labor and its consulting partner would be \$271,000. This includes the cost of labor for 10 internal resources at an average fully burdened monthly cost of \$13,750 per resource plus \$133,000 in monthly consulting partner fees.

Risks. Forrester recognizes that these results may not be representative of all experiences. The impact of this benefit will vary depending on:

- The scope and complexity of an organization's Salesforce engagement.
- The number of internal resources that would be required to support an implementation without Salesforce Professional Services.
- Variation in internal labor and systems integrator (SI) costs.
- Internal factors that may impact the length and progress of an engagement, such as organizational readiness and project risks.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.6 million.

40%

Reduction in implementation duration

Shorter Implementation Savings					
Ref.	Metric	Source	Year 1	Year 2	Year 3
A1	Expected implementation duration without Salesforce Professional Services (months)	Surveys and interview data	12	8	0
A2	Expected implementation duration with Salesforce Professional Services (months)	Surveys and interview data	12	0	0
A3	Implementation time avoided as a result of Salesforce Professional Services	A1-A2	0	8	0
A4	Internal labor and consulting costs per month without Salesforce Professional Services	Interviews and TEI references	\$271,000	\$271,000	\$271,000
At	Shorter implementation savings	A3*A4	\$0	\$2,168,000	\$0
	Risk adjustment	↓10%			
Atr	Shorter implementation savings (risk-adjusted)		\$0	\$1,951,200	\$0
Three-year total: \$1,951,200			Three-year present value: \$1,612,562		

Accelerated Business Value

Evidence and data. The decision-makers’ organizations realized business value faster than they would have without Salesforce Professional Services. With shorter project timelines and faster releases of MVPs, organizations improved time to value for business outcomes aligned with their respective Salesforce engagements. These MVPs provided users with access to core capabilities, creating a foundation for iterative enhancements as their engagements progressed. Decision-makers shared the following experiences:

- The majority of survey respondents indicated that Salesforce Professional Services reduced the overall time required for their organization’s implementation projects, with 83% reporting reduced time to MVP. On average, respondents estimated that Salesforce Professional Services reduced time to MVP by three months.¹² With this acceleration, these organizations achieved business outcomes, such as improved customer experience and improved employee productivity, faster.

“If there are companies out there that want to get their Salesforce solutions to market as fast as they possibly can to start realizing the business value of their investment, I don’t know why they would consider any other resource.”

Technology and digital product director, insurance

- The chief technology officer at a nonprofit reported that their organization completed an MVP for its platform stabilization project in six months, estimating it would have taken twice as long without Salesforce Professional Services. To meet a critical deadline ahead of the organization’s busy season, Salesforce Professional Services developed an implementation plan aligned to key capabilities and structured the work into targeted sprints, leveraging out-of-the box features to ensure timely MVP delivery. The interviewee attributed this acceleration to Salesforce Professional Services’ project management expertise and engagement model, noting: “The project management is probably some of the best that I’ve seen in the industry. One thing that also sets Salesforce Professional Services apart is their full-time model. Their teams work exclusively on your project, which allows them to move at a velocity you typically wouldn’t see. Their project managers almost act as product owners and are deeply knowledgeable about the platform, which really sets them apart.”
- The head of CIO office at an electronics company noted that the organization achieved an MVP for its first AI agent built on Agentforce in just three weeks. They estimated that the process would have taken over two months longer without Salesforce

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Professional Services. The interviewee attributed this acceleration to the team's product expertise and guidance on AI best practices and use cases, which helped the organization configure guardrails, optimize knowledge articles, test and refine outputs to ensure quality and trust, and launch efficiently. By shortening the time to MVP, the organization captured benefits earlier, including improved case deflection, increased capacity for customer service representatives, and enhanced customer experiences through 24/7 support.

“Looking at the original MVP, delivering it on our own or with other support would have taken longer than the three weeks we achieved with Salesforce Professional Services. I would estimate it would have been closer to three months.”

Head of CIO office, electronics

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Forrester referenced research from recent TEI studies commissioned by Salesforce to model the composite organization's average net benefits. This is a representative measure of business outcomes that would be achieved by an organization using Salesforce without the help of Salesforce Professional Services. Without Salesforce Professional Services, the composite organization would begin realizing platform benefits in Year 2 at a value of \$1,911,000 and \$4,803,000 in Year 3.¹³
- With Salesforce Professional Services, the composite organization accelerates its implementation timeline. In Year 1, the composite builds an MVP three months earlier than it would have without Salesforce Professional Services' support, unlocking three months of additional platform value that would otherwise be delayed until Year 2.
- In Year 2, the organization completes its full Salesforce implementation eight months faster than it would have without the help of Salesforce Professional Services. This acceleration enables it to realize eight months of platform value within Year 2 that it otherwise would have realized in Year 3.

Risks. Forrester recognizes that these results may not be representative of all experiences. The impact of this benefit will vary depending on:

- The actual business value realized by using the Salesforce over time.
- The degree to which an organization realizes platform value from an MVP.
- The scope and complexity of an organization's Salesforce engagement.
- Internal factors that may impact the length and progress of an engagement outside of Salesforce Professional Services' control, such as organizational readiness.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$2.8 million.

3 months

Reduced time to MVP

Accelerated Business Value					
Ref.	Metric	Source	Year 1	Year 2	Year 3
B1	Average net benefits that would be realized from an implementation without Salesforce Professional Services	Forrester TEIs for Salesforce	\$0	\$1,911,000	\$4,803,000
B2	Monthly accrued business value (rounded)	B1/12	\$0	\$159,250	\$400,250
B3	Time of accelerated business value from faster time to MVP and implementation completion with Salesforce Professional Services	Y1: surveys and interviews; Y2: A3	3	8	0
Bt	Accelerated business value	B2 (next year)*B3	\$477,750	\$3,202,000	\$0
	Risk adjustment	↓10%			
Btr	Accelerated business value (risk-adjusted)		\$429,975	\$2,881,800	\$0
Three-year total: \$3,311,775			Three-year present value: \$2,772,539		

Reduced Risk Of Project Failure Savings

Evidence and data. Decision-makers reported that Salesforce Professional Services played an important role in guaranteeing project success. Survey respondents shared that engaging Salesforce Professional Services reduced the risk of project failure by an average of 51%, compared to other implementation approaches.¹⁴ Salesforce Professional Services reduced risk by:

- Providing deep product and implementation expertise.** Several interviewees underscored the value of Salesforce’s deep product and implementation expertise in ensuring project success. The implementation director at a nonprofit said: “I felt like they not only understood our problems but also understood them through the lens of all the companies in our industry and what they are trying to do. The architects that we had access to understood the longer-term risks if we didn’t set something up right from the get-go. That knowledge was important because when you’re turning on a whole new application or system for the entire population of your company, you don’t really want to do trial and error.” The head of CIO office at an electronics company emphasized that Salesforce Professional Services’ expertise was particularly critical for the organization’s Agentforce implementation, helping it properly configure its agents with the right guardrails.

“I would say that Salesforce Professional Services has an over 98% [success] rate based off projects I’ve worked on with them on over the years. I have so much confidence in those teams to deliver, and I’ve yet to be let down by them.”

Chief technology officer, nonprofit

“Knowing that we had two previous attempts and we failed, I estimate that we reduced our risk to fail by 80% [by using Salesforce Professional Services].”

Technology and digital product director, insurance

- **Delivering end-to-end accountability.** Because Salesforce was uniquely positioned as both the vendor and professional service provider, the decision-makers' organizations had reassurance that Salesforce Professional Services was committed to their success. The technology and digital product director at an insurance company said: "The refreshing part about working with Salesforce Professional Services is that they had a vested interest in the success of our implementation."
- **Driving quality assurance and governance.** The implementation director at a nonprofit said that Salesforce Professional Services structured its delivery teams to include critical roles such as a scrum master and a dedicated QA resource. These embedded roles helped enforce governance standards, align stakeholders, and ensure quality through rigorous testing throughout the engagement. This structure reduced the risk of misconfigurations, downstream rework, and security issues.
- **Supporting change management.** Interviewees said that Salesforce Professional Services helped reduce adoption risks by supporting change management throughout the engagement. The director of product management at an insurance company described how Salesforce Professional Services launched an ambassador program early during the implementation, engaging sales agents to gather direct feedback, build buy-in, and prepare users for the transition. The chief technology officer at a nonprofit said: "We went with a train-the-trainer model, which went really well. Salesforce's change management resources worked hand in hand with people on our team, like our training lead, to ensure that we were successful and to make sure the train-the-trainer program ran smoothly."

"Salesforce Professional Services provided change management resources focused entirely on user readiness. Their efforts ensured that by the time they transitioned off, our users were fully prepared."

Technology and digital product director, insurance

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Forrester referenced research from recent TEI studies to model the average value of risk tied to Salesforce platform benefits. This value represents the incremental benefit that an organization could realize if all implementation and impact risks were fully mitigated. The value of this risk is \$449,000, \$758,000, and \$1,063,000 in Year 1, Year 2, and Year 3, respectively.¹⁵
- The composite organization reduces its risk of project failure by 50% through engaging Salesforce Professional Services. The risk reduction enables the organization to effectively capture 50% of the platform benefits that might otherwise be lost due to implementation and impact risks.

Risks. Forrester recognizes that these results may not be representative of all experiences and the benefit will vary. There will always be some level of implementation and impact risk in a technology investment. Therefore, Forrester has limited the risk reduction to 50%.

Results. To account for these risks, Forrester adjusted this benefit downward by 0%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$917,000.

50%

Reduced risk of project failure with Salesforce Professional Services

Reduced Risk Of Project Failure Savings					
Ref.	Metric	Source	Year 1	Year 2	Year 3
C1	Average value of project risk	Composite	\$449,000	\$758,000	\$1,063,000
C2	Reduced risk of project failure with Salesforce Professional Services	Interviews	50%	50%	50%
Ct	Reduced risk of project failure savings	C1*C2	\$224,500	\$379,000	\$531,500
	Risk adjustment	0%			
Ctr	Reduced risk of project failure savings (risk-adjusted)		\$224,500	\$379,000	\$531,500
Three-year total: \$1,135,000			Three-year present value: \$916,638		

Faster Adoption Of Salesforce Innovation

Evidence and data. Salesforce releases software updates three times a year with new features and platform enhancements. In the survey, 85% of respondents reported that engaging Salesforce Professional Services enabled their organizations to adopt new Salesforce releases sooner. These survey respondents shared that their organizations reduced the time to adopt releases by 26%.¹⁶ Decision-makers noted that Salesforce Professional Services positioned their organizations to adopt Salesforce releases sooner by:

- Focusing on configuration over customization.** Salesforce enabled the decision-makers' organizations to build more flexible, secure platform foundations by limiting customization. In fact, 74% of survey respondents reported that Salesforce Professional Services helped their organizations architect their platforms using out-of-the box features and configuration over customization. On average, respondents reduced customization by about 10 percentage points, with the level of customization dropping from 42% before engaging Salesforce Professional Services to 33% after.¹⁷ Similarly, the chief technology officer at a nonprofit estimated that their prior implementation was built with nearly 100% custom code, limiting their agility in adopting new Salesforce releases. After engaging Salesforce Professional Services, the level of customization was reduced to an estimated 38%. This reduced the time to adopt new releases from three three-week sprints down to just one sprint. Similarly, the implementation director at a nonprofit cited that Salesforce Professional Services limited customization to 20%, reducing the time to adopt releases by up to a month.

“Previously, adopting a new Salesforce release in our highly customized environment could take up to three sprints: one for research, one for build and testing, and sometimes a third to finish functionality. Today, it takes just one sprint. We’ll review the release notes and then we haven’t had anything pop up yet that we’ve had to worry about.”

Chief technology officer, nonprofit

“We ended up landing at 78% out of the box. We’re getting ready to take the first update from Salesforce Professional Services next month and, right now, my technical teams are signaling they’re not seeing any conflicts or issues with that. That’s exactly where you want to be, right? Being able to update seamlessly and not have to tweak anything along the way.”

Director of product management, insurance

- **Improved internal skilling.** Interviewees also noted that working alongside experts from Salesforce Professional Services helped upskill internal technical teams, enabling them to adopt agile practices, gain product knowledge, and drive innovation. The implementation director at a nonprofit said: “Salesforce took a ‘teach a man to fish’ approach. They were great at teaching my team agile practices and what it means to work in an agile way.” The technology and digital product director at an insurance company detailed how pairing internal resources with Salesforce experts enabled upskilling and improved release adoption: “We took a two-in-the-box approach, pairing people and having them upskill alongside experts who know their product so well. When these releases come out, our team is ready and understands what opportunities we have based on what we’ve built and what these enhancements are offering. I truly believe that if we had not paired with the Salesforce Professional Services resources, we would not have that depth of knowledge.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite organization adopts three Salesforce releases annually in Year 2 and Year 3.
- Without Salesforce Professional Services, each new release would take 25 weeks of effort to adopt.
- After the engagement, the composite adopts releases 26% more quickly, saving 20 weeks per release.
- The composite organization has two Salesforce administrator FTEs tasked with implementing new releases.
- The fully burdened annual salary of a Salesforce administrator is \$126,000.

Risks. Forrester recognizes that these results may not be representative of all experiences. The impact of this benefit will vary depending on:

- The number of Salesforce releases an organization chooses to adopt.
- An organization’s level of customization before and after Salesforce Professional Services.
- The number of internal resources tasked with managing releases.
- The burdened cost of resources, which will vary by employee expertise, business and employee geography, and industry.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$138,000.

26%

Faster adoption of Salesforce innovation

Faster Adoption Of Salesforce Innovation					
Ref.	Metric	Source	Year 1	Year 2	Year 3
D1	Number of Salesforce platform releases adopted	Composite	0	3	3
D2	Weeks to adopt a new release without Salesforce Professional Services	Survey data	25	25	25
D3	Release adoption acceleration after Salesforce Professional Services engagement	Survey data	26%	26%	26%
D4	Weeks saved for release adoption	D1*D2*D3	0	20	20
D5	Number of developer FTEs working on releases	Composite	2	2	2
D6	Fully burdened annual salary of Salesforce administrator	Composite	\$126,000	\$126,000	\$126,000
Dt	Faster adoption of Salesforce innovation	D4*D5*D6/52	\$0	\$96,923	\$96,923
	Risk adjustment	-10%			
Dtr	Faster adoption of Salesforce innovation (risk-adjusted)		\$0	\$87,231	\$87,231
Three-year total: \$174,462			Three-year present value: \$137,630		

Long-Term Savings

Evidence and data. The decision-makers’ organizations realized long-term benefits after their engagement with Salesforce Professional Services. In fact, 86% of survey respondents reported that working with Salesforce Professional Services helped reduce their organizations’ long-term operations and management costs.¹⁸ Decision-makers said that Salesforce Professional Services helped them:

- Reduce technical debt.** In the survey, 63% of respondents reported reduced technical debt following their Salesforce Professional Services engagements.¹⁹ The chief technology officer at a nonprofit shared that the Salesforce Professional Services team created a roadmap to embrace native Salesforce features and integrations that the organization had already licensed, enabling them to sunset custom integrations and redundant tools. They also noted that Salesforce Professional Services helped the organization optimize its data strategy and reduce excess storage use, eliminating overage fees of \$15,000 per month. Additionally, the director of product management at an insurance company emphasized Salesforce Professional Services’ focus on leveraging out-of-the-box capabilities over customization to avoid accumulating technical debt that could become costly and difficult to manage as the business evolved. Similarly, the technology and digital product director at an insurance company said that Salesforce Professional Services advised their organization on decreasing technical debt by reducing redundant licenses, consolidating instances, and leveraging native Salesforce capabilities for multiple use cases, allowing the organization to retire overlapping solutions and associated costs.

“Salesforce Professional Services look for ways to lean out your technology. They’re able to provide a really lean architecture and perspective and helped us work smarter with our technologies. Hands down, yes. They’ve been able to help us and consult us on how to reduce our tech debt.”

Technology and digital product director, insurance

The Total Economic Impact™ Of Salesforce Professional Services

- **Avoid rework.** Over half of survey respondents reported a reduced need for rework and refactoring of code as a result of their engagement with Salesforce Professional Services, with an average reduction of 28%.²⁰ The implementation director at a nonprofit estimated that working with Salesforce Professional Services saved their organization millions of dollars in long-term rework costs, based on prior experiences of unsuccessful implementations. They said: “The rough order of magnitude to rewrite code will cost you millions on top of what you’ve already invested. And we saw that happen in some cases before. By engaging with the right partner that can deliver results, I believe you’re going to save yourself the rework of that entire effort. In the context of our engagement, I put that as 2 to 3 million dollars.”
- **Reduce ongoing systems management effort.** On average, survey respondents reported a reduction in Salesforce operations and management costs of 10%. The chief technology officer at a nonprofit shared that their organization’s prior deployment approach left it with a highly unstable platform, requiring a team of 12 technical staff working overtime to keep the system running. After engaging Salesforce Professional Services to rework the deployment, the ongoing management burden was significantly reduced to nine people working standard schedules. The director of product management at an insurance company shared: “Right now, we’re looking at keeping our run budget, which is what we use for maintenance, to remain steady next year. But as we look into the following year, I see the opportunity to decrease that now that the system is more efficient.”
- **Reduce training requirements.** Survey respondents reported a measurable reduction in training-related effort and costs following deployment. Fifty-nine percent of organizations cited lower training costs and faster employee ramp-up times, with an average reduction of 11 hours in training time per employee. This impact may be driven by consolidation of disparate systems and tools, intuitive workflow and user experience design, and increased automation, which may simplify user training requirements and accelerate time to user effectiveness.

11 hours

Reduced annual cost of training per employee after Salesforce Professional Services

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Each of the composite organization’s 7,500 Salesforce users participate in training starting in Year 2, once the implementation project is complete. In Year 3, an additional 1,875 new hires participate in user training, accounting for turnover.
- By engaging Salesforce Professional Services, training time per employee is decreased by 11 hours, as a result of reducing point solutions, incorporating intuitive workflow design, and automation.
- The hourly fully burdened cost of an average Salesforce user is \$47.
- Half of the Salesforce training time savings are recaptured productively.
- Without Salesforce Professional Services, the composite organization requires five technical FTEs for ongoing maintenance.
- By working with Salesforce Professional Services, the composite organization reduces ongoing management costs by 30%, starting in Year 2, once the implementation project is complete.
- The average fully burdened annual cost of a Salesforce technical resource tasked with ongoing management is \$165,000.
- Without Salesforce Professional Services, the composite organization’s annual rework and refactoring costs are \$2 million in Year 2 and Year 3. Rework costs include expenses associated with fixing errors or issues that are not addressed during the initial Salesforce implementation. Refactoring costs include efforts to restructure existing code or architecture to improve quality and maintainability.
- Salesforce Professional Services reduces rework and refactoring needs by 28%, conservatively.

Risks. Forrester recognizes that these results may not be representative of all experiences and the benefit will vary depending on:

- The number of Salesforce users within an organization.

The Total Economic Impact™ Of Salesforce Professional Services

- The degree to which training time savings are recaptured productively.
- The complexity of an organization's Salesforce deployment.
- Actual ongoing management requirements that would be required without Salesforce Professional Services.
- Actual rework and refactoring costs that would be incurred without Salesforce Professional Services.

Results. To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$2.8 million.

Long-Term Savings					
Ref.	Metric	Source	Year 1	Year 2	Year 3
E1	Number of Salesforce users participating in training	Composite	0	7,500	1,875
E2	Hours of training saved per employee	Survey	0	11	11
E3	Hourly fully burdened cost of average Salesforce user	Research data	\$47	\$47	\$47
E4	Productivity recapture rate	TEI methodology	50%	50%	50%
E5	Subtotal: training savings (rounded)	E1*E2*E3*E4	\$0	\$1,939,000	\$485,000
E6	FTEs required for ongoing maintenance without Salesforce Professional Services	Interviews	5	5	5
E7	Reduced ongoing management	Interviews and survey	0%	30%	30%
E8	FTE avoidance	E6*E7	0	1.5	1.5
E9	Average fully burdened cost of Salesforce technical resource	Composite	\$165,000	\$165,000	\$165,000
E10	Subtotal: ongoing management savings	E8*E9	\$0	\$247,500	\$247,500
E11	Rework and refactoring costs incurred without Salesforce Professional Services	Interviews	\$0	\$2,000,000	\$2,000,000
E12	Reduced rework and refactoring costs	Survey data	0%	28%	28%
E13	Subtotal: reduced rework and refactoring costs	E11*E12	\$0	\$560,000	\$560,000
E _t	Long-term savings	E5+E10+E13	\$0	\$2,746,500	\$1,292,500
	Risk adjustment	↓15%			
E _{tr}	Long-term savings (risk-adjusted)		\$0	\$2,334,525	\$1,098,625
Three-year total: \$3,433,150			Three-year present value: \$2,754,773		

Unquantified Benefits

Interviewees and survey respondents mentioned the following additional benefits that their organizations experienced but were not able to quantify:

- **Increased platform value and better business outcomes.** Salesforce Professional Services helped many decision-makers' organizations realize more value from their Salesforce investments, which led to business outcomes including improved customer experience and enhanced employee productivity. Half of survey respondents' organizations realized more value from the overall Salesforce investment after engaging with Salesforce Professional Services. These respondents estimated that their organizations realized 8.5x more platform value on average. Eighty-six percent of survey respondents indicated improved employee productivity and user experience as a result of their organization's Salesforce Professional Services engagement. On average, respondents estimated that each Salesforce user within their organization saves two hours per

week due to Salesforce Professional Services' involvement. Furthermore, 84% of respondents reported improved customer experience as an engagement outcome.²¹

"I started looking at ROI across our systems. For MuleSoft, before working with Salesforce Professional Services, we were at about 60% ROI. After engaging, we're now around 90%. For Service Cloud, we were probably at 45% to 50% ROI before they came on board, and now we're at about 80% to 85%, which I think is a really strong improvement."

Chief technology officer, nonprofit

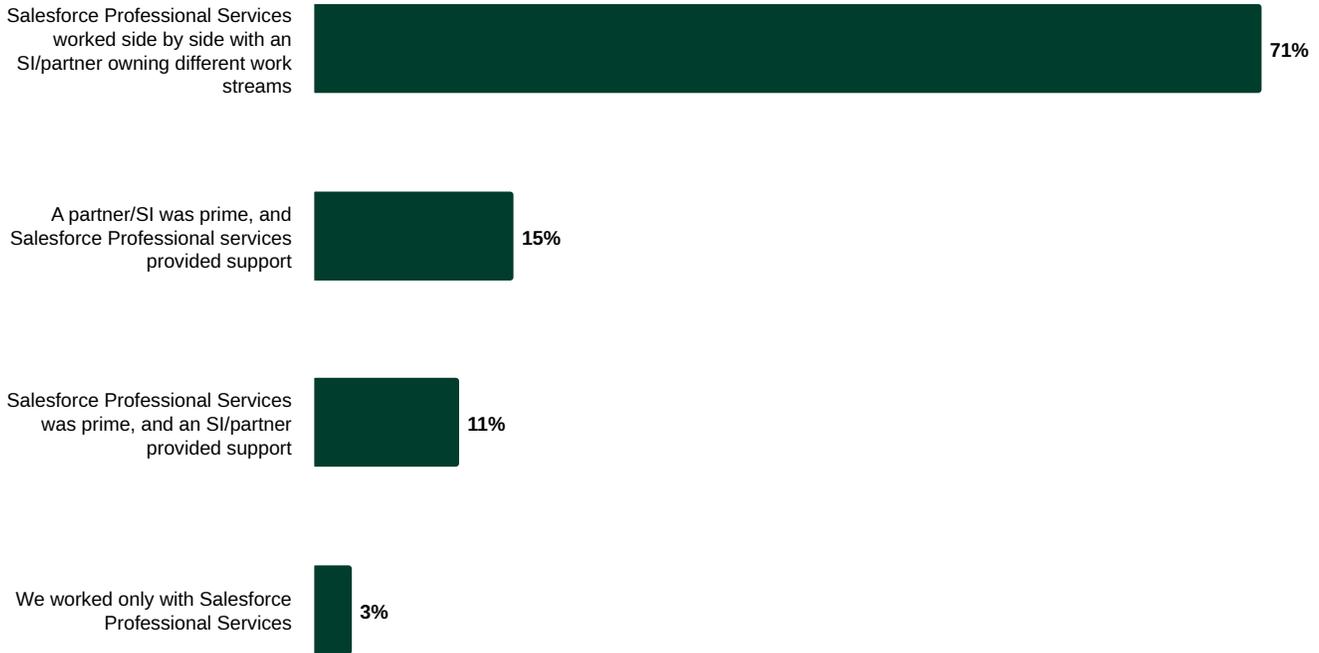
- **Self-sufficiency.** Decision-makers reported that Salesforce Professional Services empowered their teams to gain self-sufficiency, ensuring that their organizations could maintain and innovate on their Salesforce platforms after the engagement ended. Survey respondents noted that Salesforce Professional Services shared best practices, established operating models and governance structures, and set up Salesforce centers of excellence within their organizations.²² The chief technology officer at a nonprofit shared that Salesforce Professional Services taught internal teams agile methodology: "Working hand in hand with Salesforce transformed my team from an ad hoc deployment group into an agile team. That shift has delivered significant value. My team can now advance the platform iteratively and demonstrate ROI for each sprint, following the agile methodology that Salesforce helped establish."

"The Salesforce Professional Services team always reinforced that their goal was to help us sustain on our own."

Technology and digital product director, insurance

- **Improved security and data strategy.** In the survey, 73% of respondents reported improved security as an outcome of their organization's Salesforce Professional Services engagements. The chief technology officer at a nonprofit emphasized that security was a top priority during the engagement and noted that Salesforce Professional Services helped the organization redesign its Salesforce security model to align with best practices. Additionally, over half of survey respondents reported that creating or maturing their organization's data strategies and building comprehensive data architecture and integration strategies were areas where Salesforce Professional Services provided support.²³
- **Partner collaboration.** Several interviewees and most of the survey respondents used Salesforce Professional Services as a complement to a consulting partner. In fact, 97% of respondents indicated that a partner was involved in their organization's engagement with Salesforce Professional Services. In the majority of these cases, Salesforce Professional Services and the partner worked side by side while owning different workstreams. The director of product management at an insurance company explained that their organization engaged Salesforce Professional Services as the engagement lead while retaining their incumbent consultancy for its institutional knowledge. This collaboration allowed the incumbent consultancy to contribute historical context from prior projects while Salesforce Professional Services provided strategic guidance and hands-on implementation support, driving project efficiency and alignment with business needs and processes. The chief technology officer at a nonprofit described a "divide and conquer" approach, with Salesforce Professional Services and the consulting partner managing separate workstreams while collaborating on critical areas such as security.

Did you engage a systems integrator (SI) or other consulting partner organization to work alongside Salesforce Professional Services?



Base: 216 IT and business decision-makers with responsibility for CRM

Source: A commissioned study conducted by Forrester Consulting on behalf of Salesforce, September 2025

Flexibility

The value of flexibility is unique to each customer. There are multiple scenarios in which a customer might implement Salesforce Professional Services and later realize additional uses and business opportunities, including:

- **Flexibility to meet evolving business needs.** The technology and digital product director at an insurance company highlighted that Salesforce Professional Services positioned their organization to address rapidly changing customer expectations in their industry. They said that engaging Salesforce Professional Services enabled the organization to implement a scalable platform foundation with flexibility to adapt to future needs and use cases. They shared: “We needed the capability to keep up with the changing landscape of how customers are interacting with insurance companies. By working with Salesforce Professional Services, we’ve built a platform that we can innovate upon to meet those experiences in the future.”
- **Positioning for AI.** Decision-makers were at varying stages of AI adoption, with 60% of survey respondents reporting that their organization had already implemented AI solutions and another 28% reporting that their organization planned to do so within the next 12 months. Many decision-makers shared that working with Salesforce Professional Services helped position their organizations for future innovation with Salesforce AI capabilities. In fact, 68% of survey respondents indicated that Salesforce Professional Services positioned their organizations to more quickly adopt Salesforce AI capabilities, including Agentforce. For example, the chief technology officer at an insurance company said that Salesforce Professional Services helped prepare their organization for future innovation by minimizing customization and designing an architecture aligned with Salesforce’s roadmap, enabling smoother adoption of emerging capabilities like Agentforce.²⁴

“Limiting customization provides the ability for the business to be agile. The landscape is changing rapidly, and having a platform that allows us to quickly implement updates or adopt new features is so important.”

Chief technology officer, nonprofit

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in [Total Economic Impact Approach](#)).

Analysis Of Costs

Quantified cost data as applied to the composite

Total Costs							
Ref.	Cost	Initial	Year 1	Year 2	Year 3	Total	Present Value
Ftr	Salesforce Professional Services engagement fees	\$0	\$2,100,000	\$0	\$0	\$2,100,000	\$1,909,091
Gtr	Incremental project and change management labor	\$0	\$321,750	\$0	\$0	\$321,750	\$292,500
	Total costs (risk-adjusted)	\$0	\$2,421,750	\$0	\$0	\$2,421,750	\$2,201,591

Salesforce Professional Services Engagement Fees

Evidence and data. Engagement fees for Salesforce Professional Services are based on project scope. Interviewees reported engagement costs ranging between \$700,000 and \$17 million. Pricing will vary. Contact a Salesforce representative for additional details.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite organization incurs \$2 million in engagement fees for the 12-month engagement in Year 1.

Risks. Forrester recognizes that these results may not be representative of all experiences. This cost will vary depending on the organization's scope, duration, and objectives for each engagement.

Results. To account for these risks, Forrester adjusted this cost upward by 5%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.9 million.

Salesforce Professional Services Engagement Fees							
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3	
F1	Salesforce Professional Services engagement fees	Composite		\$2,000,000			
Ft	Salesforce Professional Services engagement fees	F1		\$2,000,000	\$0	\$0	
	Risk adjustment	15%					
Ftr	Salesforce Professional Services engagement fees (risk-adjusted)		\$0	\$2,100,000	\$0	\$0	
Three-year total: \$2,100,000				Three-year present value: \$1,909,091			

Incremental Project And Change Management Labor

Evidence and data. Survey respondents identified time spent on project management as the top internal cost incurred during their Salesforce engagement.²⁵ Interviewees more commonly described leveraging internal product managers to coordinate workstreams and manage collaboration with the Salesforce Professional Services team. Two interviewees also noted that their organization dedicated resources to drive change management in collaboration with Salesforce experts.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

The Total Economic Impact™ Of Salesforce Professional Services

- Two internal resources are assigned to the implementation to support project management. Midway through the engagement, the organization adds a third resource to lead change management efforts, representing an additional 0.5 FTE.
- The fully burdened annual salary of a resource involved in project or change management is \$117,000.

Risks. Forrester recognizes that these results may not be representative of all experiences. This cost will vary depending on:

- The number of project managers and change management resources required to support the implementation project.
- Variation in salaries.

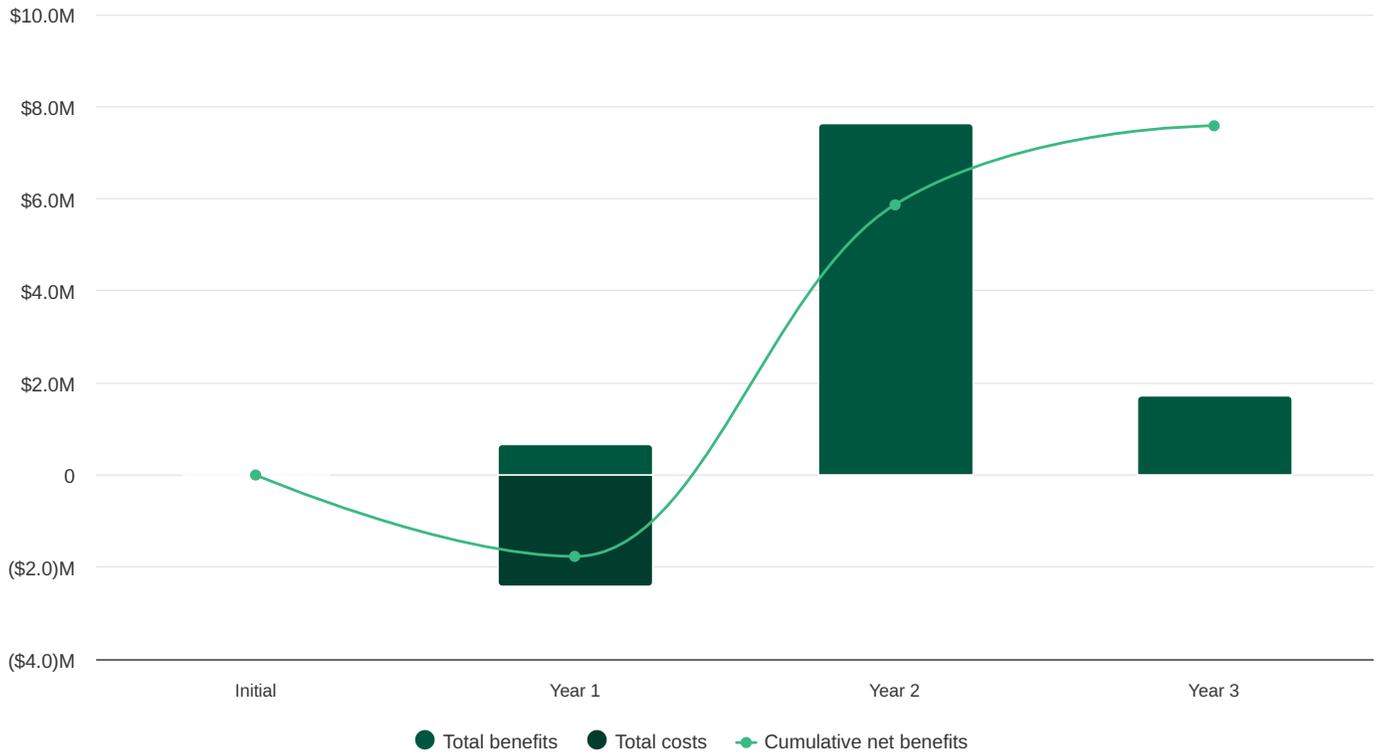
Results. To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$293,000.

Incremental Project And Change Management Labor						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
G1	Number of FTEs dedicated to project and change management	Interviews		2.5		
G2	Fully burdened annual salary of project management and change management resources	Composite		\$117,000		
Gt	Incremental project and change management labor	G1*G2	\$0	\$292,500	\$0	\$0
	Risk adjustment	110%				
Gtr	Incremental project and change management labor (risk-adjusted)		\$0	\$321,750	\$0	\$0
Three-year total: \$321,750			Three-year present value: \$292,500			

Financial Summary

Consolidated Three-Year, Risk-Adjusted Metrics

Cash Flow Chart (Risk-Adjusted)



Cash Flow Analysis (Risk-Adjusted)

	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	\$0	(\$2,421,750)	\$0	\$0	(\$2,421,750)	(\$2,201,591)
Total benefits	\$0	\$654,475	\$7,633,756	\$1,717,356	\$10,005,587	\$8,194,142
Net benefits	\$0	(\$1,767,275)	\$7,633,756	\$1,717,356	\$7,583,837	\$5,992,551
ROI						272%

Please Note

The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.

These risk-adjusted ROI, NPV, and payback period values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.

TEI Framework And Methodology

From the information provided in the interviews and survey, Forrester constructed a Total Economic Impact™ framework for those organizations considering an investment in Salesforce Professional Services.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the impact that Salesforce Professional Services can have on an organization.

Due Diligence

Interviewed Salesforce stakeholders and Forrester analysts to gather data relative to Salesforce Professional Services.

Interviews And Survey

Interviewed five decision-makers and surveyed 216 respondents at organizations using Salesforce Professional Services to obtain data about costs, benefits, and risks.

Composite Organization

Designed a composite organization based on characteristics of the interviewees' and survey respondents' organizations.

Financial Model Framework

Constructed a financial model representative of the interviews and survey using the TEI methodology and risk-adjusted the financial model based on issues and concerns of the interviewees and survey respondents.

Case Study

Employed four fundamental elements of TEI in modeling the investment impact: benefits, costs, flexibility, and risks. Given the increasing sophistication of ROI analyses related to IT investments, Forrester's TEI methodology provides a complete picture of the total economic impact of purchase decisions. Please see [Appendix A](#) for additional information on the TEI methodology.

Glossary

Total Economic Impact Approach

Benefits

Benefits represent the value the solution delivers to the business. The TEI methodology places equal weight on the measure of benefits and costs, allowing for a full examination of the solution's effect on the entire organization.

Costs

Costs comprise all expenses necessary to deliver the proposed value, or benefits, of the solution. The methodology captures implementation and ongoing costs associated with the solution.

Flexibility

Flexibility represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. The ability to capture that benefit has a PV that can be estimated.

Risks

Risks measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on "triangular distribution."

Financial Terminology

Present value (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feeds into the total NPV of cash flows.

Net present value (NPV)

The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made unless other projects have higher NPVs.

Return on investment (ROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.

Discount rate

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.

Payback

The break-even point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

Appendixes

APPENDIX A

Total Economic Impact

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

APPENDIX B

Survey Demographics

ROLE	
Manager	42%
Director	32%
Vice president	19%
C-level executive	7%

RESPONSIBILITY	
I influence decisions related to my organization's CRM strategy/tech.	45%
I am part of a team making decisions for my organization's CRM strategy/tech.	32%
I am the final decision-maker for my organization's CRM strategy/tech.	22%

*Percentages do not add up to 100% due to rounding

REGION	
EMEA	28%
APAC	25%
LATAM	24%
NA (North America)	23%

INDUSTRY	
Technology	13%
Financial services	13%
Manufacturing and automotive	11%
Retail and consumer goods	10%
Consumer and business services	9%
Energy and utilities	9%
Transportation and logistics	9%
Healthcare and life sciences	8%
Travel and hospitality	7%
Communication and media	6%
Public sector	5%

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EMPLOYEES

1,000 to 4,999 employees	42%
5,000 to 19,999 employees	42%
20,000 to 50,000 employees	12%
>50,000 employees	4%

ANNUAL REVENUE

\$250M to less than \$500M	5%
\$500M to less than \$1B	38%
\$1B to less than \$10B	49%
\$10B to less than \$25B	5%
\$25B to less than \$50B	2%
\$50B to \$100B	1%
More than \$100B	0.5%

*Percentages do not add up to 100% due to rounding

APPENDIX C

Endnotes

¹ Source: [The Future of CRM](#), Forrester Research, Inc., June 6, 2023; [AI Impact On CRM Operations](#), Forrester Research, Inc., April 10, 2025; [The Salesforce Consulting Services Landscape, Q1 2023](#), Forrester Research, Inc., February 1, 2023.

² Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

³ This information in this callout is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question "How much do you agree with the following statements related to how Salesforce Professional Services helped your organization build a more flexible platform foundation?" Of these respondents, 68% selected either "strongly agree" or "agree" for the answer option "positioned our organization to more quickly adopt Salesforce AI capabilities (e.g. Einstein, Agentforce) in the future."

⁴ This information in this callout is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question "Do you anticipate that the benefits to your organization created by your investment in Salesforce Professional Services will be greater than the costs (e.g., a positive ROI)?" Of these respondents, 90% selected "yes."

⁵ The information in these bullets is based on both customer interview evidence and a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question "What was your Salesforce environment before your organization's engagement with Salesforce Professional Services? (Select all that apply.)" Of these respondents, 52% selected "We had several instances of the Salesforce platform that we needed to consolidate and rationalize"; 47% selected "We had an existing Salesforce implementation but needed support to deploy a new product or capability"; 41% selected "We were brand new to the Salesforce platform and needed help with initial implementation"; 31% selected "We had previously attempted an implementation with a consulting partner, but efforts failed"; and 23% selected "We had previously attempted a Salesforce implementation on our own, but efforts failed."

⁶ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question "What were some of the key factors or pain points that drove your organization to engage with Salesforce Professional Services? (Select all that apply.)" Of these respondents, 60% selected "We were not getting expected/full value from the existing deployment."

⁷ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question "What were some of the key factors or pain points that drove your organization to engage with Salesforce Professional Services? (Select all that apply.)" Of these respondents, 49% selected "We lacked internal expertise or bandwidth to execute the implementation or project successfully."

⁸ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question "What percentage of your Salesforce implementation was customized (using custom code instead of the box features) before and after Salesforce Professional Services?" On average, respondents reported 42% for the answer option "customization before engaging with Salesforce Professional Services."

⁹ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question "Why did your organization engage professional services directly from Salesforce? (Select all that apply.)" Of these respondents, 66% selected "Salesforce provided a clearer path to self-sufficiency."

¹⁰ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question "Why did your organization engage professional services directly from Salesforce? (Select all that apply.)" Of these respondents, 44% selected "We wanted to improve end-to-end accountability for project success."

¹¹ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question "How much do you agree with the following statements regarding time to value and implementation timelines and costs?" Of these respondents, 72% selected "strongly agree" or "agree" for the answer option "Salesforce Professional Services reduced overall time required for the implementation or project." These respondents were asked a follow-up question: "You noted that Salesforce Professional Services reduced overall time required for the implementation or project. Using your best estimate, how many weeks do you feel your organization has saved in the overall time required for the implementation or project by engaging with Salesforce Professional Services?" Forrester calculated the average time savings using the estimates from the respondents who agreed or strongly agreed, then weighted these results across the full survey population, including those who did not agree. This produced a weighted average time savings of 4.4 months.

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¹² The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question “How much do you agree with the following statements regarding time to value and implementation timelines and costs?” Of these respondents, 83% selected “strongly agree” or “agree” for the answer option “Salesforce Professional Services reduced time to MVP.” These respondents were asked a follow-up question: “You noted that Salesforce Professional Services reduced overall time to minimum viable product (MVP). Using your best estimate, how many weeks do you feel your organization has saved in time to MVP by engaging with Salesforce Professional Services?” Forrester calculated the average time savings using the estimates from the respondents who agreed or strongly agreed, then weighted these results across the full survey population, including those who did not agree. This produced a weighted average of 11.7 weeks, which is rounded up to three months.

¹³ Source: “The Total Economic Impact™ Of Salesforce B2B Commerce,” a commissioned study conducted by Forrester Consulting on behalf of Salesforce, May 2024; Source: “The Total Economic Impact™ Of Salesforce Service Cloud,” a commissioned study conducted by Forrester Consulting on behalf of Salesforce, February 2024; Source: “The Total Economic Impact™ Of Salesforce Marketing Cloud” a commissioned study conducted by Forrester Consulting on behalf of Salesforce, January 2023.

¹⁴ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question “How much did engaging Salesforce Professional Services reduce the risk of project failure compared to using other implementation approaches?” In the context of project failure, we mean that the project does not meet its original objectives, including effectively addressing business goals, achieving expected functionality, and/or driving expected user adoption. Failure can also include poor system performance, low stakeholder satisfaction, or the need for significant rework. A score of 100% means that Salesforce Professional Services completely eliminated the risk of failure, and 1% means it had minimal impact, at an average of 51%.

¹⁵ Source: “The Total Economic Impact™ Of Salesforce B2B Commerce,” a commissioned study conducted by Forrester Consulting on behalf of Salesforce, May 2024; Source: “The Total Economic Impact™ Of Salesforce Service Cloud,” a commissioned study conducted by Forrester Consulting on behalf of Salesforce, February 2024; Source: “The Total Economic Impact™ Of Salesforce Marketing Cloud” a commissioned study conducted by Forrester Consulting on behalf of Salesforce, January 2023.

¹⁶ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question “How much do you agree with the following statements related to how Salesforce Professional Services helped your organization build a more flexible platform foundation?” Of these respondents, 85% selected “strongly agree” or “agree” for the answer option “helped our organization adopt new Salesforce releases sooner.” These respondents were asked a follow-up question: “You noted that Salesforce Professional Services helped your organization adopt new Salesforce releases sooner. What was the average time it took to adopt a new Salesforce release before and after your engagement with Salesforce Professional Services?” The average time to adopt a new release was 26% faster after engaging Salesforce Professional Services than before.

¹⁷ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question “How much do you agree with the following statements related to how Salesforce Professional Services helped your organization build a more flexible platform foundation?” Of these respondents, 74% selected “strongly agree” or “agree” for the answer option “architected using out-of-the-box and configuration over customization.” The entire survey population was also asked “What percentage of your Salesforce implementation was customized (using custom code instead of the box features) before and after Salesforce Professional Services?” On average, survey respondents reported 42.4% for the answer option “customization before engaging with Salesforce Professional Services” and 32.8% for the answer option “customization after engaging with Salesforce Professional Services.”

¹⁸ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question “How much do you agree with the following statements related to self-sufficiency and long-term success?” Of these respondents, 86% selected “strongly agree” or “agree” for the answer option “Salesforce Professional Services reduced long-term operations/management costs.”

¹⁹ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question “How much do you agree with the following statements related to how Salesforce Professional Services helped your organization build a more flexible platform foundation?” Of these respondents, 63% selected “strongly agree” or “agree” for the answer option “Salesforce Professional Services reduced technical debt.”

²⁰ The information in this paragraph is based on a survey follow-up question directed to the 136 decision-makers with responsibility for CRM who indicated that their organizations reduced technical debt: “You noted that engaging with Salesforce Professional Services helped your organization reduce technical debt. How much do you agree with the following statements?” Of these respondents, 91% selected “strongly agree” or “agree” for the answer option “Salesforce Professional Services reduced rework and/or refactoring of code.” Factoring in respondents who did not agree that their organizations reduced technical debt, Forrester concluded that over half of the survey respondents reported a

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reduced need for rework and refactoring of code as a result of their engagement with Salesforce Professional Services. Additionally, 123 survey respondents reported an average reduction of 49% when responding to the question “You noted that engaging with Salesforce Professional Services helped your organization reduce rework and/or refactoring of code. How have your organization’s rework and/or refactoring costs changed by engaging with Salesforce Professional Services?” — leading to a weighted average of 28%.

²¹ The information in this paragraph is based on several survey questions: 1) Of the 216 IT and business decision-makers with responsibility for CRM who were surveyed, 50% selected the answer option “Enabled our organization to realize more value from the overall Salesforce investment” when asked the question “Which of the following benefits has your organization realized as a result of its investment in Salesforce Professional Services? (Select all that apply.)” In a follow-up question, these respondents shared an 8.5x average when responding to the question “You said that Salesforce Professional Services enabled your organization to realize more value from the overall Salesforce investment. Please estimate how much more ROI your organization has realized.” 2) Of the 216 IT and business decision-makers with responsibility for CRM who were surveyed, 86% selected “strongly agree” or “agree” for the answer option “Improved employee productivity and user experience” in response to the question “How much do you agree with the following statements regarding business impacts and user adoption resulting from your engagement with Salesforce Professional Services?” Forrester calculated a weighted average of 2.3 hours based on the follow-up question “You noted that engaging with Salesforce Professional Services helped increase employee productivity. How much time on average do you think the Salesforce end user saves per week as a result of your organization’s engagement with Salesforce Professional Services (e.g., as a result of more efficient process design, activation of high impact features, high quality training, etc.)?” 3) Of the 216 IT and business decision-makers with responsibility for CRM who were surveyed, 84% selected “strongly agree” or “agree” for the answer option “improved customer experience” in response to the question “How much do you agree with the following statements regarding business impacts and user adoption resulting from your engagement with Salesforce Professional Services?”

²² The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked the question “How much do you agree with the following statements related to self-sufficiency and long-term success?” Of these respondents, 71% selected “strongly agree” or “agree” for the answer option “Salesforce Professional Services shared Salesforce best practices”; 54% selected “strongly agree” or “agree” for the answer option “Salesforce Professional Services helped establish a Salesforce Center of Excellence”; and 59% selected “strongly agree” or “agree” for the answer option “Salesforce Professional Services helped establish a Salesforce operating model and governance structure.”

²³ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM. Of these respondents, 73% responded selected “strongly agree” or “agree” for the answer option “Salesforce Professional Services helped improve risk mitigation and security” in response to the question “How much do you agree with the following statements related to how Salesforce Professional Services helped your organization build a more flexible platform foundation?” Additionally, 56% of respondents selected “creating/maturing our data strategy” and “building comprehensive data architecture and integration strategies” in response to the question “What areas of support did Salesforce Professional Services provide to your organization? (select all that apply).”

²⁴ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked “What are your company’s plans when it comes to implementing AI solutions?” Of these respondents, a combined 60% selected “implemented but not expanding or upgrading” or “expanding or upgrading implementation” and 28% selected “planning to implement in the next 12 months.” Additionally, 68% of survey respondents selected “strongly agree” or “agree” for the answer option “positioned our organization to more quickly adopt Salesforce AI capabilities (e.g. Einstein, Agentforce) in the future” in response to the question “How much do you agree with the following statements related to how Salesforce Professional Services helped your organization build a more flexible platform foundation?”

²⁵ The information in this paragraph is based on a survey of 216 IT and business decision-makers with responsibility for CRM who were asked “What were the most significant upfront internal costs your organization incurred as a part of its Salesforce engagement? (Select all that apply.)” Of these respondents, 61% selected “time for project management.”

Disclosures

Readers should be aware of the following:

This study is commissioned by Salesforce and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in Salesforce Professional Services. For any interactive functionality, the intent is for the questions to solicit inputs specific to a prospect’s business. Forrester believes that this analysis is representative of what companies may achieve with Salesforce Professional Services based on the inputs provided and any assumptions made. Forrester does not endorse Salesforce or its offerings. Although great care has been taken to ensure the accuracy and completeness of this model, Salesforce and Forrester Research are unable to accept any legal responsibility for any actions taken on the basis of the information contained herein. The interactive tool is provided “as is,” and Forrester and Salesforce make no warranties of any kind.

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Salesforce reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

Salesforce provided the customer names for the interviews but did not participate in the interviews.

Forrester fielded the double-blind survey using a third-party survey partner.

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