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## 20 Questions for Screening a Salesforce.com Consultant

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This brief set of questions is designed to help you evaluate the suitability of a [Salesforce.com](#) consultancy. 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 profile and current needs.

The good news here is that almost all of these questions can be generalized to fit most CRM platforms or cloud services and applications. For brevity's sake, we're leaving that as an exercise for the student here.

Before we get to the questions, though, there's one key issue to address, which I'll call Topic #0: Are you looking for a consultant or just a contractor? The difference is huge. A contractor will do what you ask, but will typically do *only what you ask*. A real consultant will be advising you, telling you what should be done—and then doing it alongside you.

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On to the questions. Each group is followed by explanatory text and things to watch out for in candidates' responses.

### **Salesforce.com Consultant Team Capabilities**

A consultant firm's background matters little if the people who will actually staff *your project* are inexperienced. Be sure to ask the following questions :

- Are they certified SFDC consultants?
- Do they have MBAs or more than 10 years of non-consulting business experience?
- Are they Salesforce MVPs?

Consultants love to play the bait-and-switch game. A proposal will be full of wondrous tales of experience and achievement at the firm, but no promises will be made about the individuals who will actually be on site for your project. Evaluate the specific individuals who will be involved. Generalized expertise at the firm doesn't do you much good.

### **Salesforce.com Consultant Team Experience**

You also need people on your project who have been down this road before.

- How many projects have they done that are nearly identical to yours?
- How many projects have they done that are similar to yours?

- How many projects have they delivered overall?
- How many clients have they had that are of a similar scale to your company, whether it's Fortune 100 or SMB?
- How does the team provide best practices on Salesforce—written communication, for example, or spoken reviews, or user-group leads?
- How does the team provide best practices on your business processes? Does it have business experience in your field?

This is where a consultants' expertise can set it apart from mere contractors. What you want here is valuable insight into what competitors are doing, as well as best practice across your industry. Why? Because you don't know what you don't know.

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When evaluating a consultants' domain knowledge, don't be too narrow in interpreting "your" industry. Partial credit should be given for related businesses. That said, don't overvalue experience that's too far afield.

### **Salesforce.com Consultant Client References**

Make sure your potential consultant has good references.

- How many client references did the consultant offer?
- How many clients did they claim are referencable?
- What is the firm's customer satisfaction ranking in the [Salesforce.com App Exchange](#)?

Of course, references from clients in closely related industries are king. Ask around to get past the perfectly groomed references the vendor provides. Check discussion boards, user groups and other social media outlets to find out what the buzz is on the consultants, both as individuals and as a firm.

### **Salesforce.com Consultant Vendor Focus and Depth**

It probably goes without saying, but you want a consultant who knows Salesforce.

- What percentage of the vendor's revenues are Salesforce projects?
- How long has the firm had a dedicated Salesforce practice?
- How many Salesforce systems has it deployed?
- How long has it had an Salesforce practice dedicated to your vertical industry?

There are a lot of poseurs out there advertising legions of certified consultants. Take those claims with a grain of salt. Look deeper into how serious the vendor is about its Salesforce practice. Some very large consultancies have, in fact, surprisingly small practices truly dedicated to Salesforce.

### **Salesforce.com Consultant Project Design**

Finally, you need to make sure a consultant won't let your project fall through the cracks.

- To what degree will the project depend on custom code?
- To what degree will the project use offshore resources? (It's cheaper, but *caveat emptor*.)
- Do you know exactly who will be staffing your project? Will the vendor guarantee this?
- Will the vendor subcontract part of the work to unnamed third parties?

We all love to code. Heck, I can barely stop myself. But deeply custom code should be avoided if you can. It's expensive (both initially and with ongoing maintenance), and every module of custom code further limits the flexibility of your application over time. Since one of the towering strengths of Salesforce is its platform flexibility, too much code is a seriously bad thing.

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And we all know the offshoring drill by now. There's no question that it's cheaper, but that's only in the narrow, hourly rate sense. For [Salesforce.com Secrets of Success](#)" and is the CEO of [SalesLogistix](#), a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel and India. Taber has more than 25

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