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SALESFORCE CONSULTANT SCREENING: THE ULTIMATE GUIDE

## 15 questions for screening a Salesforce Platform Cloud consultant

Salesforce Platform Cloud projects in particular, and CRM platform projects in general, have a wide range of requirements and practices, so you are going to need to think about “drill down” questions to ask potential consultants to determine if they're a fit for your particular situation.

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CIO |

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The Platform Cloud covers a very wide range of custom development and integration projects. Some parts of advanced Sales and Service Cloud projects include elements of the platform, so most consultancies' have reasonable levels of general experience. However, the Platform Cloud has the widest range of third-party products and add-ons, so you will need to drill down on their specific experience.

This brief set of questions is designed to help you evaluate the suitability of a Salesforce.com (SFDC) consultancy. It is not to be used as a questionnaire for the consultancy to fill out in the RFP. Instead, use the questions conversationally so you can see their flinches and know where to probe.

Since client requirements vary, there's no single "correct" set of answers to these questions. Instead, score the vendors on how closely they fit your organizational needs and corporate IT style—and no firm is going to get a perfect score (be happy if you find a “solid B+”).

### Platform Cloud experience

- What is the difference between the Salesforce APEX platform and Heroku? What kinds of applications fit best with each?
- When does the consultant recommend Heroku over AWS, Azure, or other cloud platforms? What are the “gotchas” for each platform?
- For the project you are contemplating, which cloud platform(s) is the consultant recommending?

Why?

- Which cloud platform has the consultant used in production systems? What kinds of applications were they?
- What kind of applications do not benefit from public cloud deployment? Should you be considering a private cloud or hybrid for your application?
- What languages is the consultant most comfortable with for cloud platform execution?
- What does the consultant recommend to improve debugging, error reporting, auditability, and compliance in platform projects like this one?
- What information security and regulatory compliance issues will be important to a project like this one?
- What performance issue is going to be most obvious in a project like this one? (Take points off if the consultant doesn't mention latency or responsiveness.)
- Which "cloud control panel" (to administer the apps in real time) does the consultant like best?

## Platform Cloud integration

- If you have a corporate standard for integration servers, middleware, or enterprise message buses, does the consultant have experience with it in production use?
- If you do not have a corporate standard for integration technologies (or you don't have to follow the standard), what integration product or service does the consultant recommend? Why?
- At what point in the project should the first pilot run for data integration be done? If a significant amount of data needs to be migrated as part of the integration, when and how should that migration be done?
- What tools does the consultant recommend for deduplication, reconciliation, and validation of data across systems?
- When should an outside service be used for data cleansing and enrichment?

Platform Cloud projects have the widest range of requirements and practices, so you are going to need to think about "drill down" questions for your particular situation. Make no mistake about it, Platform Cloud work is almost always custom code – and because of integration requirements, almost always involves network and data quality issues. So, schedule and cost are the real risks here – probe deeply to make sure the consultant has ways to mitigate them.

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