TO: Prospective Supplier

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DATE: December 10, 2020

RE: Request for Proposal #221-05
Salesforce CRM Software Implementation
ADDENDUM #3
· Updates (additions and deletions) to the original RFP
· GVSU responses to common vendor questions
· Updated project timeline

This addendum provides clarifying information to the original RFP

Updated project timeline that specifies the Salesforce implementer scope

GVSU RFP #221-05 Salesforce Addendum #3

I. Updates to the RFP

Page 3: Replace "Scope of purchase is contingent on approval of an anticipated SBA grant funding extension which will be known in March 2021" **with** "SBA grant funding extension through September, 2021, has been received. Scope of purchase is no longer contingent on that extension."

Page 3: Replace "In January, 2021, the vendor will recommend an array of platforms to complement Salesforce as a CRM solution" **with** "In January, 2021, the *UX vendor Peopledesign* will recommend an array digital platform to complement Salesforce as a CRM solution."

Page 8 - 9: Disregard all the original "Data Security & Data Access" questions and replace with the following:

Describe how cyber security is considered as a part of your proposed solution.

How does your solution prevent data loss and ensure data security during the migration to Salesforce from the legacy system? Describe your process for the transfer of data.

What are your processes as related to security breaches? How quickly will Michigan SBDC be notified of a data breach? What steps will be taken if confidential Michigan SBDC data is compromised?

Does your solution include on-going service as a managed-services-provider? If so, then what is your support ticket resolution time?

II. Responses to Common Vendor Questions:

Data Questions

Besides the legacy CRM, what other systems will be involved for importing the data? It has been determined that the only system requiring data migration is the legacy CRM system. There are two SBDC programs that currently operate out of other systems. These systems have a comparatively minor amount of data and no data interaction with the legacy CRM. Once an implementation vendor is selected, SBDC may explore options for expanding the scope of the project to include integration of these systems. Vendor proposals, however, should only include the single legacy CRM system.

What data will be imported from the legacy CRM? The majority of data imported from the legacy system is related to the "customer profile". The nature of this data may be seen on the image at this link: https://drive.google.com/file/d/1WHiJjz1A0WNA8cS6G1mq3io1XcQ7ReHQ/view?usp=sharing

What is the nature and volume of the legacy system data? Legacy system data includes the following:

- "Event Attendance records": 215,097
- "Centers" (ie. regional offices): 15
- "Customers" (ie. consulting clients + event attendees): 197,020
- "Clients" (ie. customers that have received one-on-one consulting): 71,396
- Number of Events: 23,495
- Impact records (validating that a client attributes economic impact, such as "new jobs" or "sales increase", to work with the SBDC): 22,336
- Member lead: 5,555
- Total "sessions": 747,373
- Users (active): 171
- Users (inactive): 821
- File attachments: 222,000 (134 GB)

How far back does the legacy system data go, and do you want all of it to be migrated and cleaned for the new system? Legacy CRM data dates back to 2002. An internal "Data Governance Workgroup" is currently determining how far back data needs to be retained for the new system. This will be at least 7 years, potentially more.

How will data be extracted from the legacy system? The data will be extracted and provided it in separate csv files (8 files + or - along with a data dictionary).

Is MI SBDC already utilizing Tableau or should responses include a full Tableau implementation and associated training? MI SBDC began using Tableau in fall, 2020. Integration of the tableau tool with Salesforce is required for the proposal. Inclusion of discovery and training related to the tool is optional to include in the proposal.

Are additional details available on the EDMIS quarterly reporting? Will this be a file generation with manual upload or an automatic integration? Additional details on EDMIS are available at this link: https://www.sba.gov/offices/headquarters/oed/resources/33381. We are seeking the recommendation of the implementation vendor as to whether a manual upload or API integration will be the most effective approach.

General Questions

Does SBDC have an allocated and approved budget for this effort? If yes, can you disclose it?
This project does have allocated and approved funds. The final budget will be determined once the scope is baselined in collaboration with the Salesforce implementation vendor. Budget of $300,000 has been approved for the "core" CRM implementation and product cost, including these areas:

- Implementation: system set-up, data migration, , EDMIS database API integration, user training, post-launch support
- Product solutions & licensing: Sales Cloud, data integration, event management, forms

Please note that the $300,000 allocation does not include the related areas listed below. These areas have a separate allocation of funds for products and implementation by another vendor:

- Marketing automation
- Client portal
- Learning Management System

As stated in the RFP, collaboration will be required between the Salesforce implementer and User-Experience vendor on the integration of these systems with Salesforce.

What number of Salesforce licenses are needed? Cost estimates should account for 170 licenses through September, 2021. License count will be reduced to 100 following September, 2021, due to a reduction in pandemic response staff.

Can you clarify the role between the Salesforce implementer and the UX vendor that is doing work with related digital tools? Michigan SBDC is working with Peopledesign to conduct a "digital alignment" of systems. Peopledesign will be responsible for the development and implementation of the following:

- Marketing automation tools (email marketing, etc.)
- Learning management system for on-demand content
- Client satisfaction survey tool
- Client portal

A recommendation of solutions for each of these areas will be available for input by the Salesforce implementer prior to platform decision making. The Salesforce implementer is *not* responsible for the implementation of these platforms, but will be responsible for the integration of these systems with Salesforce. Please indicate in your proposal the implication for any areas that are dependent on those platform decisions.

If you are able to provide a platform agnostic cost range quote for integration of these tools with Salesforce then please do so. Otherwise, GVSU will select vendor finalists in early January, share our suggested toolset in mid-January with the finalist, and ask finalists to review those toolsets for impact on their implementation”

Note that training registration solutions are *not* included in Peopledesign’s scope. A solution for event registration and management should be included in your proposal.

What is the timeline of the UX project in relation to the request? Will the chosen vendor have an influence in final product decisions and when will product decisions be made? The integration capabilities of chosen products may have a significant impact on the project timeline and budget. The UX platform implementation timeline is secondary to the CRM timeline. We expect core CRM solutions to be implemented first, with additional platform solutions (marketing, LMS, etc.) to be integrated with the CRM at a later phase.

What email system does Michigan SBDC use? As noted in the RFP, Michigan SBDC has a unique organizational structure that is spread across 10 autonomous host institutions, each with a unique IT infrastructure and email domain. Both Gmail and Outlook are utilized as email systems, depending on the host. Additionally, Michigan SBDC has a G Suite with the @michigansbdc.org domain that is used primarily for file collaboration with Google Drive. Gmail functionality is enabled but not utilized by staff for email communication.

The RFP references “User training and support that includes self-serve and live channels”. Is this for internal users? Or clients? How are you envisioning them to be able to use self-serve and live channels? What are live channels? Training is for internal staff.

Self serve channels include:

- Salesforce self-serve training and knowledge tools, including Trailhead
- Custom developed content for MI SBDC internal staff Learning Management System. This content covers the specifics of how Salesforce is used at SBDC (ex: data entry expectations, standardized reports, etc.)

Live channels include:

- During and immediately following implementation: professional live (chat and phone) support facilitated by the implementation vendor.
- Following implementation: Dedicated internal support resources including an #it-help-desk Slack channel, proficient “Salesforce Champions” on each team, and outreach to the system administrator.

The RFP mentions upfront implementation training. Can you clarify as to what training SBDC is looking to get upfront as opposed to at the end of the project? "Upfront" is referring to the initial training and support for staff when the new CRM system is introduced, as opposed to regular on-going training and support following the completion of the project. We are interested in proposed solutions for future on-going training and support, although this is not required for the proposal whereas "upfront" support and training must be included.

Does the solution require CTI (Computer Telephony Integration)? No.
How do you track client load? Is it simply the total number of clients per consultant? What are you envisioning to be able to do? Currently, Client load is based on active clients assigned to consultants, along with new inquiries from the website (ERFCs). There is no clear way to determine the variable consultant load of clients with our current system. The consultant should be able to view an overview of their active clients and scheduled tasks related.

How do you envision being able to track forms and waivers. Will the forms be a part of the CRM? Or would someone manually update the information into the system? The goal is for a consultant to have awareness of what standard forms/waivers have been completed by the client. It would be beneficial to have forms be a part of the CRM system, digital signatures and time stamps would be a requirement. Or some other digital verifiable and legal way to obtain authorization. Alternatively, this could be accomplished with an extension to our file sharing system Google Drive.

Is the payment and registration process meant to be integrated with the Learning Management System only or is there another system involved? If not, where are they stored and can we get access to the documentation for those? The current registration and payment process is too complicated. It involves the client 1) Registering and submitting payment using the legacy CRM system, and 2) Being redirected to the GoToWebinar platform to complete a second registration process for the actual webinar event. We would like to streamline this process so the client only completes a single registration, but with that data being integrated between the webinar platform and CRM system.

The external LMS is intended for on-demand static training content and *will not involve an "event registration" process*. The specific scope and requirements of the LMS will be determined prior to selection of a Salesforce implementation vendor, and will be implemented by another vendor.

Does SBDC currently have a payment gateway? The payment gateway is Authorize.net

What are the possible types of workflows? What is the flow of any process related to client interaction? The specific requirements in this area would need to be explored by the implementation vendor. Workflow needs are minor. It may include a document approval process.

What type of forms/waivers is SBDC sending to clients? Are you looking to have these documents created/stored in the proposed solution or simply track if they've completed a form/waiver? The primary form that is completed by clients is the "Electronic Request for Consulting". This form is integrated with the legacy CRM system. You can see the contents of the form from the perspective of the client at this link: https://sbdcmichigan.org/request-for-business-counseling/

Other forms include "SBA Media Release Form", "Consent to Release Information" and an "Impact Collection Form". We do not have a preference on how these forms are created/stored as long as they are attached to the customer profile in the CRM.

What current, if any, Salesforce licenses are in place? None

What are the different permission requirements?
Super Admin: 3
Super User (Lower Level Admin): 20 - 30
Team Manager: 15 (May have some overlap with Super Users)
General Users: 100 - 150

<u>Marketing & Lead Generation Questions</u>

What marketing tool are you using or want integrated? We are currently completing a review of our digital marketing platforms, and identifying the tool-set that may best align with Salesforce. A recommended tool-set will be available for feedback by the Salesforce implementation vendor before that tool-set is finalized. Platforms currently in use are Constant Contact, Canva, Meltwater (social listening and PR distribution) and social media platforms (Facebook, YouTube, Twitter, Instagram, LinkedIn).

How do you acquire new leads? Our core channels for acquiring leads are:
Organic SEO/search
Referrals from partner organizations
Training Events (in-person and online)
eNewsletter sign ups
Earned PR
Paid Ads (expanding paid ad strategy in 2021)
Gated content (coming in 2021)

How do you nurture leads? How do you wish to include the CRM in the lead management process? A lead will have likely taken one of the following actions:

- Accessed content on the SBDC's website
    - i. Organic Content
        1. Served with retargeting ads to drive viewer back to the SBDC website to complete an action:
            - a. Sign up for email comms
            - b. Register for training
            - c. Request consulting
    - ii. Accessed gated content (will implement in 2021 in alignment with UX rebuild)
        1. Accessed three free training courses and submitted their email for more
        2. Downloaded the Guide to Starting a Small Business
        3. Get added to email comms list.
- Joined the Michigan SBDC's email list
    - i. Receive welcome series based on list segmentation
        1. 'I want to start a business'
        2. 'I want to grow my business'
        3. Business Education Updates
    - ii. Could be added to a "lead list" in the CRM, for individual outreach from an SBDC team member
    - iii. Get introduced to the SBDC brand, access digital content, or drive to the next two actions:
- Register for Business Education
    - i. Complete courses in the SBDC's LMS
- Request one-on-one consulting
    - i. Enter CRM as an active client
    - ii. Outreach from SBDC intake consultant
    - iii. Identify additional demographic information for marketing segmentation
    - iv. Service delivery begins
- Notes:
    - i. CRM to integrate with MA toolset to indicate when a business has changed status (example: not in business to in business)
    - ii. Considering a chatbot for to answer basic questions & integrate with CRM for lead generation

At what point do you identify a business opportunity with them? Typically, A business opportunity is initiated when the client completes an "electronic request for consulting (ERFC)" on our website, or when they participate in a training webinar/workshop.

How do you pursue business opportunities with them? The first step in the client intake process is a screening call and "initial session" that identifies how SBDC services may best fit the client's needs.

Do you wish to submit the data directly from salesforce as an integration? Or do you wish to download the data and manually share it with EDMIS? We are seeking the recommendation of the implementation vendor for what would be the most effective approach based on time and cost.

III. Updated Project Timeline

Click link for document that specifies the Salesforce implementer scope