

# FROM RFP TO RESULTS:

## Crucial Questions for *Government* Salesforce Partner Selection



As a Government Organization, you want to ensure that you are asking the right questions when it comes to selecting a partner for your Salesforce projects. While the exact list of considerations will vary based on the project, there are some universal baseline requirements.

**Experience and expertise:** The partner should have a deep understanding and experience in implementing Salesforce solutions within the Public Sector. They should understand the unique needs and challenges of the sector.

*Questions*

**Has the partner successfully completed similar projects for the government in the past? And does the partner have recent/current experience doing so?**

- You want to consider prioritizing a partner that has several years of specialized experience, versus one who does a little bit of everything

**Is the scope and scale of the partner's past projects comparable to this project?**

- A partner should have demonstrated experience within a government of similar project size and scale

**Certifications:** Check the Salesforce certifications that the partner holds. Certifications are a good indicator of a partner's competence and commitment to quality.

*Questions*

**How many certifications does the partner hold? Which certifications do they hold?**

- A partner should be able to provide proof of expertise

**Does the partner have experts on their team in a wide range of fields/specialties?**

- A partner should have a highly experienced team whose day-to-day consists of ensuring the success of government projects

**Reputation and references:** Look for a partner with a positive reputation in the industry. Ask for references from previous clients, particularly those in the broader public sector and government.

*Questions*

**Can the partner provide you with glowing government references that speak to their ability to successfully complete similar work?**

- A partner should be able to connect you with a relevant reference that can talk you through their experience

**Is the partner well-known within the Salesforce community, industry and/or sector?**

- A partner should be able to demonstrate leadership within the Salesforce community

**What does the Partner's Salesforce AppExchange listing look like? Is it populated with relevant information and client reviews?**

- A reliable partner will keep their AppExchange listing up-to-date and showcase their skillsets

**Approach & Methodology:** Ensure that the partner offers a clear approach and methodology that fits with your culture and suits your needs. This is crucial for the smooth operation of Salesforce solutions as time goes on.

Questions

**What managed services support options does the partner provide?**

- A partner should provide a detailed approach to support as you work towards an ideal future state

**What is the partner's approach and methodology on training, maintenance and ensuring future-proof solutions?**

- A partner should provide an approach that is measured, effective, and proven to work

**Privacy & Security:** Ensure that any partner has advanced security protocols and policies.

Questions

**Is the partner SOC II Type 2 certified? Does the Salesforce partner host all data within North America?**

- A partner should maintain the highest levels of security possible, and demonstrate a comprehensive understanding of the proper management of sensitive government information

**Does the Salesforce partner ensure their team goes through regular background checks?**

- Security goes beyond just the data - A partner should be able to give guarantees that their team has been vetted

**Cost:** Consider the cost of the services. The cheapest option isn't always the best, but you should make sure you're getting good value for your money.

Questions

**Does the partner provide a fixed rate or do they bill by the hour?**

- You want to ensure that there are no surprises and/or hidden costs

**How does the partner manage costs and communicate during the duration of the engagement?**

- A partner should have a clear and proven communications plan to ensure updates and changes are monitored and provided to your team effectively

Choosing the right partner from the beginning will save time, money, and prevent potential problems in the future, setting your organization up for success with your Salesforce projects.



Learn more about CloudKettle's expertise in *Government* and Public Sector.

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