



# How to Select a Managed Services Partner for Your FinancialForce?





# Run Your Front and Back Office on the Salesforce Platform

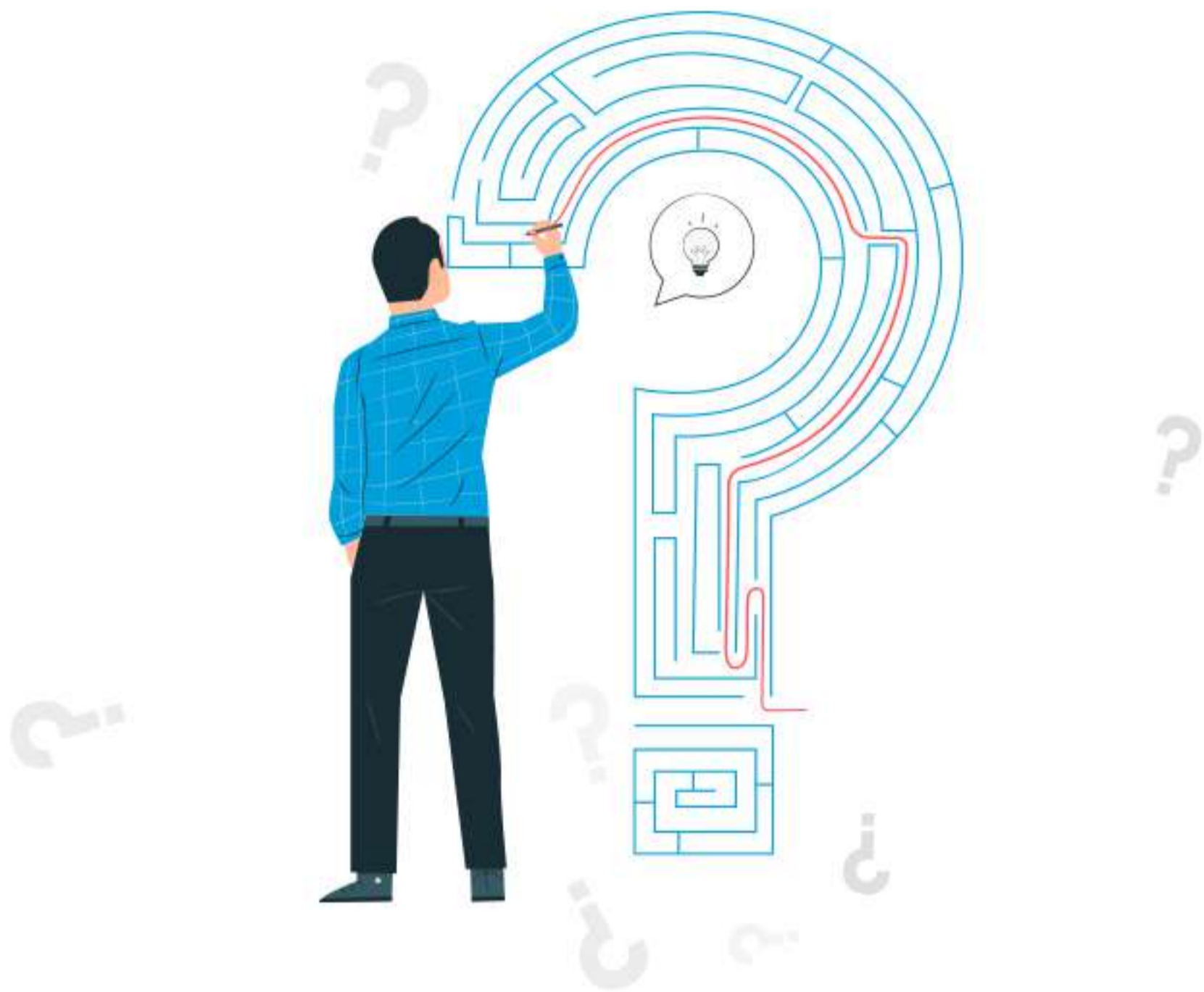


When you organize your sales, services, and finances around the customer, you will have clear processes, full visibility, and the ability to act remotely. This benefits all stakeholders, including employees, business leaders, and IT.

***Have you ever come across a dilemma when hiring a FinancialForce consultant to manage your FinancialForce? With hundreds of consulting partners to choose from, how can you know which one will be the best fit for your business?***

If you are one such FinancialForce user. You are not alone. This whitepaper brings you a detailed list of questions and solutions that can be your personal guide in choosing the right FinancialForce consulting partner. In this whitepaper, we are sharing answers to some commonly asked questions to help you choose the right FinancialForce consulting partner for your PSA/ERP. A FinancialForce consulting partner who understands your vision and helps you achieve your goal faster. Let us find out now





## FAQ #1

### What are the benefits of choosing FinancialForce Managed Services?

When you work with a FinancialForce Managed Services partner, you benefit from the expertise and numerous services that you would be unable to provide on your own. Many small and medium-sized businesses simply cannot afford to hire a full-time Salesforce expert; with managed services, you receive years of experience and expertise and on top of that save significant amounts of money within a consistent and predictable budget. By taking care of the issues you don't have time for, they allow your teams to focus on their strengths, business and clients.

## FAQ #2

### Do they specialize in FinancialForce?

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## FAQ #3

### Do they offer competitive subscription pricing?

Many managed service partners will try to close a deal by offering a low starting rate with inexperienced resources, then declare that all other services are "project work," which generally requires a much higher per hour rate to obtain any real results. Always make sure the price you're quoted includes both the consultations you'll need from the architect as well as the technical expertise needed to keep FinancialForce running correctly and following best practices.





## FAQ #4

### Does your agreement include anything beyond resource time/effort?

Some FinancialForce Managed Services are nothing more than just prepaid time blocks for technical resources. Beyond direct FinancialForce technical support, you should ask if there are any other services/benefits to working with them. Will they follow best practices for executing your request or will they only blindly execute your request? Do they offer training? Does it cover both strategic planning and tactical execution? Do they provide free software? Does the company offer backup services? Compare apples to apples when comparing multiple FinancialForce partners.

### Pro-Tip

The mark of a good FinancialForce partner is their ability to ask you as many questions as you ask them; it demonstrates their curiosity, thoroughness, and commitment to service. To reap the benefits of partnering with a FinancialForce shop, you need to hire someone with expertise, perspective, and experience; hiring someone to take orders blindly can undermine many of the benefits.





## FAQ #5

### Are they deeply experienced in the FinancialForce ecosystem?

Some form of technical resources is available to every FinancialForce Managed Services team. With a team that not only knows FinancialForce, but also can advise you on things such as when to buy versus build, what's the right license mix, and how to buy from Salesforce, they will be able to make recommendations that can save you hundreds (or even thousands) each month.

You should ensure your primary contact is someone who understands FinancialForce completely so they can provide you with a holistic solution that best suits your needs.

## FAQ #6

### Is their customer facing team easy to work with?

Are you able to talk with a person when you need help resolving an issue? Some companies claim they have a 24/7/365 service desk, but they're actually just shunting your tickets offshore. These services are even less helpful than FinancialForce support.

Ensure that you can speak with a real expert that understands your system, has overlap during your business hours, and can come up with options ranging from simple declarative changes to advanced solutions.





## FAQ #7

### How big is the FinancialForce Managed Services team for your company and how big is your company for the FinancialForce Managed Services team?

Would you prefer to have your FinancialForce Managed Services team know all your team members by name, or will you be just one of hundreds or thousands of customers who don't know each other? Are you interested in a small, flexible team with a "get it done" attitude and less formal processes or do you want rigid processes, 24\*7 support and a large pool of technical resources that rotate in and out of your account. With the right-sized partner, you'll both be aligned and you'll get what you need in a way that works best for you. When you are looking for a professional company for your business, make sure they are the best fit for your company.

## FAQ #8

### What are the goals of your organization for this project? Do they align closely with mine?

Remember your days of group projects in grade school. Often, such projects were either a blessing or a curse depending on who you worked with: If your partners shared your vision, the project went smoothly (and maybe even fun to complete); if they had an entirely different vision, things quickly went awry. It is the same concept to work with Salesforce partners on system deployments. When you and your partner don't agree on the project objectives, you're more likely to run into problems that could delay or derail the project.





## FAQ #9

### What level of risk will be involved in this project?

To anticipate a project's needs and provide complete visibility, it is vital to identify potential vulnerabilities well in advance. If you hire a qualified FinancialForce consultant, they will work closely with you to identify possible risks, such as low adoption, a lack of support, etc., and explain how they will fix these to ensure a successful deployment. Any company that tells you your project will be completed "no problem" without identifying the risks is likely inexperienced, so don't believe the hype.

## FAQ #10

### Does your organization's culture closely align with mine?

Culture may seem a vague idea, but it's immensely important. Partnering can be a long-term relationship spanning multiple projects, so it's important to get along both on a business level and a personal level with your Salesforce partner. It is important to ask this question before working with a potential partner to see if their core values align with yours.





# LAST

## BUT NOT LEAST!!

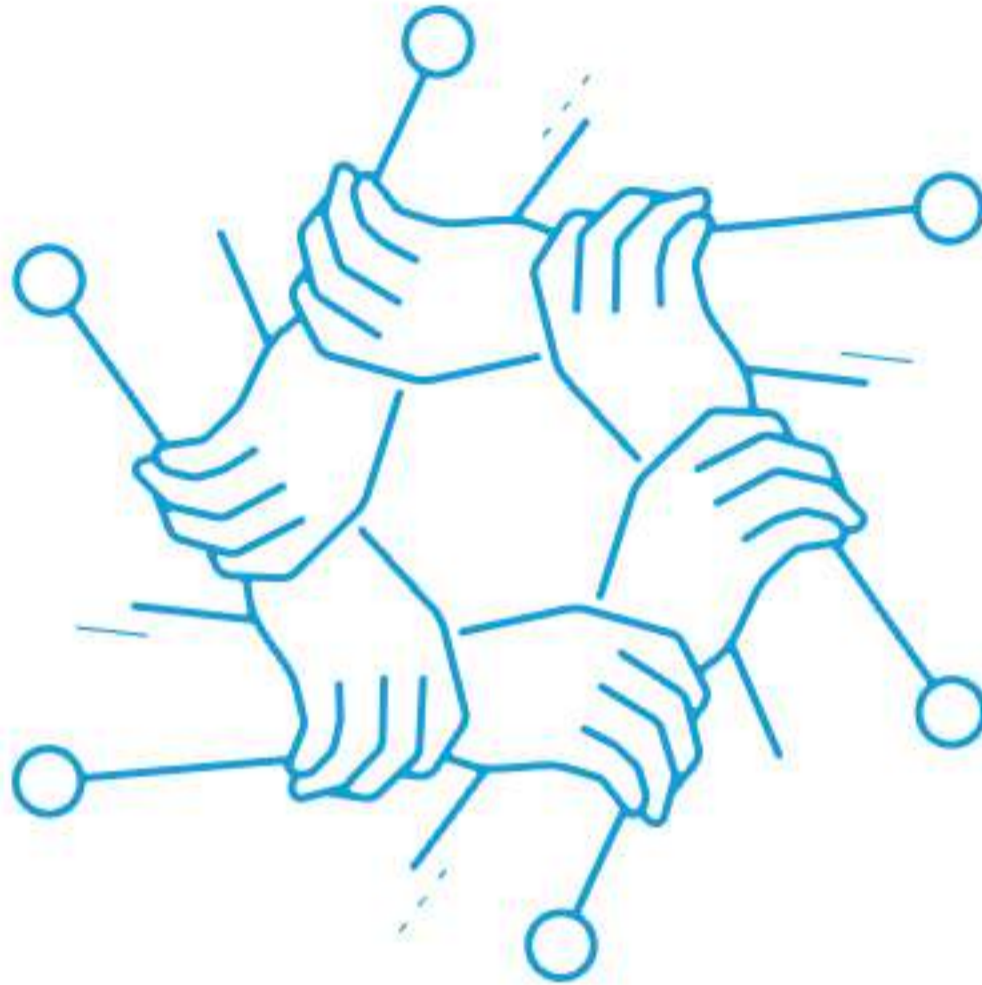
You might have noticed that we didn't ask whether your FinancialForce partner has worked with companies in your industry. Prior industry experience can be helpful, but also poses a risk of replication. Certain Salesforce partners will specialize in one industry and offer essentially the same implementation each time they work with a company in that industry. As a result, it does not only fail to meet the unique needs of each organization but also fails to move forward innovatively.

Choose firms that have worked with clients from a variety of industries and that are willing to try something new and innovative to differentiate themselves. In the end, the most important deciding factors are whether your FinancialForce partner's vision for the project closely aligns with your own and whether it can deliver on that vision.



# About the Company

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AblyPro is your FinancialForce managed service partner. We accelerate business growth with the only modern ERP suite and the #1 professional services automation (PSA), enabling real-time data insights and intelligent decision-making.

We are here to guide you about FinancialForce by streamlining and automating your financial management on Salesforce. We convert your business processes and requirements into a reliable, sensible, and usable PSA/ERP solution.

With 300+ Salesforce experts in our arsenal catering to FinancialForce PSA & ERP requirements, AblyPro thoroughly understands your business needs and empowers you to get more out of your investment.





## FinancialForce Expertise

Access AblyPro's pool of FinancialForce experts, ready to give you solutions tailored for your business and optimized for efficient financial management.



## No Surprise Cost

One predefined service package with no surprise or hidden monthly charges. AblyPro's truly affordable \$60\*per hour rate and agile-work methodology enable businesses to maximize their FinancialForce investment.



## Customized Team

AblyPro keeps your business requirements at the core of everything we do. We handpick our team of professionals equipped with the right skill-set to efficiently handle specific financial/revenue requirements, implement the industry-best practices and help your organization digitally transform.



## Reduced Overhead

Save big on company costs. With AblyPro's team of FinancialForce experts by your side, there is no need to retain and maintain highly-skilled professionals that often come with a huge "price-tag". Reduce overhead costs by choosing AblyPro.



# Disclaimer

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