



BUYER'S CHECKLIST

10 questions to ask before hiring a monday.com implementation partner

With the red flags to watch for.



 **RED FLAGS**

Prepared by **Workiflow** — monday.com Platinum Partner & CRM Specialist.

Why this checklist exists

Every partner on your shortlist says the same three things: **certified, experienced, results-driven**. That's not a differentiator — it's the minimum bar.

This is the checklist we'd hand a friend choosing a monday.com consultant: 10 questions, what a strong answer sounds like, and the red-flag answer that should send you back to the shortlist.

PRINT IT. BRING IT TO THE CALL.



The 10 questions

AT A GLANCE



/01 Are you a Platinum Partner — and what does that mean for my build?

/02 How deep does your team's certification go, beyond the sales badge?

/03 Is your AI and automation expertise in-house, or outsourced?

/04 Can you show me real client outcomes, not just testimonials?

/05 What does discovery look like before you touch my account?

/06 Who owns my system after launch, day-to-day?

/07 What happens when I need something built after go-live?

/08 How do you handle industries with compliance or complexity needs?

/09 Will I have one point of contact, or a full team?

/10 What's the real timeline — and what could make it slip?

Are you a Platinum Partner — and what does that actually mean for my build?



GOOD ANSWER

“Platinum gives us direct access to monday.com's product and engineering teams, earlier visibility into new features, and vetting for multi-board architecture and custom API work most partners haven't earned.”



RED FLAG

“We're monday-certified” — followed by silence when you ask what tier, what it unlocks, or how long they've held it.

WHY IT MATTERS

Platinum is the highest tier in the monday.com partner program. It requires sustained client satisfaction scores, deep technical certification, and proven experience with complex builds — not just a logo on a website.

How deep does your team's certification go, beyond the sales badge?



GOOD ANSWER

“Here's how many of our implementation specialists hold platform and API certifications — and here's who specifically would be assigned to your project.”



RED FLAG

Only the founder or account manager on the call holds any certification. The people who'll actually build your system are unnamed, junior, or outsourced.

WHY IT MATTERS

A partner logo tells you the company qualified. It doesn't tell you who's actually going to be in your account building your workflows.

Do you have in-house AI and automation expertise, or do you outsource it?



GOOD ANSWER

A specific automation they built recently, the problem it solved, and how it applies to your use case — not a generic capability claim.



RED FLAG

“AI-powered solutions” repeated more than once — with zero concrete example when you ask “like what?”

WHY IT MATTERS

monday.com's AI tools are evolving fast. A partner without dedicated AI capability is guessing at the same pace you are — and charging you to learn on your account.

Can you show me real client outcomes, not just testimonials?



GOOD ANSWER

Specific figures: hours reclaimed, error rates dropped, revenue recovered. One Workflow-built system helped a global mobility firm triple its caseload and cut invoicing time by 90% — without adding headcount.



RED FLAG

“Clients love working with us!” with no metric attached — or metrics that match every other case study on their site, word for word.

WHY IT MATTERS

Testimonials are easy to collect. Numbers are not. A partner confident in their work will hand over metrics without hesitation.

What does your discovery process look like before you touch my account?



GOOD ANSWER

A described process: workflow documentation, stakeholder interviews, and testing against your real scenarios instead of theoretical demos.



RED FLAG

They skip straight to pricing and go-live dates without asking a single question about how your team currently works.

WHY IT MATTERS

If a partner starts talking about build timelines before understanding your actual workflow, you're getting a template — not a system.

Who owns my system after launch, day-to-day?



GOOD ANSWER

A named point of contact, a defined support structure, and clarity on what happens the week after launch.



RED FLAG

“You'll get documentation” — and nothing else. No named contact, no defined support window, no plan for adoption.

WHY IT MATTERS

This is where a lot of implementation partners quietly disappear. The system you paid for needs someone accountable after go-live — or it degrades within months.

What happens when I need something built after go-live?



GOOD ANSWER

A clear model — retainer, project-based, or dedicated hours — with a defined process for scoping new requests.



RED FLAG

“Just reach out anytime,” with no structure behind it. Vague availability isn't a support plan.

WHY IT MATTERS

Your workflow will change — new hires, new departments, new tools. You shouldn't have to re-shop for a partner every time your business grows into a new need.

How do you handle industries with specific compliance or complexity needs?



GOOD ANSWER

Specific prior examples in complex or regulated environments, and how their approach differs for those builds.



RED FLAG

"We can figure it out," with no examples. That's a lesson they'll learn on your account, on your timeline.

WHY IT MATTERS

In healthcare, finance, or any regulated space, generic implementation experience isn't enough. Data structure, permissions, and reporting all change when compliance is on the line.

What's your team structure? Will I have one point of contact or a full team?



GOOD ANSWER

A described team — strategists, automation engineers, developers, project managers — coordinated around your build, not routed through one person.



RED FLAG

One freelancer is your entire point of contact — and there's no backup if they're unavailable mid-project.

WHY IT MATTERS

A single generalist can build you a board. A full team can architect a system, automate it, integrate your stack, and train your people — without a single point of failure.

What's the real timeline — and what could make it slip?



GOOD ANSWER

A stage-by-stage walkthrough, plus the specific dependencies — your data, stakeholder availability, scope — that could shift the date.



RED FLAG

A confident number with zero context. A date with no explanation is a sales tactic, not a plan.

WHY IT MATTERS

Every proposal has a timeline. Few explain what actually causes delays — and that gap is where projects blow past deadline without warning.

The real filter

None of these 10 questions can be answered with a badge, a logo, or a line about “innovative solutions.” They require a partner to talk **specifics**.



Silver → Platinum

One of a small handful worldwide to jump straight from Silver to Platinum, skipping a tier entirely.



A 50+ person team

Strategists, automation engineers, developers, and AI specialists — not a single freelancer with a badge.



We stay past launch

Because a system nobody maintains is a system that quietly falls apart by month three.



Put us through all 10.

You don't need to build a rocket ship. You just need a partner who can answer every one of these questions without flinching. Bring the checklist — we'll bring the specifics.

Book a free 30-min call →