

CHECKLIST

for choosing the best Salesforce consulting partner for your project



Factors to consider in a company profile	Yes	No	N/A
Clutch reviews (10 minimum)			
Similar industry cases			
Salesforce domains mastered:			
- Main (Sales, Service, Marketing Cloud, Commerce Cloud, Financial Services Cloud)			
- Less frequent (Pardot, MuleSoft, CPQ, Visualforce)			
Billing system:			
- Project-based			
- Managed Services			
- Time & Materials			
Make sure the company has expertise in the challenges you plan to address:			
Help in the formalisation of the project goals			
Employee onboarding			
Architectural optimization			
Budget optimization			
UI simplification			
Building custom apps			
Creation of Salesforce integrations			
Technical audit			
Data migration			

We always take your pace at each stage of the process to let you evaluate our compatibility. [Get in touch](#) for a free consultation to define the guideline of your Salesforce org optimization and expansion.



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Originally published on [twistellar.com](https://www.twistellar.com)

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