HOW TO SELECT A TECH PARTNER

THE COMPLETE GUIDE

oshyn

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There are **over 11,000 martech solutions** on the market, and every year new software vendors arrive on the scene with exciting new solutions, integrations, services, and features.

In the case of digital experience platforms (DXP), there are dozens on the market—and plenty of good ones. According to the 2023 Gartner Magic Quadrant for Digital Experience Platforms, which recognizes 14 leading DXP solutions, there are four different solutions in the Leader Quadrant alone, and four more listed as Leaders or Challengers.

Deciding on the solution to power your digital transformation is painstaking enough. Then comes the next step: figuring out how to implement it. Generally, this is more a question of "who" rather than "how."

Implementing a solution on your own can be a Sisyphean struggle. And it can divert your internal resources from focusing on more strategic tasks that are core to your business. Rapidly-changing technologies means internal tech teams often struggle to keep pace with the demands of their marketing team. Plus, the sheer number of technologies available makes it extremely difficult for companies to maintain proficiency on these tools.

In short, you can't afford to sit on the sidelines just because you don't have the technical expertise in-house.

That's why today's leaders make the smart decision to bring in an expert solutions vendor to implement their digital transformation platform, be it Sitecore, Optimizely, Adobe, or one of the

other market-leading solutions. Plus, you need a partner with deep expertise in your chosen platform(s) to make sure you're reaping 100% of the benefits it has to offer.

In this guide we will cover how to go about selecting a technical partner you can trust to help you get the most out of your chosen platform. Partners come in all shapes and sizes, which can make it difficult to differentiate the pros from the amateurs. Read on, and we give you some pointers on what to expect from a partner, as well as a checklist of questions to ask when deciding on your next partner.

WHAT IS A TECH PARTNER?

By "tech partner" (aka "implementation partner", aka "development partner"), we are referring to a digital agency that can help you build, launch, and maintain your solution, whether that's a set of websites, a single page application, a mobile app, an ecommerce experience, or another component in your martech stack.

They are experts in implementing and integrating the components of your marketing technology stack that make it possible for your customers to have a good experience with your brand while your business teams get the data and control they need to keep your business healthy. These platforms typically include digital experience platforms (DXP) or content management systems (CMS), commerce, personalization, analytics, experience testing, customer relationship management (CRM) platforms, digital asset management (DAM), customer data platform (CDP), and so on.

WHEN DO YOU NEED A TECH PARTNER?

If you are experiencing any of the following situations with your digital experiences, you need a tech partner:

Your website is slow:

This is the most obvious symptom of an iffy implementation. If your internal team, vendor, or existing partner has done all it can to fix the problem and it persists, it's time to bring in an experienced partner.

Your experience is buggy:

If you implemented your platform on your own or hired a subpar partner, your deployment may have bugs, especially if it wasn't tested before deployment.

You need new features—or you're not able to launch new features fast enough:

You need new features or you're not able to launch new features fast enough: Once a site or app is up and running, you'll almost certainly need to add or adjust its capabilities. A tech partner who knows the platform can be focused on developing new features.

You have issues personalizing components:

If you can't handle personalization, it's better to talk to an implementation partner to help you configure your personalization rules and all the associated content.

You have editing and publishing problems, and your content is growing stale:

If you can't manage content on your own (due to a lack of personnel, a lack of training, or a buggy or misconfigured editor interface), you won't be able to deliver the right content to your customers. A partner can help you manage your content by providing knowledgeable staff or training your own staff to handle it on their own. If your editor interface is broken, a partner can fix it.

Your customers are complaining:

Your reputation is everything. If your customers have taken the time to let you know that they are having problems with your digital experience, you should pay close attention.

You don't have the expertise to conduct A/B testing:

A/B testing can have a bit of a learning curve. A knowledgeable partner can get you set up properly.

Your site has unplanned outages and you don't know why:

There's nothing worse than getting an email from your boss–or a customer–informing you that your site is down. You then have to make a mad scramble to get it working again. It's even worse when you don't know what caused it. A partner can help monitor for outages, troubleshoot, and prevent them from happening again.

You haven't taken full advantage of the features you paid for:

It's not uncommon for companies to buy a platform with all the bells and whistles. They start out filled with enthusiasm and ambition, but often don't end up having the bandwidth to do everything they want. This is where a knowledgeable partner can help.

Releasing new features requires downtime or weekend work:

If your release process isn't up to snuff, deploying enhancements can be painful. There's really no reason a deployment should require downtime for more than a few minutes at most.

You don't have an Architecture Document:

This is really a failure of planning, and can cause problems like many of those listed above. If you're just getting started, this document is fundamental because it spells every detail about your implementation about how content will look and how it will be structured.

Your platform isn't a good match for your business:

If you're having trouble doing what you need to do for your business, you may simply be on the wrong platform. Many of the afore-mentioned symptoms can be the result of a bad fit. Having a partner that understands your business goals is vital to delivering personalized and unique digital experiences on the solution that's best for your situation.

WHAT TO EXPECT FROM A GREAT PARTNER

Tech partners aren't all the same, and it can be difficult to differentiate the wheat from the chaff—and believe us, there's chaff. Finding your perfect implementation partner is serious business. You are committing sizable time and resources to a project that will greatly impact your company's future, and you want to get it right.

Like any relationship, a trusted partnership is built on a foundation of trust and communication.

A GREAT PARTNER WILL:

Take the time to understand your business:
It's vital for a partner to put themselves in your shoes and fully comprehend what's important to your business. They will do the research and ask thoughtful questions.

Have a complete understanding of your platform's ecosystem:
For example, if you are implementing a DXP solution, your implementation partner should be recognized and certified by the DXP vendor to guide you through the entire project lifecycle. However, you shouldn't just settle for a company with a massive portfolio but rather one that understands your business needs and can guide you towards the best solution.

Have knowledgeable experts on staff:
If your partner is implementing your solution for you, they better have experts on staff. That includes developers, technical architects, business analysts, project managers, and QA engineers.

Help you establish the balance between budget and value:
Unless you have an unlimited budget, there will be trade-offs. A great partner will help you prioritize and make decisions on the aspects of your project that will have the most bang for the buck.

Provide training and documentation:
A great implementer will have training resources, materials, and blog content related to the solution.

Practice proactive risk management:

Having strategies and procedures that help in mitigating risks and solving problems is a hallmark of a good partner.

Establish a clear plan:

From the get-go, an effective partner will have laid out procedures for performing an audit to understand your business goals and identify your IT strengths and weaknesses. This will inform them on a clear line of action on the best solutions to have and what steps to take.
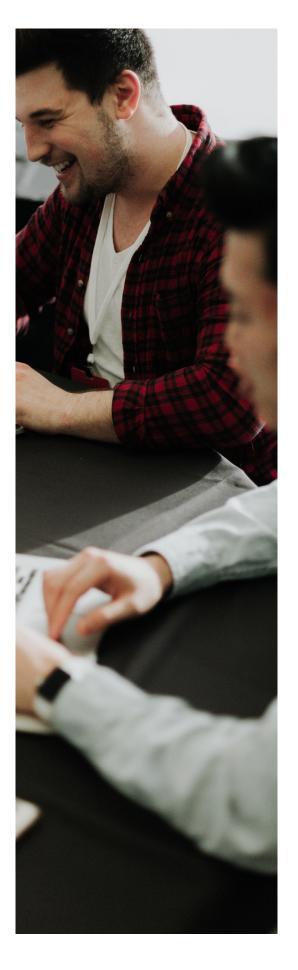
Provide a plan to improve the solution over time:

Once your solution is launched, there will inevitably be things that can be done to improve its effectiveness. A great partner will be transparent from the start about the current shortcomings of the system and commit to addressing them. Beyond shortcomings, you will discover features or functionality that is missing or can be improved, and a partner can solve those for you.

A GREAT PARTNER WILL NOT:

Put your brand's long-term vision at risk:

Some implementation partners may not care about your company's long-term growth, only its short-term prospects. This can substantially hamper your business as it scales in the future. Identifying partners that align with your short and long-term vision and goals is crucial.

Put in custom functionality that makes it more difficult to upgrade:

Every solution must be scalable and upgradeable. If not, you can be stuck with a custom solution that can limit your business' future growth.

Expect the first launch to be the last:

An implementation process does not end with the first launch. For this reason, the best partner will be the one that guarantees support even after the deployment; implementing upgrades, providing support and training, monitoring performance, and ultimately ensuring the project's success.

Lack tools for monitoring and controlling quality over time:

Ensuring the utmost quality in an IT infrastructure should be a priority. For this reason, they should have the right tools and software to track performance and proffer solutions that help to maintain quality over time.

Ignore best practices:

great partner won't just build a solution for the sake of it. They should follow the best practices to ensure you have a scalable, flexible, and reliable platform. Following these practices will help you take your product to market faster, simplify implementation, and make it more reliable.

Fail to inform customers of potential dead ends and trouble spots:

The implementer may discover technical debts or potential problem spots without informing you during a technical audit or maintenance. Failing to do so will result in future problems that may be quite challenging to solve.

KEY CONSIDERATIONS

Let's dig in a little more and take a look at five key things to consider as you evaluate potential partners.

1. DO THEY SPECIALIZE IN YOUR TECHNOLOGY PLATFORM(S)?

By their nature, marketing technology platforms are complex. That's what makes them so powerful. Inexperienced developers can't just take a few hours of coding lessons and be caught up to speed.

As an example, an organization could be hosting hundreds of websites on one implementation, translated in 10+ different languages, representing tens of thousands of products, with numerous contributors publishing. There are myriad considerations in terms of architecture, orchestration, scalability, maintainability and implementation. You need a partner that's "been there, done that" before.

Look at it this way: You wouldn't let a general practitioner perform heart surgery on you. You should only consider partnering with firms that specialize in your platform and have completed a substantial number of successful implementations.

Let's say you've decided on Sitecore as your DXP platform. You want to start researching potential partners by seeing what others say about them. You can check out online reviews like on Clutch.co, where you can find the top-reviewed Sitecore firms (Clutch.co is an excellent resource for finding the best vendors for any DXP, including Optimizely, Adobe, and others.) Beyond that, ask for references. It can be very helpful to talk to real customers who have gone through what you're about to embark on.

In addition to asking customers, it can be very helpful to ask the software vendors themselves. They have experience with a wide range of service providers and can provide informed recommendations of agencies that have performed well for others.

As you compare these firms, be wary of those that claim to specialize in any and everything. As the saying goes, "Jack of all trades, master of none." You'll get the best results from a firm that focuses on a handful of core competencies and has the rave reviews to back it up.

An important note here: Size doesn't matter. It's not about throwing bodies at the problem. It's about having the right team of experts who are hyper-engaged in ensuring your success. You likely won't have a team larger than 10 people anyway so making sure it's the RIGHT 10 people is crucial.

2. ARE THEY COLLABORATIVE, FLEXIBLE, AND EAGER TO PLEASE?

This is where reviews come into play. A good review will be more than just "These guys are great." If a client really valued its relationship with their digital transformation partner, their review will speak as much to the working experience as the end result.

You're looking for compatibility and alignment — a partner who shares the same values as your organization. Dig deep into the reviews, combing for words like "collaborative," "team work," "customer service," "flexibility," "commitment" and "follow-through."

If your partner isn't aligned with your values, the deliverable will suffer.

Bonus tip: Most firms will have their company values listed somewhere on their website. Familiarize yourself with those and ask your potential partner about them. It's a great way to dig a bit below the surface into how they conduct business.

3. DO THEY PLAY WELL WITH OTHERS?

A project's success hinges not only on a vendor's compatibility with your organization, but their compatibility with the other vendors you're working with. You want a partner who is laser-focused on executing the implementation you hired them to deliver, not on padding their SOW by stealing business away from your other vendors.

It's not uncommon to encounter web development firms who also have a design and strategy practice. Often, it's a big part of their top-line revenue. If a prospective vendor has additional services listed on their website — particularly if you already have a vendor you like working with — proceed with caution. The last

thing you need is a partner who might sabotage parts of your project or your vendor relationships, in the hopes of stealing future work away.

A digital transformation partner who has your best interests in mind will be happy to work closely with your other vendors. They'll go out of their way to integrate their workflows with your design partner, so they can ensure deliverables efficiently and save you the hassle of playing project manager. To find this type of partner, look for reviews from other agencies they've worked with, or ask to see case studies of their successful collaborations.

Ultimately, it can actually be a good strategy to use multiple vendors, particularly **those who specialize**. They keep each other accountable and typically perform better in their respective specialty.

4. DO THEY SWEAT THE SMALL STUFF?

If you're in the midst of a digital transformation, you've probably put many hours into reviewing and approving processes, functionality, look-and-feel, and more. After all that work, if something looks "off," it can be incredibly aggravating.

Still, you don't want to have to micromanage developers to make sure their work is acceptable.

An expert digital transformation partner can make the ultimate product look exactly like your design and will test the hell out of it to ensure the site looks and performs exactly as expected. They'll also be able to counsel your design partner if something in their design could be problematic in implementation, so you can course-correct before issues arise.

It's also a good idea to request an example of an initial design comp with a link to the final website. Compare the comp with the final to see how well they match up.

5. ARE THEY JUST A CODE FACTORY OR TRUE CRAFTSPEOPLE?

With the large enterprise websites that are typical of DXP projects, everything you build has to scale and integrate with what was built before and what will come after. The developer must consider the context, because a new website leverages and affects everything else.

Some companies that offer implementation services slap together poorly coordinated teams of contractors distributed around the globe to churn out the code required for your specific project as fast and as cheaply as possible. These types of shops don't care about the big picture, the long-term sustainability of the code, or the client relationship.

You'll get better results from a team of true experts who will take the time to understand the context, and architect a solution based on the best practices for your chosen tech stack. If you want a website that seamlessly scales, and will be performant now and into the future, you can't take an assembly-line approach—martech solutions are just too complex.

You need a closely knit team that collaborates together every day, knows how to hash things out, and has produced outstanding results together for a long time.

PARTNER EVALUATION CHECKLIST

To make it easier to suss out the true nature of any potential implementation partner, we created the checklist below. It provides a full range of questions that you should ask a prospective partner to determine if they are a good fit for your company and your project.

COMPETENCY

The following questions focus on exploring more about the partner and their team. Asking these questions will allow you to understand their experience and capabilities.

	How many years of experience do you have in the platform? While decades of experience do not guarantee a proper implementation, working with someone experienced with the platform does guarantee that they know the system, its history, and its workarounds.
	How well do you know this solution and its associated software?

	How much of your time is spent doing work on this platform?
	How many projects have you completed?
	Many agencies who work with one platform also work with others. What other technologies do you work with?

	Does your team include platform-certified architects, developers, and support engineers? When choosing a partner, make sure that they have relevant certifications in your platform and related platforms or programming languages. Certifications ensure that your partner knows the processes behind the platform.
	What certifications do your team members have?

Where can I find reviews of your agency?

Reviews not only show that clients are not only satisfied with that particular partner but also that they are reliable and work well. If your partner is reluctant to share reviews or doesn't have any, it might be a red flag.

Can you share case studies?

Just like reviews and examples, case studies show how that particular partner solved issues similar to yours. When reading a case study, don't rely too much on the marketing speech. Instead, look for evidence. Read the testimonials and try to connect on LinkedIn with the people you see there and ask them how things were. Some partners will write fraudulent or misleading testimonials.

Are there a few former clients, other partners, and platform vendors you've worked with that are willing to act as references?

Don't be afraid to ask for references from other companies about the partners you're shortlisting. Ask the partner itself for a list of references or people you could talk to about their implementation process. Browse through those companies' websites and see for yourself how well those sites perform.

Do you offer strategy and design services?

Some agencies focus only on the technology side and primarily offer development services. Others offer both strategy consulting and design services to their clients. This is an important question to ask as it aids you in shortlisting potential partners depending on if you already have a design team and strategy in place.

Do you have an example you can share with me of an initial design comp and the final website?

Asking your partner to show you examples of work they did for previous projects is fundamental. Never strike a partnership with a development agency whose work you haven't seen for yourself.

HOW THEY WORK

Now, you can move on to discover your potential partner's work processes. This helps you find out if they're compatible with your expectations.

Do you hire freelance contractors or offshore resources?

Contracting labor can be a good idea. It allows you to find talent in other areas of the world, but outsourcing tasks can run into several issues. It may result in a lack of quality or implementation delays. Some partners will purposefully contract freelancers to cut costs without thinking of the end-results.

Who do you work with? What are your hiring practices?

If you outsource resources, what are the backgrounds of those resources?

Does your staff work remotely?

Remote work is the new normal. Your partner should be well-equipped for an increasingly globalized world. This includes the ability to work with clients around the world.

What time zone(s) is your staff in?

How do you ensure you know our needs and business goals?

Implementation is one thing, but to implement a successful solution you will need a partner that is capable of articulating your business' goals and needs. A partner that only offers you technical support will always fall short. To prevent that situation, ask about how they work with a client's goals and make sure that they are met.

Do you have a rollout plan?

Creating a thorough rollout plan is fundamental to any implementation. It is the core of all preparation activities and necessary for rolling out new systems. A rollout plan lets both end users have a clear plan to follow when implementing the solution. If your partner isn't offering you a rollout plan or an implementation roadmap, be careful of where they might be taking you.

How do you collaborate with external teams?

Implementation doesn't happen in a vacuum. Your partners will likely have to work with your internal team and other stakeholders. Assessing how well a partner or an implementation agency collaborates both with your own team and other external stakeholders you partner with is fundamental to knowing if this particular one will play well with the rest of your team.

Will we be talking to and working with the same team throughout this process? How often will these people communicate with us?

Which team member will understand our business objectives and digital marketing goals, and ensure the solution meets these needs?

How can I monitor progress?

Transparency is very important in understanding a project's status at any given time, so adjustments can be made before it's too late.

Are there regular status meetings?

Are there any tools or reports that can provide additional information?

During the project, how will you handle unexpected changes in business needs or implementation challenges?

How flexible will you be if I need to make changes in my requirements mid-stream?

What is the process for changes?

How do you maintain accountability for changes?

What type of quality control processes do you follow?

You will want to know if your partner follows clear quality control processes in order to know that their software will be delivered on time with few bugs.

	How does your team make sure they create code without introducing security vulnera-bilities?
	How does your team make sure issues don't get introduced each release?

	How quickly can you get new features out to production? This speaks to the partner's ability to deliver as well as to the processes they have in place to ensure quick deployments.
	Do you have pre-built libraries or templates that can help you speed up the work?
	What deployment tools or processes do you use to release new builds?

	What types of documentation will be created? Just like quality control, documentation is a must for proper implementation. It ensures that you have a set of written processes and procedures to fall back on in order to understand how your solution works and how to use it.

	Do you provide training? Describe how you will enable our staff to work with the new solution.

POST-LAUNCH SUPPORT

Having support available after launch can be just as important as the launch itself. Your team will likely have questions on how to get the most from the platform. Plus, sophisticated systems always need maintenance, improvements, and optimizations.

	Do you have experience maintaining the platform after launch? What can I expect from your team if I need help after the project is completed?

	My new system has empowered me with many new capabilities. Can you help me optimize these features so that I may better achieve my business goals? Do you have services that can help us get the most from the platform once we start using it?

	Can you make help me be aware when there are issues with my solution?
	Can you proactively keep me safe and up to date?
	Are you able to keep me aware of software updates?
	Are you able to install security patches?

WRAP-UP

If you have the time for it, it's not a bad idea to start with a smaller commitment.

Test drive a partner with a smaller project or have them do an audit of your existing solution. An audit will help you get to know what they're like to work with and the partner will have a better understanding of your needs if you select them for further work. In the worst-case scenario, you find out you don't want to work with them, and you likely also learn something about your requirements by going through the audit process.

It's important to understand as much as possible about how a prospective partner will approach your project and whether they take pride in their work and care about building long-term relationships. If you aren't confident about their approach and the entire team you'll be working with, look for another vendor. Trust your gut and go explore your options.

ABOUT OSHYN

Oshyn partners with some of the best brands and creative agencies in the world to create exceptional digital marketing solutions. By providing services, technology, and platforms that enhance an agency's offerings, we enable creative talent to focus on what it does best: creating amazing work.

Over the last 20+ years Oshyn has earned a stellar reputation for delivering exceptional customer experiences via marketing technology. We've worked with top brands including NW Natural, Point B, Arkansas Children's Hospital, Skyworks, Promedica, ALS Global, DMC Global, Minor Hotels, Dole, UMass Global, Volkswagen, and Aetna. And we've partnered with top creative talent like Sapient-Razorfish, Crispin Porter + Bogusky, 72andSunny, and many more.

Our unique application of proven processes, best-in-class technology, and deep expertise delivers memorable brand experiences and expands and enhances agency capabilities.

Oshyn is a Sitecore, Adobe, and Optimizely partner.

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