

# Tools to help you evaluate the right **Salesforce** partner



# Introduction

High-Growth companies experience a time when they're growing so fast it's difficult for the tech stack, processes, and people to keep up. This aggressive growth is challenging for even the most veteran RevOps leader.

What can you do when you're in this situation?

What actions can you take to course-correct and set your team up to maintain this explosive growth?



# When you realize growth is accelerating and your team can't keep up, **you have two options.**

You can keep doing what you've always done or acknowledge it's time for a change.

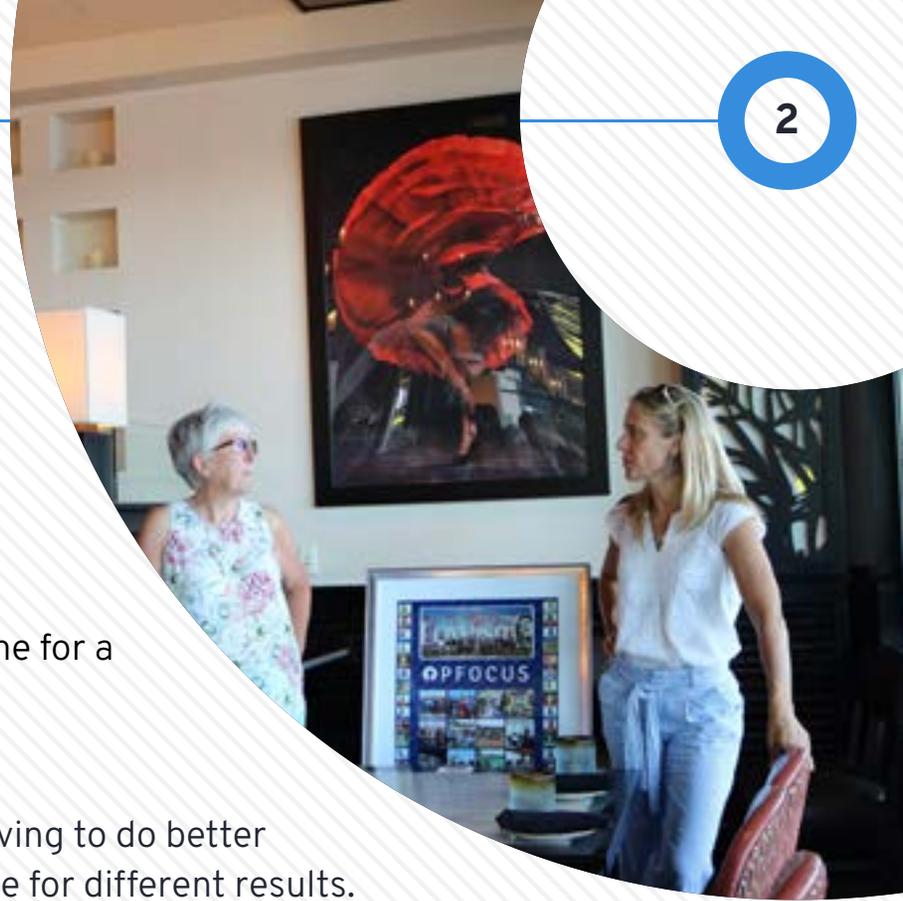
## **Option 1: Stay your course and hope for the best**

Keep doing what you're doing, looking a few months ahead, and striving to do better each time. Simply put, keep doing what you've always done and hope for different results.

## **Option 2: Acknowledge you need some help**

You are done hoping for things to get better. You're ready to bring in help outside help from consultants who've worked with teams like yours to sustain your high growth rate.

If the latter is right for your team, this guide is for you. With this unbiased guide, you'll discover what a Salesforce partner is, what they provide, and how you know you've found the right partner for you.



# Table of Contents

## 04 What is a Salesforce Growth Partner?

05 What's the difference between a Salesforce Growth Partner and a Salesforce Order Taker?

06 How much support do I need from a Salesforce Partner?

## 07 How do I pick a Salesforce Growth Partner?

08 Topics you should ask your Salesforce Growth Partner

09 Topics your Salesforce Growth Partner should ask you

## 10 How do you know when you've found the right Salesforce partner?

11 Signs you're Evaluating the Wrong Partner

12 Signs you're Considering the Right Partner

13 Your Options to Pick the Right Partner for Your Team

# What is a **Salesforce Growth Partner?**

A Salesforce growth partner is a guide that works with you to address roadblocks holding your team back from growth. They have the expertise to evaluate your current state, identify issues, and help reach your desired end state, typically focusing on marketing, sales, and customer success operations teams, streamlining processes, and providing additional bandwidth.



# What's the difference between a **Salesforce Growth Partner** and a **Salesforce Order Taker**?

Where Salesforce order takers offer additional bandwidth for your Salesforce configuration and development needs, a Salesforce growth partner provides an additional layer of proactive consultation and an investment in your growth objectives.

Below are four distinct differences that set Salesforce growth partners apart from a traditional Salesforce order taker:

**Forward Thinking Consultation**  
Salesforce growth partners look beyond your immediate needs, thinking about your growth objectives 1 to 3 years down the road.

**Direct Access to Experts**  
As part of your partnership, Salesforce growth partners provide a direct line to the consultants working on your initiatives.

**Local vs. Offshore Resources**  
Salesforce growth partners are traditionally local, where Salesforce order takers outsource resources abroad to reduce resource costs.

**Practitioners with Industry Experience**  
Salesforce growth partners offer prescriptive advice and push back on the best strategy to elevate your team.

**Application of Best Practices**  
Salesforce growth partners work with your team, teaching you the best practices that they will apply to future projects.

# How much support do I need from a **Salesforce Partner**?

Although a Salesforce growth partner may be the right fit for two similar companies, each company may require different levels of support. Determining this level of support involves looking at several factors. Below you'll find a few elements of what partners typically look at when determining how much support is appropriate for reaching your growth goal.

## Current State

Consider the following factors...

**Processes** - The type of and complexity of processes your team currently has

**Data Quality** - The amount of outdated or duplicate data in your system

**Tech Stack** - The number of and integration between platforms

## Your Team

What level of expertise do you have in-house and where do you require additional bandwidth?

## Timeline

How quickly do you plan to reach your desired end state?

## Future State Target

How ambitious are your long-term goals and what level of growth are you aiming to achieve?

# How do I pick a Salesforce Growth Partner?

Once you've determined a Salesforce growth partnership is the right fit for your team, it's time to select a team to work with. When selecting a partner, there are a few areas you should focus on.

## 01 Am I really looking for a partner?

Some companies are only looking for order takers. A Salesforce growth partner is prescriptive and works with.

## 02 What does this Salesforce partner specialize in?

Almost every RevOps partner has a type of industry or a particular set of problems they excel at servicing. OpFocus, for example, specializes in working with investor-backed, high-growth SaaS companies.

## 03 What growth levers are driving my initiatives?

Bring together your internal stakeholders and discuss your desired end state. Knowing where these issues exist will help you select a partner with relevant experience.

## 04 Do I like this partner's team?

You'll spend a lot of time with the Salesforce team you select. It's important you take the time and ensure you're comfortable working with them.



# Topics you should ask your Salesforce Growth Partner

## My Project:

- Will members of my project team have RevOps practitioner experience?
- How will you challenge the way we're working with alternative perspectives or best practices? What domain expertise does your team have?
- What does your project methodology look like?
- How will you ensure our project plan is on track and that all stakeholders are aligned?
- What guarantees do you provide to ensure we accomplish what we set out to do?

## Past Projects:

- What are a few examples of companies that have sought to solve similar problems to ours? What's your NPS or customer satisfaction rating?
- What's the average length you and your clients work together?
- What percentage of your clients do more than one project with you?
- Can you provide relevant references or case studies?

## The Salesforce Partner's Team:

- Where is your team located?
- What types of architects, consultants, data experts, or developers will be available on my project team?
- Which platforms do you have certified resources for?
- How do you handle knowledge transfer from your team to our internal team?

# Topics your Salesforce Growth Partner should ask you

When speaking with a Salesforce partner, they'll ask you several questions designed to determine the type of support that best fits your team. To save time, review the common questions you'll likely hear and prepare answers in advance. Below are the top 10 questions you'll likely encounter.

1 Who needs to be on your steering committee for this engagement to be successful?

- CEO  CRO  CMO  CSO  CCO  
 CTO/CIO  CFO  OTHER

2 What is your reason for engaging with a RevOps partner?

3 Have you engaged a partner before? If so, what was your team's experience with them?

4 What are your growth goals in the next 12-18 months? What's keeping you from reaching them?

5 What are your core technologies supporting your Revenue Operations today?

6 What are the most efficient and least efficient elements of your Go-To-Market process?

7 How open to change and improvement is the organization?

8 What is your timeline for implementing change?

9 How well integrated or aligned are your key revenue-related functions? (1-5)

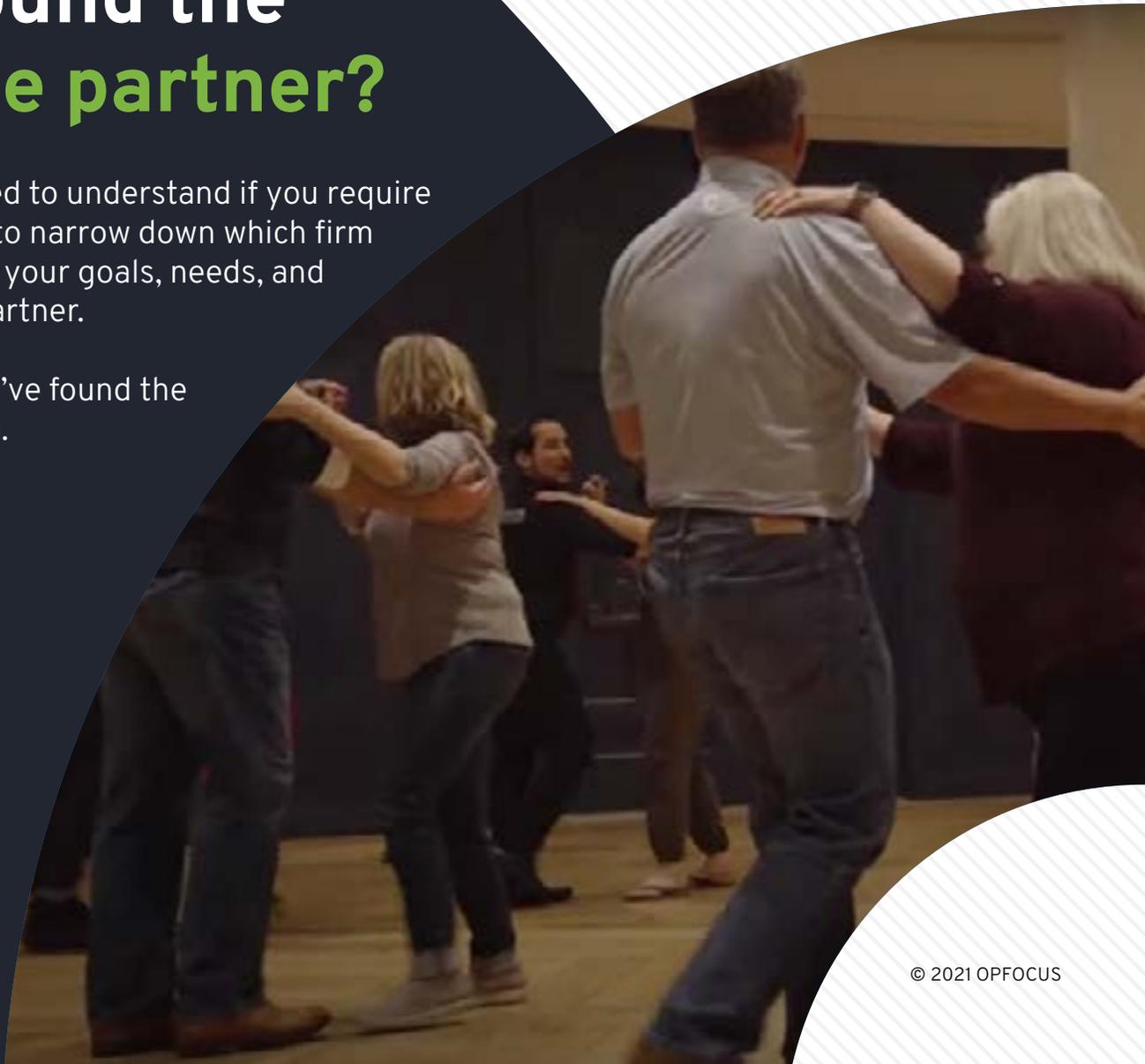
- |         |           |       |
|---------|-----------|-------|
| Product | Marketing | Sales |
| CS      | Finance   | Legal |

10 What is your level of growth readiness in terms of People, Processes, Systems, Data, and Governance?

# How do you know when you've found the right Salesforce partner?

You now have the information you need to understand if you require a Salesforce growth partner and how to narrow down which firm you'll want to engage. You've outlined your goals, needs, and the expertise you're looking for in a partner.

We'll now outline how to tell when you've found the right (or wrong) partner for your team.



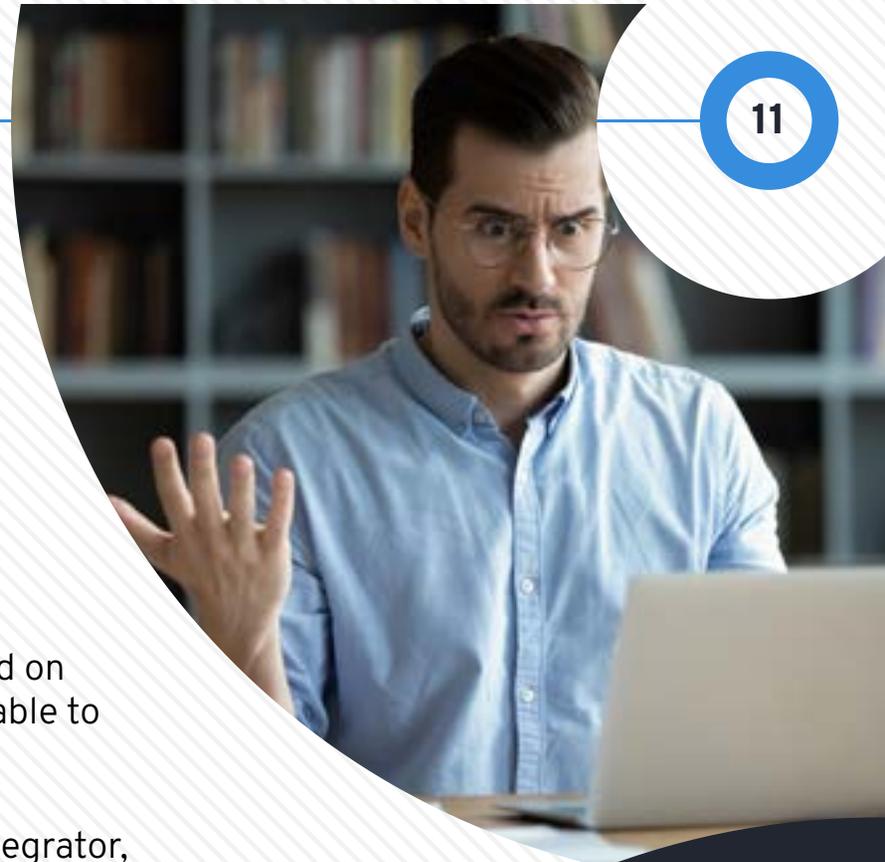
## Signs you're evaluating the **wrong partner**

You look at the consultant, and you're not confident that they can solve your entire problem.

They may provide technical support or growth consultation, but not both. Or they may not have the specific platform expertise you'll need on upcoming projects. Some firms may talk a big game, but they aren't able to consistently deliver results.

Don't worry if you've already begun work with Salesforce systems integrator, but you feel they aren't the right fit. Ask for case studies and examples of other firms they've assisted in scaling.

You deserve to have a partner who can help you with strategy & execution. Don't settle for only half of the solution.



“

**You've earned  
the right to work  
with a partner that  
can solve your  
whole problem**

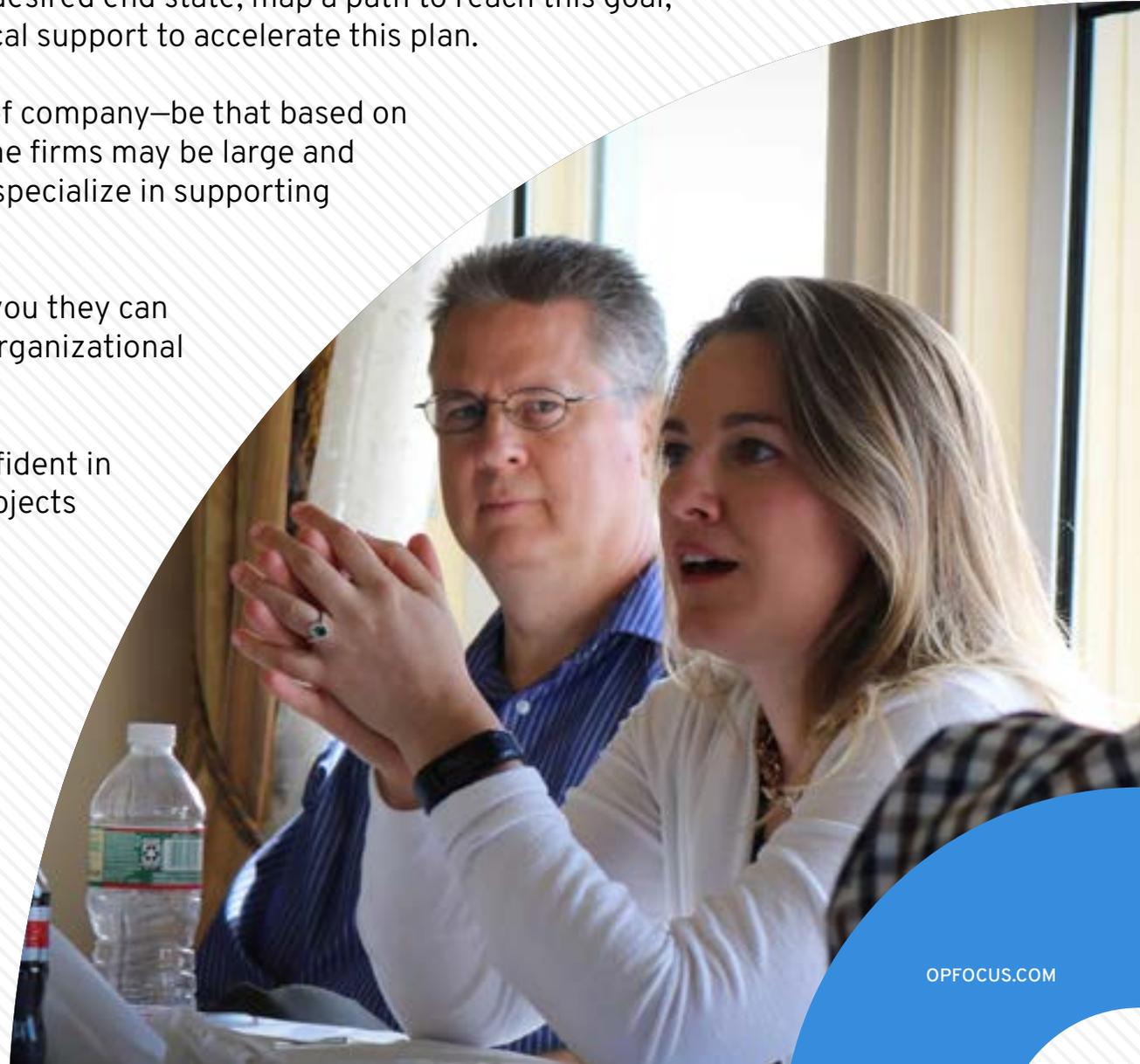
# Signs you're Considering the **Right Partner**

You're confident the firm can outline your desired end state, map a path to reach this goal, and provide project management & technical support to accelerate this plan.

They specialize in working with your type of company—be that based on your industry, size, or business model. Some firms may be large and have many case studies, but they may not specialize in supporting your organization's needs.

Ultimately, the right partner will reassure you they can meet your needs and handle the types of organizational roadblocks you're facing.

A partnership should leave you feeling confident in your future and excited to start tackling projects together.



# Your Options to Pick the Right Partner for Your Team

01

## Manage Salesforce Internally

You might conclude that none of this sounds right for your organization. The pieces are already in place, and you have the internal resources to reach the next level of growth. It's perfectly acceptable to take a step back and prioritize growth down the line.

02

## Take the Growth Readiness Assessment

If your team is still on the fence about whether you want to bring on an external partner, you'll want to do more research. Get started with this [Organizational Growth](#) Assessment to identify the high-level, cross-functional opportunities for improvement.

03

## Evaluate Salesforce Partners

After reading through this document, you're armed with a guide to begin evaluating potential partners. Once you know what you're looking for in a partner, you can create a shortlist of providers.

Each partner will have their own specialties, methodologies, templates for completing processes. Each provider should have a Buyer's Guide to show you what this entails.

Are you curious about what it's like to work with a Salesforce Growth Partner that's familiar with SaaS organizations like yours? This guide on [What to Expect with an OpFocus Operational Roadmap and Growth Services](#) will show you.



**Tools to help you  
evaluate the right  
Salesforce partner**

Your Rocket Fuel for ARR Growth

[WWW.OPFOCUS.COM](http://WWW.OPFOCUS.COM)