Salesforce PRM (Partner Relationship Management) - Interview Guide & Mastery Handbook

# 📚 Overview

Salesforce PRM enables companies to manage their indirect sales channels such as resellers, distributors, agents, or partners through a branded Experience Cloud site. PRM improves collaboration, lead management, onboarding, training, and partner performance tracking.

# 🔹 Key PRM Concepts & Definitions

Partner Account: A Business Account that is enabled as a partner organization.

Partner User: A user under a Partner Account accessing the PRM portal.

Partner Role: Assigned via role hierarchy to enable record sharing (e.g., Partner Executive > Partner Manager > Partner User).

Partner Profile: Salesforce Profile tailored for partner access, with specific object permissions (usually paired with Partner Community License).

Deal Registration: Mechanism for partners to register a potential sale and gain visibility/protection on the opportunity.

Lead Distribution: Internal users assign leads to partners for follow-up. Done via manual assignment, queues, or automated flows.

MDF (Marketing Development Funds): Funds granted to partners by vendors to support co-marketing activities. Partners request, track usage, and submit proof of execution.

# 🌟 Interview Questions & Answers

(See full document for question and answer format.)

# 🏢 Technical Implementation Tips

(See full document for partner roles, profiles, sharing, and automation logic.)

# 🧭 Exploring PRM in a Production Org

1. Partner Role Hierarchy: Check Setup > Roles and ensure each Partner Account has a unique hierarchy.

2. Partner User Creation: Check Contacts > Enable Partner User. Verify Profile and License.

3. Data Access Controls: Ensure OWD is Private. Check Sharing Rules and Sets. Use debug logs for Apex sharing.

4. PRM Functionality Setup: Inspect Experience Cloud > Site details for partner branding and modules.

# 📈 Reports & Dashboards

Partner Performance by Tier, Deal Reg Win Rate, Lead Conversion by Partner, MDF Usage and ROI, Partner Onboarding Funnel

# 🏆 Learning Path

Trailhead modules, hands-on practice, and AppExchange exploration.

# 🏑 Hands-on Project Ideas

PRM Portal, Scorecard Dashboard, Lead Assignment Engine, MDF Workflow

# 💼 Resume Tip

Implemented Salesforce PRM for multi-tier partner channels including deal registration, MDF management, onboarding, and dashboards.

# 🧪 Mock Interview Case Study

Scenario involving PRM rollout for industrial equipment vendors with Distributor/Reseller structure.

# 📋 Project Blueprint

Phase-wise plan from Discovery to Deployment for a PRM implementation.

# 🖼️ Visual Summary Infographic

