PRECURSIVE

Partner vs. internal decision framework.

Decide which work stays with your team and which goes to partners, check what it really costs, and test the mix before the deal closes



HOW TO USE THIS FRAMEWORK

Four steps to a mix you chose.

Partners are part of how Delivery works now. The question isn't whether to use them, it's which work they should own and whether you can see how it's going.

This framework works at the workstream level, not the project level. A single implementation can include work you should always keep, work a partner can run well, and work that sits somewhere in between. Run each workstream you regularly sell through the four steps below, then use the planner on page 7 to record the result.

01

Map your workstreams.

List the recurring pieces of work in your services catalog: scoping, configuration, integrations, data migration, training, adoption.

02

Find the default owner.

Answer five questions for each workstream and place it on the decision matrix.

03

Check the real cost.

Compare a partner's rate with the effective cost of an internal hour at realistic utilization.

04

Pressure test before close.

Confirm capacity, skills, access and handovers while the deal is still open.

Who should use it: Delivery and Services leaders, with Sales, when building services catalogs, scoping deals or reviewing headcount requests.

STEP 02

Five questions for every workstream.

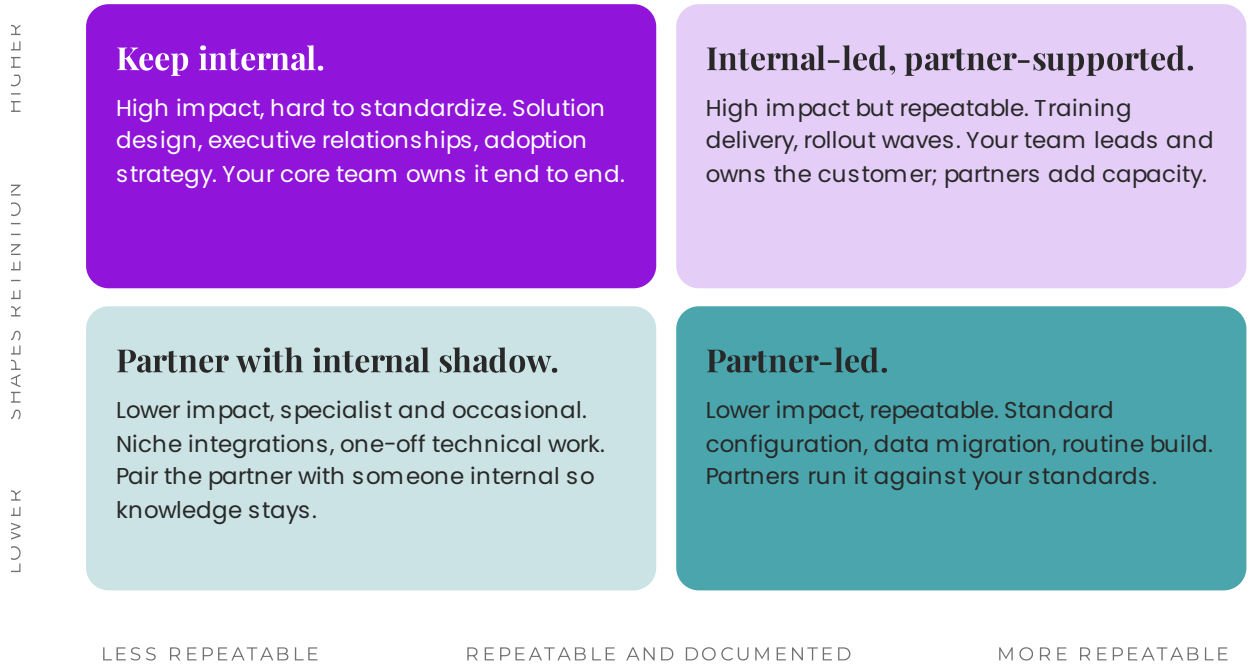
Answer each question honestly for the workstream in front of you. The answers point to a default owner. They are a starting point, not a rule: a strong partner relationship or a specialist already on your team can change the answer.

Question	If yes	If no
1. Does it shape retention? Solution design, executive relationships, adoption and value realization.	Keep it internal. This is where renewals are won or lost.	It can be partner-led if the other answers allow it.
2. Is it repeatable and well documented? Standard configuration, data migration, routine build work.	A strong partner candidate. Quality is easy to check against a known standard.	Keep closer control, or document it before handing it off.
3. Is the skill rare and the demand occasional? A skill you need on a few projects a year.	Use a partner, paired with someone internal so the knowledge stays.	Consider building the skill in-house.
4. Is it a customer moment? Kickoffs, go-lives, handovers to Customer Success.	Your team owns it, even if a partner did the build.	The partner can own it within an agreed plan.
5. Can you see it? Can you track partner effort, progress and quality alongside your own team?	You can scale partner involvement with confidence.	Fix visibility before you scale it.

> Question 5 is the gate. Partner work that falls short reflects on you, because your customer sees one team. If you can't see partner progress and quality until something goes wrong, the mix isn't ready to grow.

Place it on the decision matrix.

Questions 1 and 2 do most of the work. Plot each workstream by how much it shapes retention and how repeatable it is, then use questions 3 to 5 to confirm the placement.



Example placements.

Workstream	Default owner	Why
Solution design and scoping	Internal	Sets the expectations you'll be held to
Standard configuration	Partner-led	Repeatable, easy to quality-check
Specialist integrations	Partner with internal shadow	Rare skill, knowledge must transfer
Adoption and value realization	Internal	Directly drives retention

STEP 03

Check the real cost of an internal hour.

The usual objection to partners is that a partner hour costs more than an internal one. That's only true at full utilization. An internal hour also carries the cost of the time your team is paid but not billing.

> Effective internal cost per billable hour = loaded hourly cost ÷ billable utilization

SPI Research's 2026 benchmark put average billable utilization at 66.4% in 2025, the lowest in the benchmark's history and below the 75% SPI considers healthy.[1] At that level, every billable hour carries roughly 1.5 times its loaded cost.

Billable utilization	Effective cost per billable hour (loaded cost = 100)
80%	125
75%	133
66.4%	151
60%	167

Run the comparison for one workstream.

Internal	Partner
Loaded hourly cost	Agreed partner rate
Realistic utilization for this skill	Internal hours to manage the partner
Effective cost per billable hour	**Total cost per delivered hour**

Compare the two bottom lines, not salary against rate. Use the utilization you'd realistically get for this skill across a year, not your team average. A specialist needed on three projects a year will sit well below it.

1. SPI Research, 2026 Professional Services Maturity Benchmark, via Deltek's published summary. The cost table is arithmetic (100 ÷ utilization).

STEP 04

Pressure test the mix before the deal closes.

The best time to find a gap in your mix is while the deal is still open. Before a deal moves to close, Delivery and Sales should be able to tick every box below for each partner-owned workstream.

- [ ] **Capacity.** A named partner resource is available for the forecast start date, not just "a partner."
- [ ] **Skills.** The partner's team matches the specific skills the scope requires.
- [ ] **Margin.** The blended plan still hits your margin target once internal coordination time is included (Step 03).
- [ ] **Access.** Partners can reach what they need to deliver, and nothing they shouldn't see.
- [ ] **Expertise.** There's a defined route for partners to reach your internal experts. TSIA research found only 49% of organizations have a documented process for this.[2]
- [ ] **Handover.** It's clear who owns each customer-facing milestone.
- [ ] **Visibility.** You can see partner progress and quality alongside your own team, not only in status calls.
- [ ] **Knowledge capture.** You know what your team keeps when the partner rolls off.

> If any answer is "we'll figure it out," that's the risk you're signing up for. Flag it in the deal review, not after kickoff.

2. TSIA, partner enablement survey insights.

WORKSHEET

Blended delivery planner.

Record one workstream per row. Revisit it when your services catalog changes or a headcount request lands.

Workstream	Shapes retention? (H/L)	Repeatable? (Y/N)	Weeks a year needed	Default owner	Named partner	Visible? (Y/N)

BUILD IT WITH AI

Prefer a working version? Copy this prompt into the AI assistant you use.

> Act as a services operations analyst. Build a Blended Delivery Planner as a spreadsheet file, or as an interactive table if you can't create files. Use one row per workstream with these columns: Workstream; Shapes retention (High/Low); Repeatable and documented (Yes/No); Weeks a year the skill is needed; Default owner; Named partner; Partner visibility (Yes/No); Loaded hourly cost; Realistic utilization (%); Effective internal cost per billable hour; Partner hourly rate; Internal management cost per partner hour; Total partner cost per hour.
>
> Calculate Effective internal cost as Loaded hourly cost divided by Realistic utilization, and Total partner cost as Partner hourly rate plus Internal management cost. Set Default owner automatically: High and No = Keep internal; High and Yes = Internal-led, partner-supported; Low and No = Partner with internal shadow; Low and Yes = Partner-led.
>
> Use dropdowns for the High/Low and Yes/No columns. Highlight the lower of the two cost columns in each row, and flag any row that isn't Keep internal where Partner visibility is No. Add five example rows I can overwrite and a short instructions section explaining each column.

Before approving the next hire, ask.

Is it for baseline demand or a peak? If the work disappears in two quarters, the role becomes bench time. **How many weeks a year is the skill needed?** Well short of a full year points to a partner. **What's the effective cost at realistic utilization?** Compare it with the partner option from Step 03.

HOW PRECURSIVE HELPS

Run partners and your team as one plan.

This framework only works if partners sit in the same plan as everyone else. That's what our Partner Workspace is built for.

One workspace.

Invite implementation partners, systems integrators and contractors into a secure, branded portal to collaborate on co-delivery projects.

One resource plan.

Partners are set up as resources in Precursive and added to projects as participants, so they appear alongside your internal team.

Controlled access.

Set default project access levels by role, and give partners reports and dashboards inside the workspace.

Partner Workspace is built on Salesforce Experience Cloud, so your blended delivery plan lives where Sales and Delivery already work. You can see internal and partner capacity together while the deal is still open, which is exactly when Step 04 needs it.

See Partner Workspace in action

www.precursive.com

PRECURSIVE

Blended delivery isn't optional anymore.

Plan it on purpose

WWW.PRECURSIVE.COM