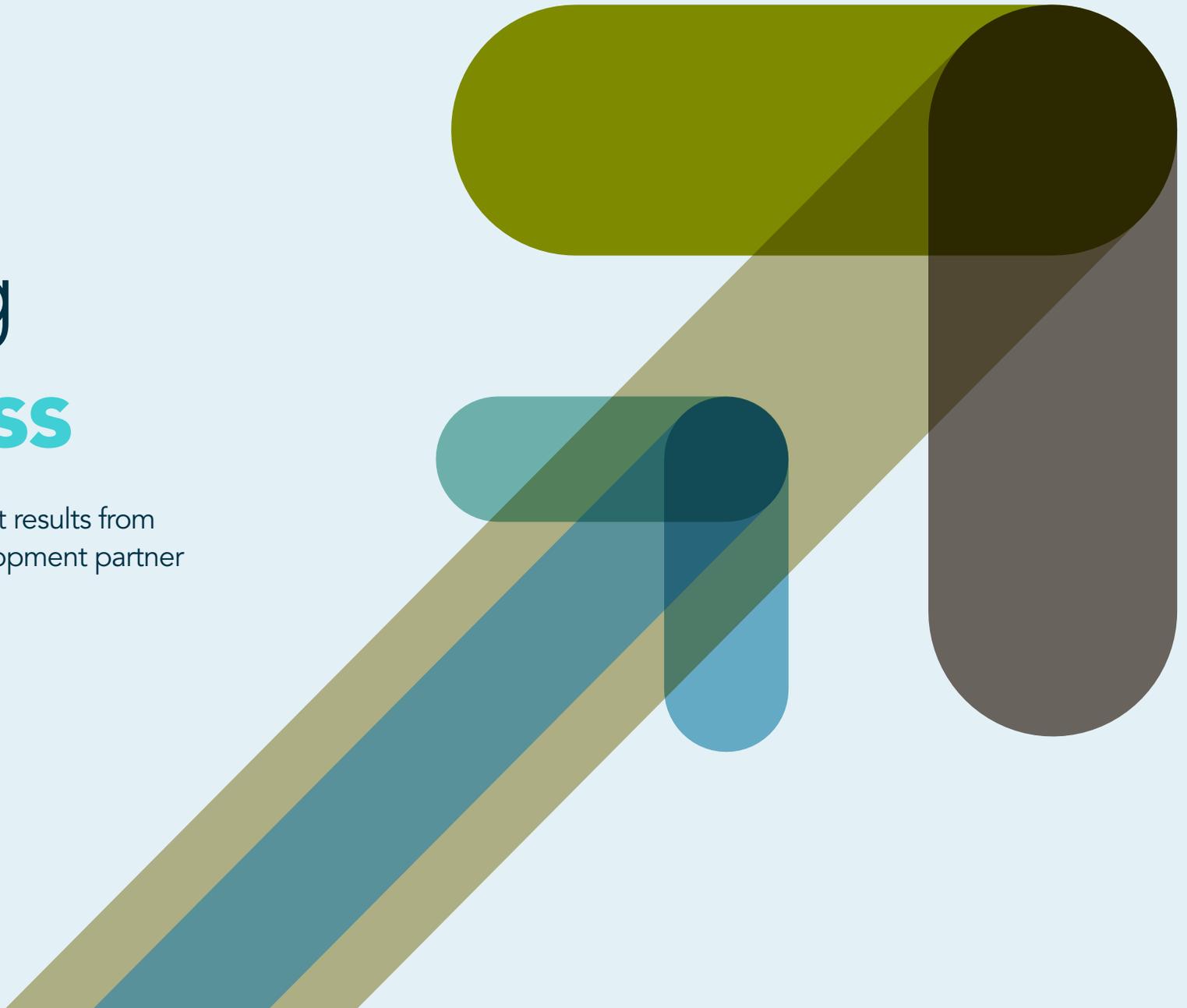


desynit

Partnering for **Success**

The quick guide to getting great results from
an outsourced Salesforce development partner

www.desynit.com



Introduction

Salesforce is an amazing platform to work with. Whoever you serve and whatever you want to achieve, the possibilities within it are almost endless.

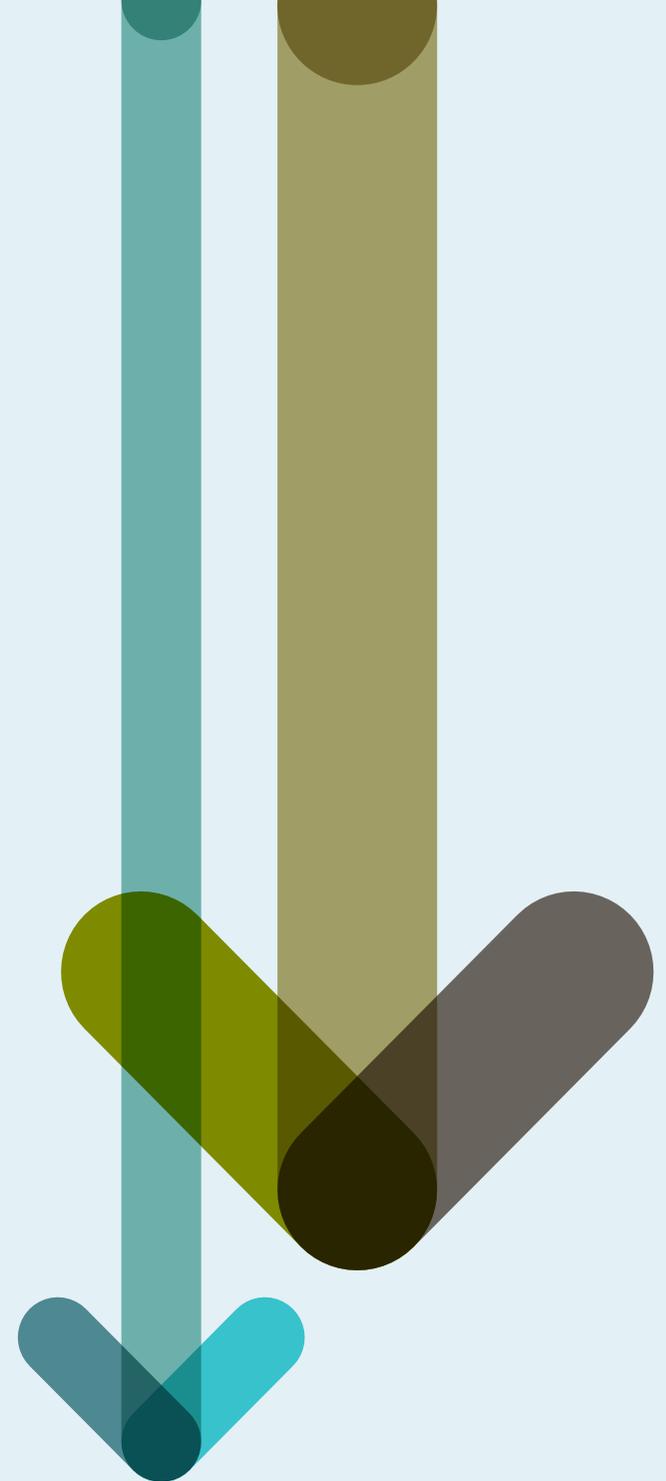
But that can mean that even if you've sculpted a skilled team of seasoned technical experts, you're not always going to have everything you need to bring your latest and greatest Salesforce products to life.

Sooner or later, you're probably going to need some help from an outsourced partner. Whether it's because you've recognised a need for technical skills you don't have, you need some fresh external eyes on a persistent challenge, or just because you're at capacity and up against the clock, engaging a partner is a great way to get what you need from Salesforce, when you need it.

However, not all partnerships are born equal – and what you put in will have a huge impact on what you ultimately get out of it. Send your work overseas and ignore it until it's done, and you can expect mediocre results at best. But select a partner carefully and engage with them often, and you're much more likely to end up with something that meets your exact needs first time.

At Desynit, we've been fortunate enough to partner with a wide range of businesses, of many different sizes, over the years. It's been an exciting journey, and one that's helped us build up a strong understanding of what makes for a great, productive Salesforce development partnership.

In this short guide we'll provide you with some quick tips and insights to help you choose the right partner for your next Salesforce implementation project – and get the best results possible from them throughout the process.



SECTION ONE

Why engage with a partner in the first place?

If you want to get the most from an outsourced Salesforce development partner, the first thing you need to clarify is exactly why you're engaging with them.

Defining what you need their help with, and why a partner is better suited to handle the task than your other development resources, will help you build up a clear picture of what success looks like. And it will keep your new partnership on course to achieve those goals throughout the project.

To help you get started, here are some of the biggest and most common reasons why the organisations we help come to us:

- To benefit from our breadth of experience handling challenges that are entirely new to them
- To access additional resources when they're up against tight deadlines and timelines
- To gain deep new technical capabilities that aren't held within their current team
- To bring in some fresh sets of eyes for an innovation project that requires a unique perspective on their operations
- To gain the benefits of Agile approaches that their team may be too large to fully embrace itself
- To generate greater enthusiasm for a major new project, and have a partner help drive it forwards
- To help change the culture of development in their business by adding new approaches and perspectives to their team
- To tackle specific technical challenges with Salesforce that require expert input and assistance
- To expedite the development process and find a faster alternative to relying solely on internal teams, or other, larger outsourcing partners

“Moorhouse prides itself on providing specialist expertise to its clients – so it made sense that we follow the same approach with business support. **We don't have a volume of Salesforce activity that warrants dedicated internal resources. So, naturally, we partnered with experts who know the platform best.**”

JON RUSSELL, MOORHOUSE

Becoming a partner yourself

Like any partnership in life, your partnership with an outsourced Salesforce developer is a two-way relationship. They're an extension of your team and need to be enabled and supported in the same way your internal team members are.

If you want to get the most from your relationship with them, you'll need to give a little too – and understanding what you want from your partner is the first step in making that happen.

It's important to recognise that as soon as you engage with an outsourced partner, you become a partner too.

To ensure your project is a success, your new partner needs you to:

Take up a collaborative role as project coordinator

Even if you outsource development entirely, the project is still yours to control and direct. The closer you work with your partner, and the more frequently and openly you're able to collaborate with their team, the better the final results will be.

Communicate openly and regularly

Open communication is the key to success in any partnership. Give feedback promptly and regularly, communicate honestly about project progress, and never be afraid to ask questions when they come up. By doing that, you can ensure your project stays on track and on brief at every stage of the process.

Treat your partner as an extension of your team

Your outsourced partner may be a Salesforce expert, but they still need direction that only you can give. Before you engage with them, you should know exactly what you want. Once the partnership begins, it's your responsibility to communicate that clearly, to ensure they're able to deliver exactly what your business needs.



SECTION TWO

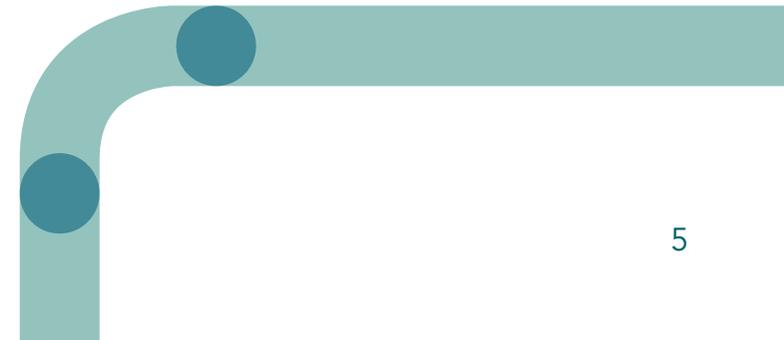
What makes a partner great?

There are plenty of outsourced partners out there who would love to help you develop new Salesforce capabilities – and many of them are able to deliver good results. But what really separates the good from the great?

Choosing a partner is the most important decision you'll make in the entire outsourcing process. Here's what to look out for to make sure your first choice is the right one.

A great partner should:

- **Complement your team, not mirror it:** A partner is so much more than just an additional resource – it's an opportunity to get fresh perspectives on your ideas and operations and bring new approaches and ideas into your business. A partner with a culture different to your own can be a huge advantage, not a drawback.
- **Make you a priority:** If a project is critical to your business, it should be critical to the partner you work with, too. If a partner doesn't see you as a priority, the results of your project will suffer.
- **Take the reins when necessary:** A partnership is a two-way relationship. No partner should ever spend all their time awaiting direct instructions from you. Once they understand your needs, they should be confident driving the project themselves.
- **Bring specialist technical expertise to the table:** Your partner should use their knowledge and expertise to help you see opportunities that you may not realise exist. They should be focused on helping you understand how tech can help you achieve the results you need, not simply using tech in the exact way you've asked them to.
- **Work to understand you and your demands:** Great partners ask questions. They endeavour to find out as much about your business as possible, so that they can come up with great ideas that generate the best results and outcomes for you.
- **Become a trusted advisor:** A great partner doesn't just provide help, they provide advice. They'll come to you with ideas, and be willing to make their voice heard when they think the direction you've chosen isn't the best one possible.
- **Be willing to say no to you:** A great partner will constantly ask questions of your requests and be willing to say no when they don't think you're making the right choices. Then, they'll provide useful input to improve and refine your ideas.
- **Bring enthusiasm and excitement to the project:** A partner's attitude and approach can make a big difference to your development project. You should be able to feel their excitement and enthusiasm, and that feeling should permeate across your entire team.
- **Be flexible and ready to course-correct:** Having a clear plan is important, but even the best laid plans need to be flexible. Great partners will be ready to adapt if things don't work out as desired and will help you find a new route that still delivers what you want.



The value of Salesforce specialisation

Lots of development partners will be able to help you with Salesforce projects. But to ensure the best results, it's worth seeking out a partner that specialises in Salesforce development.

It's not just their mastery of the platform your business can benefit from – they'll also have a lot of experience tackling the kinds of challenges that companies often want to solve within Salesforce.

Nobody is better positioned to help you do things like:

Streamline back-office operations by improving integration with external apps

Use Salesforce as a database and perform complex pricing calculations

Improve user experience via the use of Lightning Components using Skuid or extending out to Javascript

Pull all your pricing and sales data into one reportable place

Stay current and understand the latest additions and updates to the Salesforce platform

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“For us, one of the biggest benefits of engaging with a Salesforce technical delivery partner has been **using their expertise to stay on top of frequent changes to the Salesforce platform.** There have been significant shifts in the last few years – many of which have impacted implementation, scalability and deployment – so **staying current has been critical.**”

ROSS CROOKE, BTS

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SECTION THREE

The big (or small) decision

Salesforce development and implementation partners come in all shapes and sizes, and it's worth having a think about which kind of organisation might be best suited to help you and serve your business.

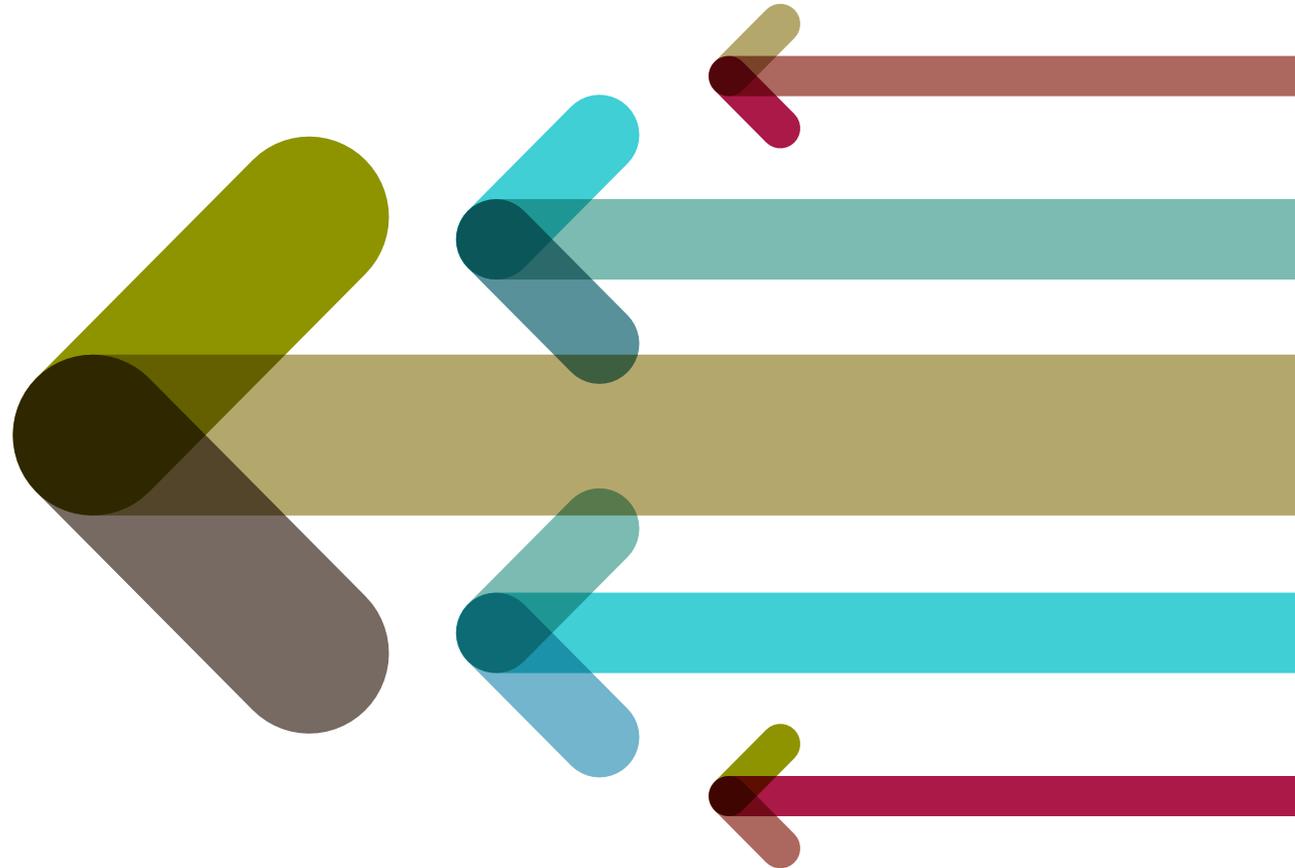
Roughly speaking, you've got one clear choice to make: should you go with a proven global partner with an established track record, or a smaller, more agile partner that can help you innovate and take a fresh approach to development?

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“Working with a smaller partner like Desynit has been perfect for our team. Lower overheads mean they can deliver great value for money, and because they have fewer layers of management, it's easy for us to get impartial advice and talk through our ideas with an expert whenever we need to.”

GERARD HUTCHINGS,
BLUEBAY ASSET MANAGEMENT LLP

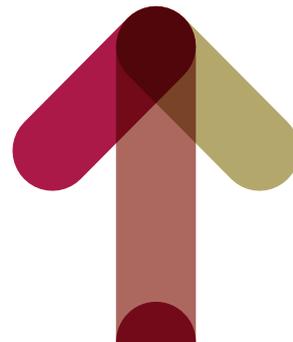
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Unfortunately, there's no simple answer. There's clear merit to both options, and ultimately, it comes down to finding the right kind of partner for you. To help you decide which one might be the best fit, here's a quick rundown of the pros and cons of both options.

Smaller Partners

Pros	Cons
Able to fully embrace Agile methodologies and work in an agile way, instead of just saying they do	Less proven, and carry a higher theoretical level of risk
Heavily invested in your company, and eager to build lasting relationships	Lower capacity if they win lots of contracts at once
Tend to be more affordable	May not have tackled a situation exactly like yours before
Smaller team and greater interest in your unique situation enable them to innovate and come up with creative solutions	Like frequent input and feedback
Typically able to get to work very quickly	
Smaller structure means it's easier to reach the people in charge and get a feel for how competent the team is	



Larger Partners

Pros	Cons
Proven in their market	Higher cost
Reliably deliver consistent outcomes	Often somewhat rigid in their processes
Have tackled common scenarios countless times before	Projects can carry long lead times
Confident taking straightforward requests and meeting them with little input	Scale of experience can lead to taking a somewhat generic approach to problem solving
Wide range of different consultants available	No guarantee that you will be allocated a team with the skills you really need



Opposites attract in Agile development

On the surface, it would be easy to think that small development partners and large businesses shouldn't mix. They work differently, their processes and operations contrast completely, and there's a huge difference between their cultures.

But, in practice, all of those are actually reasons why the two work so well together. Outsourcing Salesforce development projects is an opportunity to bring fresh perspectives into your business, and that's exactly what engaging with a smaller partner does for established multinational businesses.

Your agile partner will view your challenges in a different way, offering unique insight that your business may have missed. They'll bring a new level of excitement and enthusiasm for your projects that can have a profound impact on the culture of your current teams. And, they'll work tirelessly to impress you and build a lasting relationship with your organisation.

Quite simply, the two work perfectly together – with industry analysts such as Gartner¹ agreeing that big businesses have a huge amount to gain by working with and learning from smaller, leaner, more agile partners.

That's exactly what we found when Desynit recently worked with a well-known global oil company to help transform the way its teams handle complex pricing calculations in Salesforce. By working closely with the team and bringing a mixture of Salesforce expertise and Agile development practices to its organisation, we were able to deliver a solution that the company and its users love.

The project brought mutual benefit to both teams. We got to learn more about the demands of huge multinational companies with complex pricing and product structures, and the company got to take a fresh approach to development that had a lasting impact on the culture of its team. *Everybody won.*

¹ <https://www.gartner.com/smarterwithgartner/why-big-companies-need-lean-startup-techniques/>



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“For us, working with a smaller partner like Desynit enables us to genuinely partner. We immediately identified the value we could deliver for each other's businesses, and augmented our teams to help us work together as effectively as possible. **Smaller partners are often more invested in your outcomes, and able to deliver very quickly.** Desynit certainly proved that for us.”

ROB HINGSTON, SIGMA SYSTEMS

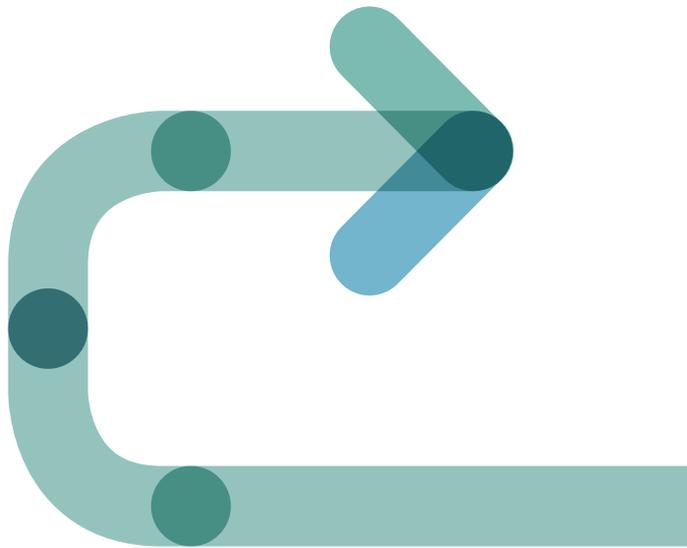
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SECTION FOUR

Upholding your side of the deal

As we've established, partnerships are two-way relationships. If you want to get the most out of your chosen partner, there are several things they'll need from you.

You can be a great partner and have a massive impact on what they're able to deliver if you:



Provide frequent, productive feedback:

Partnerships are collaborative. When you have input or thoughts, provide them as quickly and clearly as you can. That's the key to keeping a project on track and ensuring you get what you really want at the end.

Get your entire team aligned before you bring anyone else in:

Before you get a partner involved, it's important to know exactly what your organisation as a whole wants from the project. If new stakeholders enter the process part of the way into development, it's going to slow the process and delay implementation as the dev team adapts to new input.

Take their advice on board: A great partner will tell you when your ideas aren't realistic or might take you in the wrong direction. They want what's best for your organisation, and you need to trust their input and advice – even when it stands in contrast to an idea you've grown attached to.

Set realistic expectations: If you have a limited budget, that's not a problem, but you should make sure that you don't expect too much from your partner. Clearly lay out what you have to spend at the beginning of the project, and they will help you understand what can realistically be achieved within that budget.

Be as flexible as you'd like them to be:

When you change your mind about something during your project, you want a partner that's willing to adapt. The more willing you are to make changes during the project and adapt for a better outcome, the more willing your partner will be to do the same.

Don't deviate from your own timelines:

If you have a strict deadline for project delivery, make sure you and your team do all you can to stick to it too. Things like delayed internal feedback can easily cause timelines to slip and put unnecessary pressure on your partner as well as your business.

Avoiding the trust trap

Everyone wants a partner they can trust to deliver great results and impartial advice. But often, trust only comes once great results have been delivered. That makes great first engagements tricky and stops many partnerships from ever getting off the ground.

It's a classic Catch-22 situation – but not one you can't work around. The key to avoiding it is finding a partner you can trust (and establishing that they are worthy of your trust) from the start.



“It's important that a partner takes time to understand our needs. But, what's really valuable is when a partner is able to point out when we're making a mistake and help us consider alternative approaches. **That's the foundation of a great, trusting relationship.**”

LYNNE REEVES, GLADSTONE SOFTWARE



Here are some quick tips to help you find a Salesforce development partner that you can confidently place your trust in from day one:

- **Take a look at their track record:** A new partner won't have worked with you before, but they've probably delivered good results for other businesses. Have a look at what they've achieved, get them to talk you through similar past projects, and get a feel for what you can expect from them.
- **Have as many conversations with them as possible prior to your first project:** Talking to a prospective partner is the easiest way to get a feel for what they'll be like to work with. That will enable you to ask all of the right questions and quickly understand whether you're talking to an organisation you can trust from the off.
- **Make sure they're a Salesforce Registered Partner:** If a partner claims to be a Salesforce expert, they should have the certifications to prove it. Look for registered partners that Salesforce has already vetted for you.
- **See what their clients have to say:** It sounds simple, but if a partner is great, others will probably have good things to say about them. Seek out partner testimonials and find out what current clients have to say about their Salesforce services.



SECTION FIVE

Partner for success today

There are a huge number of reasons why you might want to outsource development of new Salesforce capabilities to a partner – but making the decision to bring someone in is just the start of the journey.

From there, you need to make informed choices at every stage to ensure you end up with exactly what your business needs.

Ultimately, everyone wants the same thing:

An expert partner that knows the platform, has fresh and innovative ideas, can be trusted to deliver great results, and does whatever it takes to deliver the best outcome for the business.



“First and foremost, a partner needs rock solid knowledge of the Salesforce platform – so accreditation is key. **But they also need to be a good cultural fit for us**, reliably deliver what we need, and ultimately, be people we enjoy working with on a personal level.”

JULIAN HERBERT, EVEREST GROUP



Outsourced Salesforce developers that tick all those boxes are few and far between, but you can find them if you:



We're Desynit. **We can help.**

At Desynit, we specialise in Salesforce development and implementation. We help clients of all sizes push the platform to its boundaries, create powerful new capabilities, and drive more value from the Salesforce Platform. Whether you want to build specific new functionality into Salesforce or just improve user experiences, we can help.

If you've got a Salesforce development project in mind – whether it's something you're ready to move forward with immediately, or a new idea that needs a little extra guidance – we'd love to hear about it.

Get in touch with **Gary McGeorge** for an initial chat at: **gary.mcgeorge@desynit.com** and find out why we might just be the perfect Salesforce development partner for your business.



Get in touch with
Gary McGeorge:



Tel: 0117 373 6784

Mob: 07974 568 538

gary.mcgeorge@desynit.com

