



DNA OF THE TOP
SALESFORCE CONSULTANT



Quick Facts

- Top 1% of Salesforce Consulting Firms
- We have 95% of the certifications available on the platform
- We practice Salesforce best practices from start to finish
- Over 85 5-start reviews!
- Over 500+ Successful implementation across the globe

LOOKING FOR THE BEST SALESFORCE PARTNER? It all starts with the DNA of your lead Salesforce Consultant

Choosing the right Salesforce consultant for your Salesforce implementation may not be as straight forward as you think. In my opinion experience really does matter! We have lots of customers that reach out to us because other firms were not able to complete the mission. Customers were sold by a senior Salesforce consultant only to get an entry level resource with less experience once the project started. When selecting the right Salesforce consultant for your project make sure you are able to meet and interview the specific resource (or team) that will be driving your project.

Key Salesforce Consultant Attributes:

- Strong experience in your industry - recommend 5+ years Salesforce with 100 + projects
- Strong experience in the functional area you are looking develop
- Consultant personality that fits with your internal team
- Self-motivated and strong work ethic to drive your project forward independently
- Strong communication with the ability to communicate with all levels of your organization

Experience in Your Industry

Innovation comes from a new mindset but it is still very important to have experience in the industry. This will shorten the ramp-up time and also give you a perspective based on what other leaders in the industry are doing. Research has proven, beyond a reasonable doubt, that consultants will be successful in a role that where they have strong domain experience. That being said you should try to us a non-convention staffing model to build a team with various skills sets, technology experience, and project experience to expand your organization's talent capabilities.

Experience in Functional Area

Hands on experience with the specific application you are looking to deploy is critical so that you are not paying for on the job training. An experienced Salesforce consultant will come with a proven plan for the implementation. Having the experience of multiple implementations is critical to be able to push back on requirements may have detrimental impacts to the organization. Functional experience will also allow the Salesforce consultant to mentor, coaching, explain and guide your internal business and development resources.



Why Use A Certified Partner?

- Accountability for quality & delivery
- Development done right the first time
- Rapid time to value
- Deliver scalable solutions to meet growth needs
- Help you drive user adoption

Personality and the Right Skill-Set for Your Team

There is evidence that creating implementation teams with complementary skills, shared values, and similar working styles create better innovations and are more efficient. Your first step should be to determine what capabilities are needed to successfully implement your strategy. We recommend the use of a capability matrix to understand if the Salesforce consultant has the right skillsets to fill the gaps of the peers' in the current team. You don't want a team that simply "gets along", you need to focus instead on the right mix of skills with the right values and then create a work team that enhances their collaborative strengths. The right Salesforce consultant should respectfully challenge the team to think outside the norm and make decisions that will benefit the enterprise not just individual business units (or individuals). The trust of the other members is critical for the consultant to be successful in this role.

Self-motivated & Strong Work Ethic

For many people work-life balance is a popular phrase today, and it's important but the reality of a good Salesforce consultant is that they're probably going to have to out-work his/her peers. They must be one step ahead of the game at all times which means working along side the client during the day and researching design options after work. They must enjoy and thrive on learning new businesses, new products, features and functionality. Salesforce has quarterly feature releases and it is important do study these early and be equipped to advise the client on the impacts and benefits of the new functionality. I meet a lot of successful Salesforce consultants and am fascinated to learn about their journey to success, which is almost always paved with the love for learning and hours of hard work.

Strong Communication

The single most important skill needed to be an effective Salesforce Consultant is being a good communicator. Expert communication from business leaders to technical programmers is at the core of everything we do. Every project starts by listening to our clients, learning about the systems, their business process, data workflow, and executive goals. We need to understand what is working, what is not, and determine the areas for improvement. Listening is key but knowing how and when to ask the right questions is critical to get to the core of what the client's objective. Once we document the requirements and design a solution, we have to be able to explain what we're planning in terms that the business can easily understand. This includes being able to clearly articulate the project successes, risks and budget to the executive team. This is what separates the best consultants from that pack!



What Makes Cirrius Solutions Different?

500+

We've Completed
Over 500 Projects

TOP 1%

We're in the Top 1% of All
Consulting Partners.



Our 5 Star Average Rating
on Appexchange

Customizing Salesforce CRM for the first time can be daunting, and often you could benefit from engaging an experienced Salesforce consultant.

4 STAGES TO FINDING THE RIGHT CONSULTANT:

1. Preparation – Understand what you want

- Write down your business requirements in as much detail as possible.
- Prioritize your business requirements into high, medium, and low.
- Determine what business requirements are: “wants” versus “needs”.
- Have a budget in mind.
- Have a timeframe in mind.

2. Due Diligence – Asking & checking

- Ask your network for referrals for Salesforce consultants.
- Ask Salesforce consultants for their references and check their references.
- Ask if they have worked with organizations of your size and industry before.
- Check if there is more than one Salesforce consultant at their company.
- Ask for certifications or proof of experience.

3. Selection – No surprises

- Ask for a Statement of Work (SOW) that details the scope.
- Is it a fixed price or an estimated time & materials quote?
- What are the payment terms?
- Can you work with the consultant – are they a good fit?
- Work to establish timelines for project kick-off and target end dates.

4. Engage – Work with your trusted partner

- Execute the Master Service Agreement (MSA) and Statement of Work (SOW).
- Expect to attend short daily project meetings.
- Your consultant will design, build and testing the software solution.
- Your team will test and accept functionality as it is built.
- Monitor burn down of hours.
- Go-Live and drive business success!

GET STARTED TODAY!

Learn more about how Cirrius Solutions can help you make the most of your Salesforce.com investment.

Please contact your Cirrius Solutions Account Manager directly at info@cirriussolutions.com for more information.

