



# How to Create an Effective Data Sheet

To be shared with Salesforce teams and external clients:

- ☐ Begin with the overview of your company. Use an introductory paragraph on the services your company provides. Please limit this section to 1,000 characters.
- ☐ Go into your value proposition. From here target no more than 300 characters, and focus on what makes you a unique partner. Working with Salesforce does not make you unique, because all of our partners work with Salesforce.
- ☐ Use three to five bullet points to communicate the assets that differentiate your company from competitors. Again, working with Salesforce is not a differentiator.
- ☐ Include a contact name, phone number and email address. This contact could be a Partner Manager, HubExchange Manager, Alliances & Strategy Manager, etc.
- ☐ When thinking about showcasing your expertise, do so through your approved client logos. You may want to include between three and eight logos. Next to each client logo, you may want to include bullets regarding the Business Challenge, Industry, Solutions and Integration.
- ☐ Make sure to include your company's logo so that it stands out above your client logos.
- ☐ List your primary industry or industries. Only one is recommended. More than three will make it hard to differentiate you for your industry expertise. Samples may include Retail and eCommerce, Travel and Hospitality, Financial Services, Media and Entertainment, CPG Solutions, Technology (B2B), Business Services, or Other.
- ☐ List the country or countries in which your company operates and the location of your headquarters.
- ☐ List your Salesforce partner program(s).
- ☐ List your website URL or shortened URL to overview.

When creating a version **only for the internal Salesforce team**, be sure to add the following items in combination with the previous list in order to make your data stand out to the sales teams:

- ☐ Next to the client logos, list as many of the following items that make sense:
  - ☐ Length of close time
  - ☐ The internal team you worked with (for reference)
  - ☐ Products involved in the deal
- ☐ If you sourced the deal, list that.