



Everest Group B2B Sales Services PEAK Matrix® Assessment 2025

Focus on HCLTech

December 2025



Introduction

The outsourced sales landscape is evolving rapidly, driven by AI, rising buyer expectations, and pressure to demonstrate RoI. What was once a fragmented toolset has become a connected system spanning forecasting, lead capture, customer data, analytics, and sales support. A notable next step in this evolution is the rise of agentic AI systems that not only analyze but also execute multi-step tasks, such as prospecting, qualification, follow-ups, personalized outreach, and CRM updates, enabling providers to pair human judgment with autonomous agents. At the same time, regulatory changes and stricter privacy standards are pushing providers to focus on data quality, consent, and transparent practices.

Pipeline creation remains the core engine of growth, but the approach has shifted from high-volume outreach to more precise, signal-driven engagement. Lead generation, qualification, nurturing, and outbound execution are being refined with intent data, shared qualification frameworks, and compliance-first practices. Many providers are also adopting revenue operations models that connect sales, marketing, and customer success, ensuring stronger alignment and better long-term outcomes.

Digital commerce and marketplaces are extending these motions by turning interest into purchase across websites, marketplaces, and social platforms. The differentiator is the ability to deliver a seamless, trusted experience across channels, where consistency in product information, service policies, and payment

options reduces friction and builds confidence. Subscriptions, social selling, and cloud marketplaces are expanding as growth channels, offering new ways for businesses to engage and transact. Providers that combine automation with human oversight, embed compliance, and deliver clear results are the best-positioned to thrive in this next phase of outsourced sales.

The full report includes the profiles of 24 sales services providers featured on the B2B Sales Services PEAK Matrix® and 14 providers on the B2C Sales Services PEAK Matrix®.

B2B Sales Services PEAK Matrix® 2025

- **Leaders:** Cognizant, Concentrix, HCLTech, Infosys, MarketSource, MarketStar, and TP
- **Major Contenders:** CIENCE, CPM International, Etech, Martal Group, memoryBlue, MCI, Probe Group, TaskUs, TELUS Digital, TMJ, and TTEC
- **Aspirants:** Acquirent, Marconix, Pentafon, Sales Focus, Sales Partnerships, and SalesRoads

B2C Sales Services PEAK Matrix® 2025

- **Leaders:** TP, Konecta, and MarketSource
- **Major Contenders:** Cognizant, CPM International, Etech, HCLTech, Probe Group, TaskUs, TELUS Digital, TTEC, and VXI
- **Aspirants:** MCI and TMJ

Scope of this report

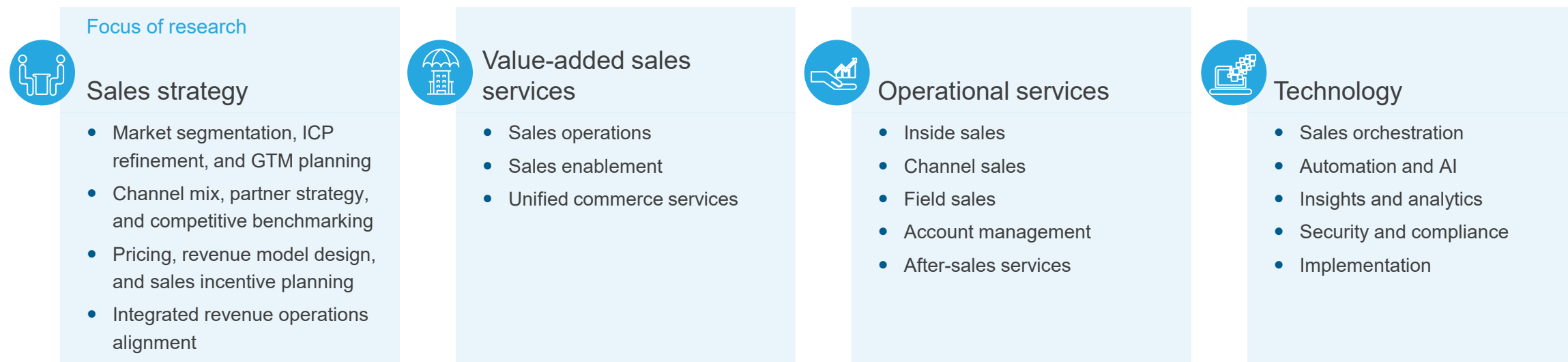
Geography: global

Industry: all

Products: sales services

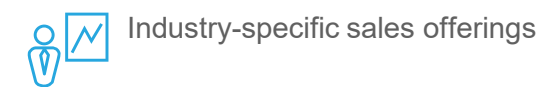
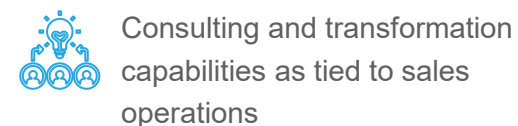
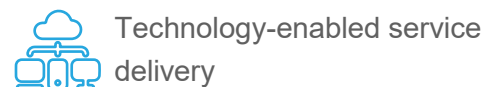
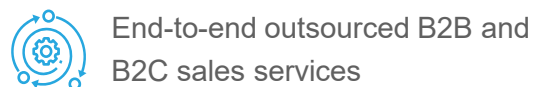
Scope of the evaluation

The evaluation spans all these layers, assessing provider maturity and capabilities across strategy, operations, and value-added layers, and enabling technology integration

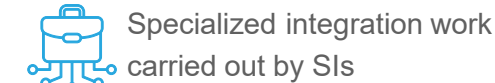
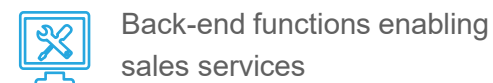
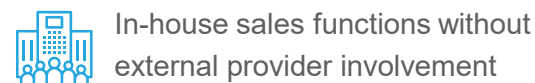
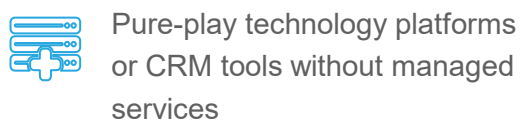


Scope boundaries

Included in scope:



Excluded from scope:



Sales services PEAK Matrix® characteristics

Leaders

B2B Sales Services PEAK Matrix®: Cognizant, Concentrix, HCLTech, Infosys, MarketSource, MarketStar, and TP

B2C Sales Services PEAK Matrix®: Konecta, MarketSource, and TP

- Leaders operate at significant scale across B2B and B2C sales services, delivering end-to-end suite of solutions. They further differentiate themselves through strong advisory capabilities, robust sales strategy offerings, and targeted acquisitions that expand their capabilities and market reach
- Leaders have built a strong and balanced delivery portfolio, with a significant presence in all major geographies and a workforce that is adept in multiple languages
- They deliver best-in-class sales solutions by leveraging a blend of proprietary investments and strategic partnerships, driving advances in capabilities such as sales enablement, conversational AI, and lead management
- Providers stand out through a forward-looking vision that emphasizes investments in agentic AI, gen AI, and automation, complemented by innovative delivery models and next-generation commercial constructs

Major Contenders

B2B Sales Services PEAK Matrix®: CIENCE, CPM International, Etech, Martal Group, memoryBlue, MCI, Probe Group, TaskUs, TELUS Digital, TMJ, and TTEC

B2C Sales Services PEAK Matrix®: Cognizant, CPM International, HCLTech, Etech, Probe Group, TaskUs, TELUS Digital, TTEC, and VXI

- Major Contenders demonstrate selective strengths across different parts of the B2B and B2C sales services value chain, while actively pursuing both organic and inorganic investments to close portfolio gaps
- They are building capabilities to serve different geographies and industry segments, while specializing in a few regions and verticals
- Providers are investing in emerging technologies such as gen AI, Intelligent Virtual Assistants (IVA), and Robotic Process Automation (RPA) to enhance efficiency and differentiation

Aspirants

B2B Sales Services PEAK Matrix®: Acquirent, Marconix Sales Solutions, Pentafon, Sales Focus, Sales Partnerships, and SalesRoads

B2C Sales Services PEAK Matrix®: MCI and TMJ

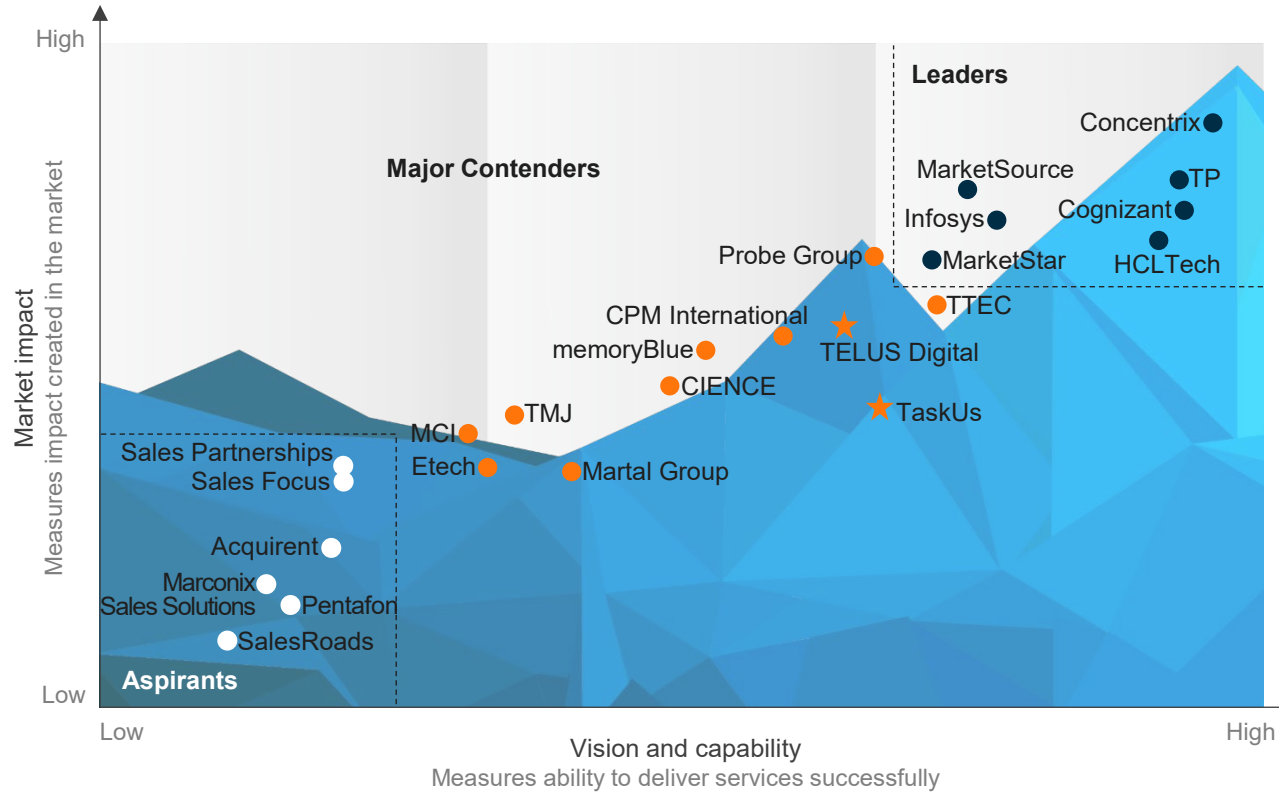
- Aspirants, with their limited scale of operations across B2B/B2C sales services, are focused on niche geographies, industries, or buyers, and have delivery capabilities in limited locations
- Providers are expanding into new geographies and industries while advancing digital and AI solutions, including gen AI-powered chatbots and agent-assist tools, and are now pivoting toward building AI agents and agentic AI capabilities tailored for sales

Everest Group PEAK Matrix®

B2B Sales Services PEAK Matrix® Assessment 2025 | HCLTech is positioned as a Leader

Everest Group B2B Sales Services PEAK Matrix® Assessment 2025¹

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers












¹ Assessments for Acquirent, CIENCE, CPM international, MarketSource, Marconix Sales Solutions, MCI, memoryBlue, Sales Focus, Sales Partnerships, Martal Group, and SalesRoads exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2025)

HCLTech (page 1 of 2)

Everest Group B2B sales services assessment – Leader

Measure of capability:  Low  High

	Market impact				Vision and capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
B2B									










Strengths

- With a network of over 7,000 agents dedicated to supporting B2B and B2C sales services, HCLTech primarily serves clients in the US and Canada, UKI, Continental Europe, and APAC region spanning multiple industries including telecom and media, technology, and retail for B2B sales services, and BFSI, retail, CPG, and healthcare for B2C sales services
- It offers a wide range of services including inside sales services such as lead management and campaign management; sales enablement services such as deal and pursuit support, sales strategy, sales operations, and contract management; account and relationship management services; as well as unified commerce services
- It has developed a robust suite of proprietary solutions, including iLeadSense for gen AI-driven lead profiling, XITForce for data migration, iEmail for gen AI-driven email automation, Partner Prime for account management and brand collaboration, iKnow for gen AI-driven knowledge management, Power SalesToolbelt for mobile sales access, iGenie for context-aware virtual assistant support, and InFusion e-commerce for a cost-effective B2C experience
- It leverages AI agents across the sales life cycle, leveraging them for market segmentation, guided selling, proposal creation, account engagement, and post-sales support
- It has established a partnership ecosystem with providers such as Verloop and Kore.ai for its conversational AI abilities, Workato for sales process automation, High Radius for end-to-end Order-to-Cash (O2C) platform, Sirion labs for contract management and customer onboarding, Amazon and Genesys for contact center optimization and AI-powered omnichannel platform, and Microsoft and Google Cloud for cloud-based solutions, advanced analytics, and gen AI and agentic AI-driven solutions
- HCLTech engages in commercial partnerships using different pricing models, with a significant number of its clients adopting outcome-based and hybrid pricing structures, highlighting its capability to undertake risk-based collaborative arrangements
- It leverages agentic AI across the sales life cycle with agents supporting market segmentation and competitive intelligence, guided selling and adaptive training, personalized prospect outreach, sales process optimization, upsell/cross-sell identification, and issue resolution
- It has an extensive delivery network across multiple locations such as India, the Philippines, the US, Portugal, Poland, Bulgaria, and Romania, and offers multilingual support in languages such as English, Spanish, French, German, Italian, and Portuguese

HCLTech (page 2 of 2)

Everest Group B2B sales services assessment – Leader

Measure of capability:  Low  High

	Market impact				Vision and capability				
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B2B									

Limitations

- HCLTech has limited experience in serving B2B sales clients across BFSI, CPG, travel and hospitality, and manufacturing verticals. Its ability to support telecom and media, technology, travel and hospitality, and manufacturing verticals for B2C sales services remains unexplored
- A significant portion of HCLTech's revenue is derived from large buyers, with limited experience in serving small and midsize buyer segments

Market trends

Outsourced sales services are gaining momentum as enterprises seek scalable, tech-enabled growth solutions, but sustaining customer trust, talent stability, and integration maturity will define long-term success

Market size and growth

- The outsourced sales services market grew by an estimated 9–11% in 2023-24, reaching US\$15.6-16.1 billion, underscoring sustained demand momentum
- As sales cycles become more complex and increasingly digital-first, enterprises are leveraging outsourcing not only for cost savings but also as a strategic lever to scale inside sales, streamline operations, and ensure consistency across channels
- Providers that combine scalable delivery, technology enablement, and data-driven insights are uniquely positioned to capture this growth by helping enterprises unlock higher productivity and revenue impact

Key drivers for outsourced sales services

Cost optimization	Enterprises are under increasing pressure to grow sales while managing costs. Outsourcing provides access to trained sales talent and modern tech platforms without the high fixed costs of building and maintaining in-house teams.
Complexity of sales engagement	With buying journeys becoming more digital, multi-channel, and data-driven, enterprises seek partners that can manage complexity at scale.
Accelerating digital engagement capabilities	Modern buyers demand instant, digital-first engagement through channels such as email, chat, video demonstrations, and self-service portals, and outsourcing offers access to tech stacks without significant investments.
Flexibility and scalability	Building inside sales teams involves lengthy recruitment, training, management overhead, and software licensing; all of which slow down execution and inflate cost. Outsourcing offers a cleaner, plug-and-play alternative.

Key challenges

Brand ownership and strategic account management	Outsourced sales services create concerns around diminished control of customer interactions. Inconsistent messaging or diluted brand alignment can weaken trust and reduce long-term relationship value.
Talent churn and skill depth	High turnover in sales roles disrupts continuity and undermines the accumulation of domain expertise. Frequent replacement cycles increase costs and contribute to variability in performance delivery.
Technology integration and Rol proof	Fragmented client technology environments complicate integration and hinder clear measurement of outcomes. Ambiguity in revenue attribution reduces confidence in the value delivered by outsourcing.
Data privacy, security, and compliance	Cross-border data handling and sector-specific regulations raise compliance risks. Failures in safeguarding personal information can lead to regulatory penalties and reputational damage.

Provider landscape analysis

Concentrix, Konecra, MarketSource, and TP are the largest service providers in terms of market share on a global level

[NOT EXHAUSTIVE]

Market share analysis of the providers

2025; Percentage of overall market of sales services



1 Providers are listed alphabetically within each range

Key buyer considerations

Enterprise sourcing decisions increasingly favor providers that combine rapid execution, deep domain expertise, and scalable digital delivery to accelerate and sustain value realization

Key sourcing criteria

High



Increase cost-efficiency

Enterprises want to optimize the cost of sales operations by avoiding expenses tied to permanent headcount, training, management overhead, and technology licensing, and prefer partners that can demonstrate measurable revenue impact. Outsourcing offers a leaner and more predictable cost model.



Improve sales productivity and conversion outcomes

Buyers look for providers that can directly enhance seller performance through better CRM hygiene, funnel analytics, and targeted coaching. Outsourcing helps by enabling more focused and data-driven selling.



Tailored services

Buyers increasingly prioritize partners that can tailor solutions, offer flexible commercial models, and align operating approaches with their strategic objectives, differentiating them from providers that deliver generic, commoditized services.



Rapid access to industry-aligned skill sets

Many buyers use outsourcing to tap into sales talent with specific vertical knowledge such as healthcare or technology without investing in full-time specialists, enabling them to build credible pipelines more efficiently.



Flexibility and scalability

Enterprises look for the ability to flex capacity and skill sets rapidly in response to new market opportunities, product launches, or seasonal surges. Outsourcing offers a cleaner, plug-and-play alternative.

Low

Priority

Summary analysis

Enterprises prioritize outsourced sales partners to deliver measurable revenue impact, while reducing commercial risk. Leading providers stand out by delivering domain-driven sales solutions that integrate with existing enterprise systems and offering flexible commercial models.

Clients expect customization and alignment to strategic objectives alongside the ability to scale globally, while localizing effectively with skilled talent. Buyers want sales teams equipped with industry knowledge, account insights, and tailored messaging that drive meaningful engagement.

Key takeaways for buyers

Sales services providers have evolved from being pure executional support to strategic, AI-enabled partners, embedding advanced tools in prospecting, coaching, pipeline management, and performance optimization, while expanding into sales strategy and end-to-end revenue enablement. As this landscape matures, buyers should evaluate providers not only on scale and efficiency but also on their ability to innovate and specialize.



Shifts in provider capabilities

Look for providers expanding beyond executional support to incorporate strategic elements of sales, while simultaneously developing deeper specializations that enable more sophisticated, targeted, and value-driven support for enterprises



Innovative pricing with risk-sharing models

Move beyond traditional FTE-based or volume-driven pricing and adopt innovative commercial models, such as outcome-based or risk-sharing constructs, that align incentives, tie fees to measurable business impact, and create greater accountability in outsourced sales engagements



Key innovations

Anticipate providers deploying AI-driven sales solutions, such as conversational intelligence, advanced lead management, and AI-enabled training and coaching platforms, anchored in domain expertise to elevate seller effectiveness and enhance conversion outcomes

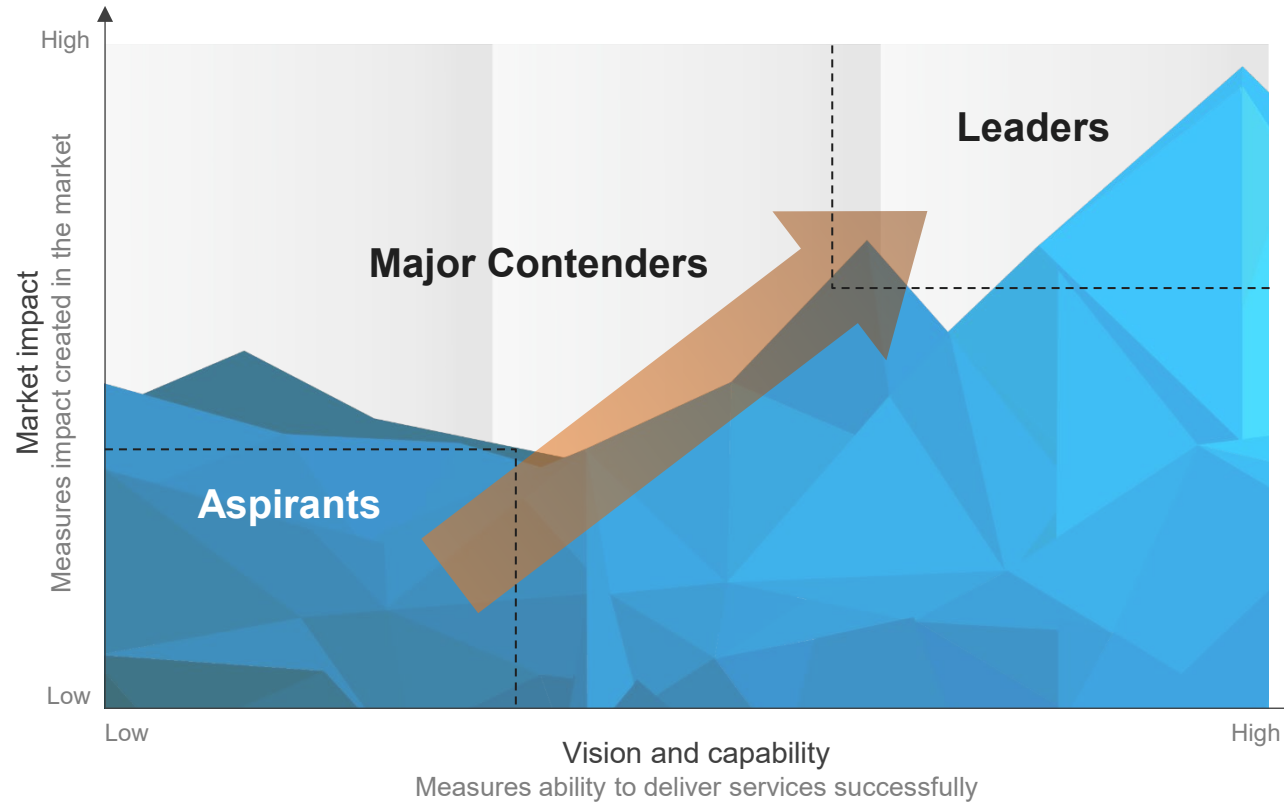
Appendix

PEAK Matrix® framework

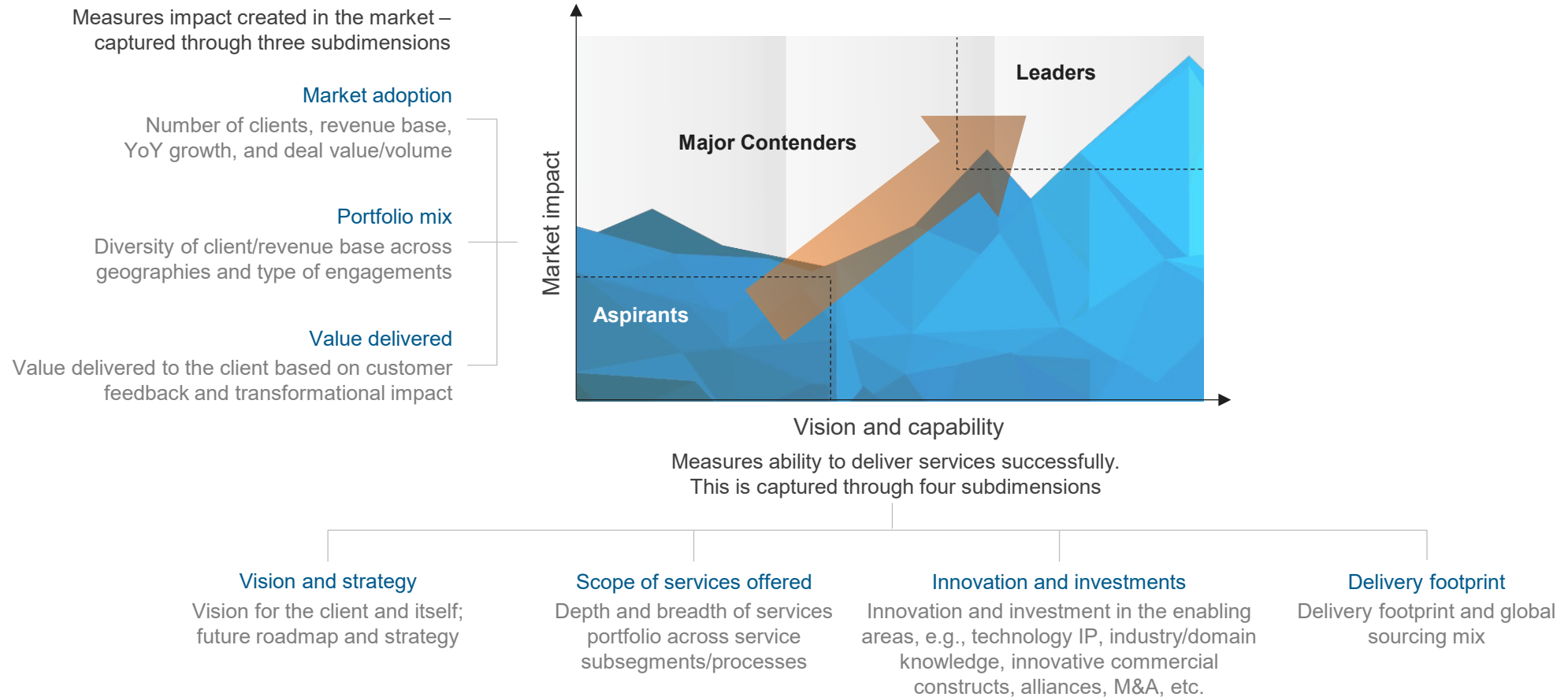
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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