

2026 RFP Checklist: 5 Important Questions to Ask Before You Outsource Salesforce Integration Services

Hey there!

Assuming that you are reading this, you are probably at a crossroads. You have heard all about Salesforce being the engine that can help your business to grow to amazing heights, but you have also heard that the engine is just as good as the mechanic who tunes it.

By the year 2026, there had been a shift in the CRM environment. It is no longer about establishing software but rather about AI interventions, information alignment, and designing smooth customer experiences. Identifying the appropriate [Salesforce Integration Partner](#) is the best decision you will make this year. To make your life easy, we have compiled a friendly RFP (Request for Proposal) checklist with the five most important questions you should ask.

1. What is your approach to Data Cloud and AI integration?

Salesforce is not only a database in 2026 but also an AI force. Your partner is not supposed to talk of simple work processes. Get them to tell you how they intend to use Salesforce integration services in order to consolidate your data. They could be in 2022! Summing up, they are not discussing Data Cloud or Agentforce.

2. What is your industry experience?

A secret sauce is unique to every industry. A retail environment is not at all similar to a healthcare implementation. You need a Salesforce Integration Partner that speaks your language and knows what is unique to you in terms of pain points. Request the case studies to reflect your business model because they may not be learning on their own.

3. How do you support your post-deployment?

The date when the system goes live is only the initial phase. The worst thing that companies commit is recruiting a team that will vanish after the signing of the contract. Ask what services they are managing and how they manage updates, bug fixes, and training of users. You need someone who is by your side in the trenches.

4. How are you going to guarantee user adoption?

The most expensive CRM in the world can be purchased, but in case your team does not use it, your ROI will be zero. Inquire of the potential partners on how they are managing change. An excellent companion is not only about code but also about the individuals who would be using the tech.

5. What is your scalability methodology?

Two years will not see your business the same. Does the solution that they are designing accommodate flexibility? The [Salesforce Integration services](#) partner needs to be designing a system that will be expandable as you grow, without any need to incur a technical debt that will cost you a fortune to remediate down the line.

Wrapping Up

Making a big decision on who to connect with is not something to be afraid of. It is all about the search for a team that can listen rather than speak. Asking these five questions, you will find out fast who is a vendor and who is a real collaborator.

Are you willing to change your business? Don't settle for average. Find a group that will make your objectives theirs.

Happy hunting!

Looking for assistance with Salesforce integrations?

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