

penrod

SALESFORCE GUIDE

THE 8 THINGS TO LOOK FOR IN A SALESFORCE CONSULTANT

Tips from a Salesforce expert navigator.





REACH FOR THE CLOUDS.

IF YOU'RE READING THIS, CHANCES ARE YOU CHOSE SALESFORCE.

Great choice! Salesforce is the premier platform to streamline your business operations and power growth. True, it's a great system, but your business is unique. Salesforce implementations requires tech savviness, a deep understanding of your business, and the passion to do it right.

In order to get the very most out of Salesforce, you'll want to partner with a Salesforce consultant who understands your business needs and can help you reach your goals, be they training, customization, services, or a full implementation.

| Here are eight things to look for in a Salesforce partner to make your investment a success.



1

FIRST THINGS FIRST.

EXPERTISE IN YOUR INDUSTRY OR NICHE

One of the first things you'll want to look for is expertise in your specific industry. Nothing beats pairing with a partner that has deep expertise in the things that are important to you.

In the last year or so, Salesforce itself has emphasized industry focuses. They recognize that successful implementations don't require product expertise alone. Rather, it's about how well a Salesforce consultant understands your business goals, regulatory requirements, and common workflows. Ultimately, consultants with proven experience in your industry will implement your project faster and with more best practices, resulting in cost savings in both the short and long term.

Don't want to dig through a sea of results in Google searches? Salesforce offers an excellent consultant finder tool that helps you find your niche across over 15 industries, including healthcare, life sciences, and high tech.



SALESFORCE INDUSTRY FOCUSES

HEALTH & LIFE SCIENCES

Medical Device
Healthcare Providers
Insurance
Labs
Pharmaceutical

INDUSTRIAL

Agriculture & Mining
Automotive
Manufacturing
Gas & Oil

CONSUMER

Travel
Hospitality
Transportation
Retail
Consumer Goods
Media & Entertainment
Communications

EDUCATION

For profit
Not-for Profit

FINANCIAL SERVICES

Commercial Banks
Investment Banks
Insurance
Brokerage Firms
Planning Firms

PUBLIC SECTOR

Education
Utilities
Emergency Services
Law Enforcement
Infrastructure



[Click Here to access the Salesforce Consultant finder](#)

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ARE THEY EXPERTS?

A HEALTHY DOSE OF CERTIFICATIONS

Certifications are often seen as Salesforce’s stamp of approval. When you hire a certified Salesforce professional, you’ll have assurance that you’re receiving top-notch Salesforce services. There are a variety of certifications – Designers, thinkers, developers, and marketers. Choose the ones that are a good match for your needs.

It’s easy to view the certifications of any partner. Just go to the AppExchange, navigate to your partner of choice, and click the “expertise” tab.



SALESFORCE CERTIFICATIONS

SALESFORCE ADMINISTRATOR

Work with clients to define requirements, tailor the instance, and act as a user advocate.

- Administrator
- Advanced Administrator
- CPQ Specialist
- Marketing Cloud Administrator
- Platform App Builder

SALESFORCE ARCHITECT

High-level thinkers and system designers who create sustainable platforms that meet business short and long-term business goals.

- Application Architect
- B2C Commerce Architect
- Heroku Architecture Designer
- System Architect
- Technical Architect

SALESFORCE DEVELOPER

Technical coders who use declarative skills to customize and extend your Salesforce platforms.

- B2B Commerce Developer
- Javascript Developer I
- Marketing Cloud Developer
- Platform App Builder
- Platform Developer I
- Platform Developer II

MARKETER

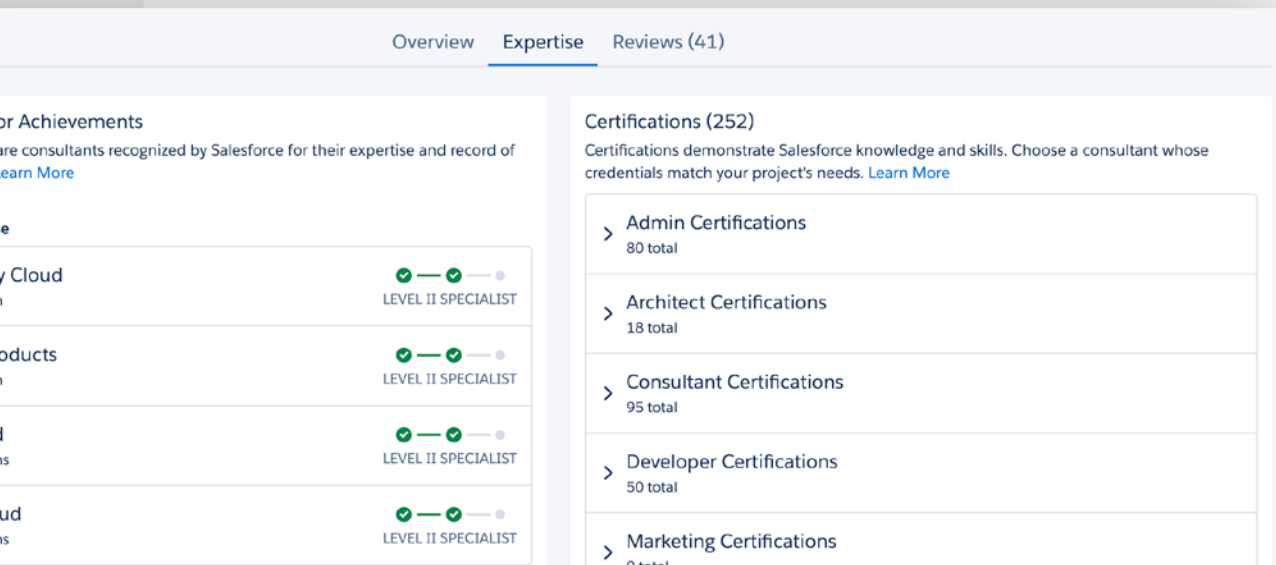
Strategic thinkers who develop targeted campaigns to create robust customer journeys from awareness, to consideration, to customer, and back again.

- Marketing Cloud Administrator
- Marketing Cloud Consultant
- Marketing Cloud Developer
- Marketing Cloud Email Specialist
- Pardot Specialist
- Pardot Consultant

SALESFORCE CONSULTANT

Ecosystem experts work with you to define requirements, tailor the platform, and advocate user adoption.

- Community Cloud Consultant
- Education Cloud Consultant
- Einstein Analytics Consultant
- Field Service Lightning Consultant
- Marketing Cloud Consultant
- Non-profit Cloud Consultant
- Pardot Consultant
- Sales Cloud Consultant
- Service Cloud Consultant



3

A HISTORY OF SUCCESS.

CASE STUDIES THAT SHOW SUCCESS

Case studies are another great thing to dig into when reviewing potential Salesforce partners. They're extremely helpful because they are a chance for partners to boast a little, while having the data to back up their claims. You can look at similar industries, pain points, and results you hope to achieve.

As an added bonus, case studies can also help you get a feel for the Salesforce partner's project management style, culture, and key proficiencies.

- Check out [Salesforce's official case studies here](#).

OTHER CASE STUDIES FROM INDUSTRY LEADERS



LifeStation needed a platform that would scale with its unprecedented growth.

Numotion needed a marketing automation platform capable of robust customer journeys.

MedBox needed an automated platform in order to continue providing the experience its patients depended on.

Fresenius needed a platform to reduce manual tasks in its bustling call center.

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CREDIBILITY WITH SALESFORCE.

HIGH NAVIGATOR LEVEL AND INDUSTRY FOCUS

When you begin your search for potential Salesforce partners, navigator status should definitely factor in. These replace the previous Silver, Gold, and Platinum badges, statuses that recognized the size of a partner.

Rather, Salesforce Navigator statuses recognize consultants for their expertise in a specific industry, product, or service.

This is determined by knowledge (number of credentials), experience (completed projects), and quality (measured by CSAT scores).

The criteria are strict; Expert Navigators must achieve specific goals and delivery objectives while driving customer success across multiple Salesforce implementations.

- Check out the badge breakdowns on the right.

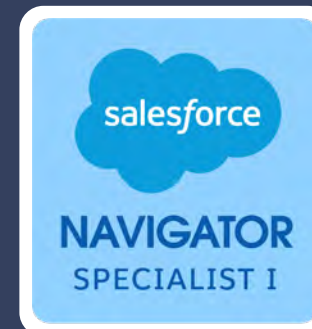
NAVIGATOR LEVELS



Most experienced. Capable of handling large, innovative projects that meet the highest business standards.



Higher standards of customer success than Specialist I.



Has knowledge and capacity for consistent customer success.

5

ANSWERING THE CALL.

A HISTORY OF RESPONSIVENESS

We've all been there. White glove service during the sales process and once the paperwork is signed and the payment has cleared, the service is suddenly slower, more impersonal, and lacking overall.

How can you make sure you're about to sign with a responsive partner? Ask them for references, as well as examples of previous projects. This gives you the opportunity to chat one-on-one with people who have worked with the prospective partner and you'll have a framework for asking specific questions.

Additional, ask what their client teams look like... normally, white glove consultants will provide a dedicated engagement manager who will be your biggest advocate.



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CUSTOMER FEEDBACK.

A STRONG APP EXCHANGE RATING

Pay close attention to the AppExchange rating and review section.

This is where you can hear from companies that have worked with the Salesforce partner and get their candid feedback. The ratings can help you quickly gauge which partners deserve a closer look, and the reviews will offer specifics about what is what like to work with them, their strengths, and how they helped clients succeed.

It's easy to view the rating of any partner. Just go to the AppExchange, navigate to your partner of choice, and click the "reviews" tab.

The screenshot shows the AppExchange interface for a partner's reviews. At the top, there are tabs for 'Overview', 'Expertise', and 'Reviews (41)'. Below this, a summary section displays '41 reviews' and a star rating distribution bar chart. The bar chart shows: 5 stars (80%), 4 stars (12%), 3 stars (5%), 2 stars (0%), and 1 star (2%). To the right of the bar chart, there is a large star rating of 4.8 with the text 'Average Rating' and an information icon. Below the summary, there is a section for 'All Reviews' with '41 reviews' and a 'Show' button. The first review is a 'Survey Response' titled 'Project Review' from 'Oct 22, 2020', marked as 'Salesforce Verified'. The review text states: 'The Penrod team does a fantastic job of waking you through every step practices to make you successful. They effort to ensure your company a definitely recommend partnering with Penrod on an implementation.' Below the review text, there is a thumbs-up icon and the text '0 Likes · Comment · Report Abuse'. The second review is also a 'Survey Response' titled 'Project Review' from 'Oct 8, 2020', marked as 'Salesforce Verified'. The review text states: 'Working with Penrod has been an extremely valuable and eye-opening standpoint. First of all, they thrive on accountability, the regular check-i'. The review is partially cut off at the bottom of the screenshot.

Star Rating	Percentage
★★★★★	80 %
★★★★	12 %
★★★	5 %
★★	0 %
★	2 %

41 reviews

★★★★★ 80 %
★★★★ 12 %
★★★ 5 %
★★ 0 %
★ 2 %

★★★★★ 4.8
Average Rating ⓘ

All Reviews 41 reviews

Survey Response
Project Review

★★★★★ Oct 22, 2020 ✓ Salesforce Verified ⓘ

The Penrod team does a fantastic job of waking you through every step practices to make you successful. They effort to ensure your company a definitely recommend partnering with Penrod on an implementation.

0 Likes · Comment · Report Abuse

Survey Response
Project Review

★★★★★ Oct 8, 2020 ✓ Salesforce Verified ⓘ

Working with Penrod has been an extremely valuable and eye-opening standpoint. First of all, they thrive on accountability, the regular check-i

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KEEPING YOU TOP OF MIND.

A STRONG RELATIONSHIP WITH SALESFORCE.

A dynamic ecosystem like Salesforce isn't "set it and forget it." New enhancements and functionality are released regularly to help companies keep up with a changing digital and business landscape.

That's why it's important to choose consultants that have a strong relationship with Salesforce. By partnering with people who are plugged into the latest news and innovations, you can rest assured you're getting the most up-to-date information and guidance to help you reach your business goals.

Ask if they have members on Salesforce advisory boards. See how long they've been in the ecosystem. The stronger their relationship, the better they'll be at delivering for you.



salesforce

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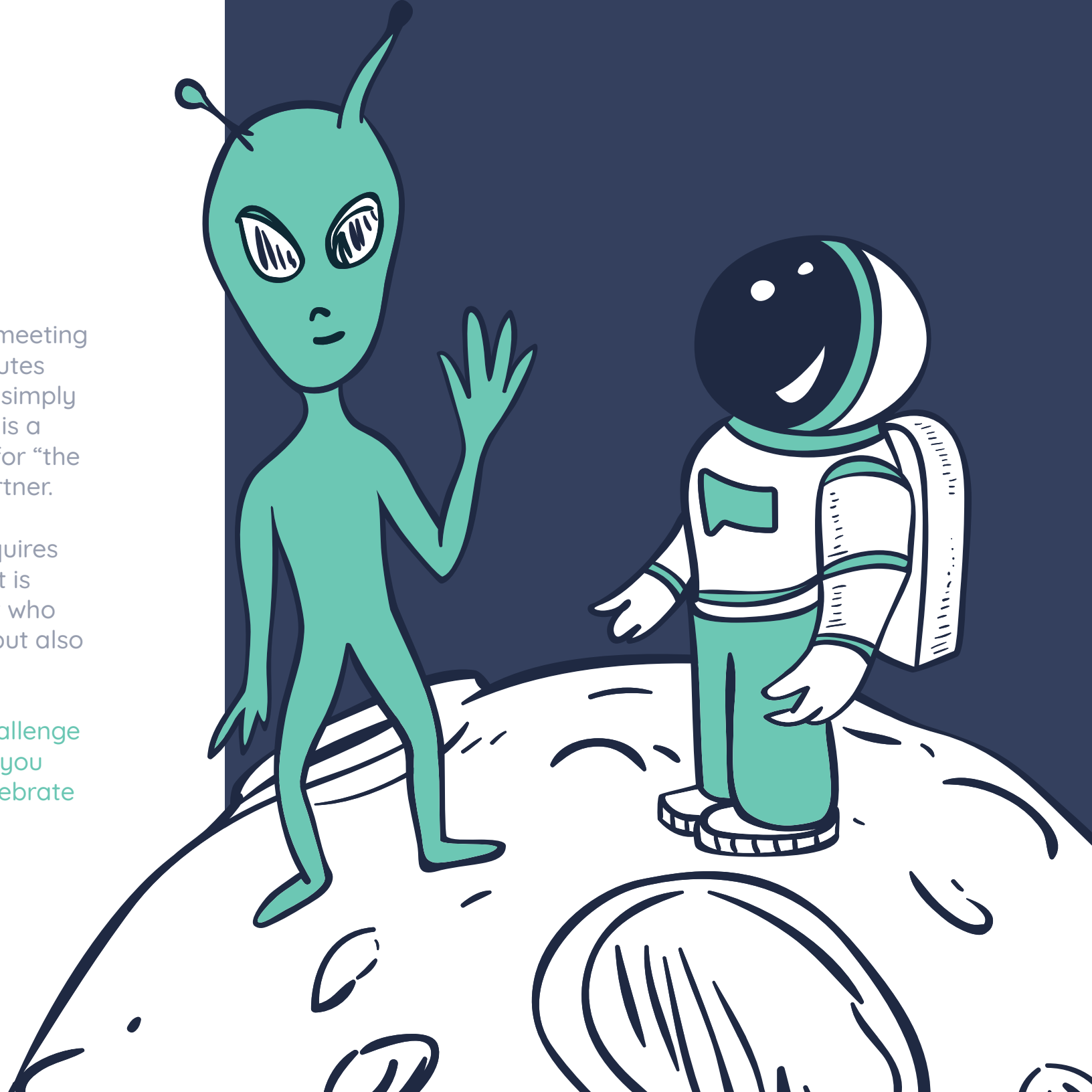
PURSUING AUTHENTICITY.

A SYMBIOTIC CULTURE FIT

We've all been there, in a long planning meeting with consultants, counting down the minutes because the celebrated consultants are, simply put, not genuine. It feels...alien. Expertise is a must-have, but you don't have to settle for "the Bobs" when you choose a Salesforce partner.

Configuring your Salesforce instance requires collaboration and creativity, so culture fit is important. Look for a Salesforce partner who will dig deep during planning meetings, but also makes the process authentic.

A team that doesn't shy away from a challenge or a tough conversation in order to help you crush your business goals - and then celebrate your success.



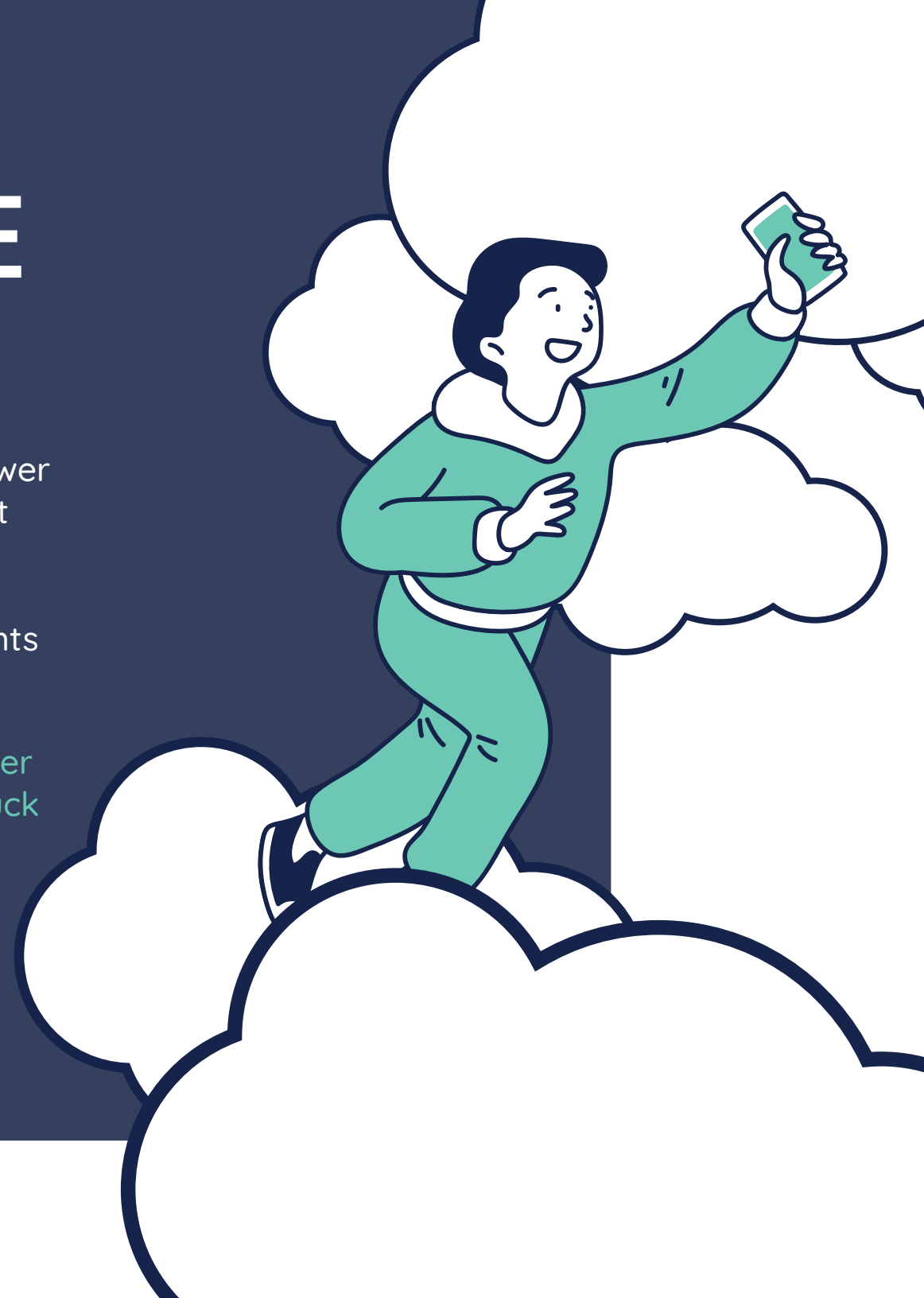


REACH FOR THE CLOUDS.

MAKE YOUR SALESFORCE PROJECT A SUCCESS.

A Salesforce implementation or enhancement can help power your business operations and even grow your business, but you need the right partner to make it a success. Choose a partner that has technical expertise in Salesforce, a deep understanding of your business, and a passion to help clients succeed.

When you find the right partner, you'll unleash the full power of the Salesforce ecosystem to reach your goals. Best of luck in your search!





PROVEN HEALTHCARE EXPERIENCE

WE'RE BACKED BY SALESFORCE.

Salesforce awarded Penrod the Expert Navigator designation in healthcare and life sciences because we provide deep expertise in their ecosystem, including a demonstrated history of customer success — like the story you just read.

This proven proficiency empowers us to connect with our customers in ways other consultants can't.

Get in touch to see why **Penrod is Proven.**



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