

Questions to Ask When Choosing an Implementation Partner

What to ask to determine...	What you're trying to understand...
<p>Previous customer success</p> <ul style="list-style-type: none"> • What was a similar project you have worked on in the past • What were the results? • Can you provide customer references and case studies? • Describe a time when a project was not going well and how you turned it around successfully? 	<p>You want to ensure your partner has previously implemented the Salesforce products that you are purchasing — and if they haven't done this before, understand how are they planning to mitigate any risks along the way</p>
<p>Technical skills</p> <ul style="list-style-type: none"> • What technical skills and certifications can your team bring to this project? 	<p>Does your partner know how to use out-of-the-box configurations or create a custom configuration to address your needs? Your partner should be able to make the product work for your specific business goals and objectives.</p>
<p>Project management competency</p> <ul style="list-style-type: none"> • Has the partner outlined a project management approach? • Will they provide a blueprint pre-and post-build? • Do they have a dedicated project manager? • Do they have a process for handling scope changes? • How do they plan to balance project focus vs strategic focus? 	<p>How well thought-out are the partner's implementation strategy and approach, and does it address your technical environment? Does their SOW reflect a strong understanding of your requirements? Have they outlined a plan to support you after initial implementation and do they understand your long-term objectives?</p>
<p>Familiarity with the industry and solution</p> <ul style="list-style-type: none"> • What past experience do you have in (my) industry? • What projects have you previously implemented in (my) industry? 	<p>You want to confirm your partner has worked in your industry before and knows how to implement the solution to work for you!</p>
<p>Presence and availability of resources</p> <ul style="list-style-type: none"> • Will your team and resources be available in-person, virtually, or both? 	<p>Where is your partner located? Are there any travel expenses to consider in order to bring their resources on-site?</p>
<p>Familiarity with your company</p> <ul style="list-style-type: none"> • Have you worked with us before? • What do you know about our business? 	<p>Does your partner understand the business areas that will be impacted by this implementation? Can other stakeholders from your company vouch for this partner? Most importantly, has the partner taken the time to understand your technical environment and problems?</p>
<p>Culture compatibility</p> <ul style="list-style-type: none"> • Describe for me your company culture? 	<p>Does your partner share your values and work culture? Will they work effectively with your team?</p>
<p>Ability to transform the business</p> <ul style="list-style-type: none"> • What has your team done to successfully help other customers with similar goals? • What challenges do you anticipate in this project? • How were you able to overcome these challenges in the past? 	<p>You want to ensure your partner understands the ultimate business value outcome of the project, how it will impact people and processes within and outside your organization, and how to make the technology work to drive that transformation.</p>
<p>Ability to deliver training</p> <ul style="list-style-type: none"> • What training can you offer our admins? • What training can you offer our users? 	<p>What is your partner's approach to training? Does it match your organization's training requirements? What challenges or risks do they anticipate during training?</p>
<p>Delivery style</p> <ul style="list-style-type: none"> • What methodology do you typically use to deliver? 	<p>What are the timelines and phases to expect from their delivery model?</p>
<p>Level of resource competency and availability</p> <ul style="list-style-type: none"> • How long does it typically take to assemble a team for this type of project? • To what extent will resources be certified? • How confident are you that these resources will see the project to completion? • What experience do these resources have with similar projects in the past? 	<p>You want to confirm that the partner will commit experienced, certified Salesforce consultants to your project. You also want to confirm that the resource assembly time fits within your overall timeline goals.</p>
<p>What partners expect from your side</p> <ul style="list-style-type: none"> • What resources will you need from our company? • What time commitment will you need from our staff? • To what extent will you need to consult my subject matter experts (SME) over the course of this project? 	<p>Do you have a mutual understanding of the resources, time, and expertise required from both sides?</p>