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WHITEPAPER · 2026

Managed services or in-house? A decision guide for Salesforce owners

Capacity, continuity and control: how to choose the right resourcing model

Setlerz IT Solutions
Certified Salesforce Consulting Partner | www.setlerz.com

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About Setlerz

Setlerz IT Solutions is a certified Salesforce Consulting Partner headquartered in Pune, India, with a US presence in Sheridan, Wyoming. Founded in 2023, the team holds 13+ Salesforce certifications and carries a 4.95 rating on Salesforce AppExchange. Setlerz supports businesses that need Salesforce to work and consulting firms that need delivery capacity.

01 Executive summary

Every Salesforce owner eventually faces the same decision: keep building a team in-house, or bring in a managed partner. The question is usually framed as cost. It is better framed as capacity, continuity and risk.

This guide is for CIOs, heads of IT, Salesforce product owners and finance partners who need to decide how to resource Salesforce administration, development and specialist work. It sets out four resourcing models, explains where each one works and where it struggles, and offers a framework for choosing. It also describes how Setlerz structures its managed packages and dedicated expert tiers.

The short version

- No single model fits every organization, and the best answer is often a hybrid.
- The costs that matter most, such as single points of failure, skill gaps and release risk, rarely appear in a salary comparison.
- A managed retainer works best when scope, response times and review cadence are written down.
- Start by writing down what work you actually have, then match the model to it.

4	4	3
resourcing models compared	Setlerz managed packages	dedicated expert tiers

02 The real question behind build versus buy

Most comparisons put one salary against one retainer and stop. That misses what actually determines whether a Salesforce programme succeeds. Four questions are more useful:

Capacity

Is there enough skilled time available when the work arrives, including the unplanned work? Demand for Salesforce changes is lumpy: quiet for weeks, then a rush.

Breadth

Salesforce spans administration, development, integration, and specialist clouds. No individual covers all of it, and hiring one person for each is rarely practical.

Continuity

What happens when the one person who understands the org is on leave, or leaves? Single points of failure are among the most common risks in smaller teams.

Control

Are changes tested, reviewed and released safely? Sandboxes, release management and governance protect the org, whoever does the work.

Once capacity, breadth, continuity and control are on the table, the cost conversation changes. The question becomes: which model gives us enough of each at a price we can sustain?

03 Four ways to resource Salesforce

Model	How it works	Works best when	Watch out for
In-house team	Employees own administration and development	Steady, high volume of work and a mature Salesforce programme	Single points of failure, narrow skills, hiring time, uneven workload
Dedicated resource	A named developer, lead or architect embedded in your team monthly	You need extra capacity or a specific skill working as part of your team	You still manage the work day to day
Managed retainer	Ongoing support and enhancements for a flat monthly fee, with agreed scope and response times	Run and improve work that is steady but does not justify more hires	Needs clear scope limits, otherwise expectations drift
Project-based	Fixed scope and timeline for a defined piece of work	A build, migration or optimisation with a clear end	Not suited to ongoing upkeep

These are not mutually exclusive

Most mature Salesforce programmes use more than one. A small in-house team that owns priorities and business knowledge, supported by a managed retainer for upkeep and a project partner for large builds, is a common and effective pattern.

04 Where in-house teams run into limits

Skills breadth

A single administrator may be excellent at configuration but not at Apex, integration or Marketing Cloud. A developer may be strong in Lightning but not in data architecture. As the platform grows, the number of distinct skills required outgrows the team.

Single points of failure

When knowledge lives in one head, the organization is exposed. Documentation helps, but a team of one or two people has no depth to cover holidays, illness or turnover.

Peaks and troughs

Salesforce workload is rarely smooth. A release, an acquisition or a new product launch creates a surge. Hiring for the peak leaves the team under-used the rest of the time; hiring for the average leaves it overstretched at the peak.

Release discipline

Without a consistent process for sandboxes, testing and deployment, changes reach production with too little scrutiny. This is where orgs accumulate hidden problems, such as automation that conflicts and limits that are hit unexpectedly.

> *In one Setlerz engagement, budget cuts meant a manufacturing client needed to "do more with less" from an underperforming Salesforce investment. The answer was not more headcount. It was a redesigned architecture that stayed inside governor limits and was configurable enough for the client's own team to maintain.*

05 A hybrid model and how to choose

The hybrid model keeps the strengths of an in-house team, which are business knowledge and ownership of priorities, and fills the gaps with outside capacity.

1. **Keep in-house**
   Priorities, business process knowledge, stakeholder relationships and approval of changes.
2. **Use a managed retainer for**
   Administration, support tickets, small enhancements, monitoring and reporting.
3. **Use dedicated experts for**
   Sustained build capacity or a scarce skill, working as part of your team.
4. **Use projects for**
   Large builds, migrations and optimisation with a defined end.

Choosing a model: seven questions

Question	If the answer is yes, lean toward
Is workload steady and high enough to keep a full-time person busy?	In-house or dedicated resource
Is workload uneven or unpredictable?	Managed retainer
Do we need skills across several clouds?	Managed retainer or dedicated experts
Do we depend on one person for critical knowledge?	Add a managed partner for continuity
Do we have a defined, finite piece of work?	Project-based
Is our time zone coverage a constraint?	A partner with agreed overlap hours
Do we need to scale quickly up or down?	Managed retainer or dedicated resource

06 Setlerz managed packages explained

Setlerz offers four managed packages, each at three levels (Basic, Standard and Premium) with increasing monthly hours and faster response. They are sold as flat monthly retainers.

Package	Focus	What it covers
SFCare	Admin and setup essentials	All admin tasks, training and support; Sales and Service Cloud setup; data model setup; data migration; business process configuration
SFWise	Discovery and planning	Requirement gathering, process analysis, proof of concept, feasibility, tech-stack assessment, data flow diagram, migration plan, timeline and cost
OurSFDev	Build and development	Everything in SFCare plus Apex, LWC, Flow and triggers, component development, any-API integration, deployment, testing and bug fixing
SFExpert	Full-platform specialist	Admin and development plus Experience Cloud, mass data migration, AppExchange development, CPQ, Account Engagement, Commerce, Agentforce and AI enablement

Level	Response time	Hours of cover	Review cadence
Basic	2 business days	Monday to Friday, India hours	Quarterly review
Standard	1 business day	4 hours overlap with US time	Monthly review
Premium	4 business hours	Extended US overlap	Named delivery lead, bi-weekly check-in

Marketing Cloud and Account Engagement have their own managed support offerings, covered in a separate Setlerz paper. Pricing is shared during a short discovery call, so that scope and level can be matched to your org.

07 Dedicated experts by tier

If what you need is a person rather than a package, Setlerz provides dedicated experts in three tiers. A named full-time person is embedded in your team and billed monthly.

Consultant

3 to 5 years of experience. Hands-on delivery of builds, configuration and support.

Senior Consultant

5 to 8 years of experience. Owns delivery of a workstream and guides the team.

Architect

8 to 12 years of experience. Solution architecture and technical leadership.

Specialist roles are available across the tiers, including Salesforce developers and administrators, Marketing Cloud and Account Engagement specialists, CPQ, Commerce and Data Cloud specialists, Agentforce and AI specialists, and quality analysts. Every consultant holds the credential for the cloud they work in.

When this model fits

A dedicated expert suits teams that already manage their own backlog and need skilled hands, or one scarce skill, without a long hiring process.

08 Making the transition and the contract

A sensible transition

1. **Inventory**
   List the work you have: tickets, enhancements, projects, and the skills they need. Include the unplanned work.

2. **Define scope**
   Agree what the partner owns, what stays with you, and the indicative inclusions for each.

3. **Document and hand over**
   Share access, documentation and context in a structured onboarding. Agree sandbox and release rules.

4. **Start with a review point**
   Plan a first review within 30 to 60 days and adjust scope and level using real data.

What to put in the contract

- **Scope and inclusions:** what is covered, and how extra work is approved and billed.
- **Term and prepay:** Setlerz packages carry a three-month minimum, with a discount for prepaying twelve months.
- **Hours:** whether unused hours carry forward. At Setlerz they do not unless agreed in the order form.
- **Response times and cover hours:** by service level.
- **Confidentiality:** NDA-first, with white-label delivery available for consulting partners.
- **Order form:** invoicing, payment, notice and termination terms.

09 A decision checklist

Check	Done
We have written down the work we have, planned and unplanned	☐
We know which skills that work needs, across clouds	☐
We know who holds critical knowledge, and what happens if they leave	☐
Our sandbox, testing and release process is defined	☐
We have agreed which work stays in-house and which goes to a partner	☐
Scope limits, response times and review cadence are in writing	☐
We have a first review date to adjust the arrangement	☐

Right-size your Salesforce support

Tell us about your org, your team and your backlog, and we will recommend a package or a dedicated expert tier. Book a call at **calendly.com/setlerz** or write to info@setlerz.com. Setlerz is a certified Salesforce Consulting Partner with 13+ certifications on the team and a 4.95 rating on Salesforce AppExchange.

Setlerz

Right-size your Salesforce support.

Talk to a certified Salesforce consultant about the package or expert tier that fits your org.

Free Agentforce readiness assessment

Book a call

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