SALESFORCE GOVERNORSHIP RFP 2022 QUESTIONS & ANSWERS

General / Other

Q. **What is the size of the support tickets volume on a monthly basis? Can Visit California provide ticket activities by priority level?**

A. We get roughly 5 support tickets per week, ranging from high priority to low, and multiple enhancement requests coming in per week.

Q. **How many Salesforce-related tickets are handled each month?**

A. Same answer as above.

Q. **Can you provide trend/Breakup of ticket volume per month for the last 6 months with categorization?**

- **P1, P2, P3 – Service Request, P4 – Enhancement – Change Request**
- **Bug fixes vs Service Request**
- **FinancialForce vs Salesforce**

A. Same answer as above.

Q. **What are the top 3 metrics being tracked to measure customer satisfaction? How does Visit California measure user adoption today?**

A. Right now, the number of user logins per day. We don't have other metrics currently being tracker to measure customer satisfaction as it pertains to SFDC usage. We are open to other methods.

Q. **How is user adoption of Salesforce currently measured?**

A. Same answer as above.

Q. **Can you identify any key dates that may impact the project schedule (e.g. go-live for another project, sales meetings, end of fiscal periods, black-out periods, or planned shutdowns)?**

A. VCA operates on a 6/30 Fiscal Year End. Key dates by relevant stakeholders/SME's include, but not limited to:

- Financial Reviews/Audit: first 2 weeks of January, first 2 weeks of April, Last 2 weeks of August.
- Board meetings: mid-October, mid-February, and mid-May

- Week between Christmas to New Years: Entire company is away from office with limited email interaction.
- List of VCA holidays can be provided upon award of RFP.

Q. At the commencement of the awarded contract, what in-house Salesforce/FinancialForce skills/expertise do you plan to have and how will these resources work with the winning vendor(s)?

A. After the commencement, there will be discovery sessions held with both stake holders and SMEs to help evaluate both needs and expertise. Our current business model relies on lean staffing and contracting out a significant portion of technical skillsets needed. We maintain a certified project manager, technical IT staff, Solutions Architect, and SME's.

Q. Do you have internal Salesforce expertise or administrator that will be assigned to this project?

A. Same answer as above.

Q. What is the structure of your Salesforce product and project teams? For example, how many internal Salesforce business analysts, developers and QA team members do you have? Do you have a product or process owner(s) defined? If so, how many are there?

A. Same answer as above.

Q. The RFP speaks to additional integrations with the system. Would you be able to list the tools/systems and what business process each supports?

A. We currently have a number of tools/systems that are manual data transfers through csv uploads, which we wish to automate/integrate. This includes data to/from FFA and Chrome River (P2P), FFA and PNC (Bank) for lockbox receipts and vendor payments, potentially an integration between FFA and Concur for our expense management reports to our ERP, and more. Additionally, we are always looking at new tools/systems to improve/enhance operational efficiencies and would want these tools to be integrated with Salesforce, as appropriate.

Q. What type of Salesforce development environment does Visit California have? Please describe how each of the sandboxes are being use?

A. We use Bit Bucket for branching and releases, as well as Jira and Confluence for enhancements and support. We also host both full and partial sandbox environments to support these processes with Production, UAT, and QA environments.

Q. What supplier has Visit California contracted with to support Salesforce activities, configuration, training, support, etc.?

A. We have had several vendors that have helped us deploy the platforms and maintain it with enhancements and support. We will not be releasing those names at this time.

Q. If a local Sacramento resource was provided, does Visit California have the office space to give that resource a work area? Is this considered an advantage?

A. Yes.

Q. Does Visit California currently have a defined software delivery lifecycle process for software development? If so, what is your software release cadence?

A. We normally run 2-week sprints, with releases, and then do a retrospective meeting after the release.

Q. Do you require skills/resources for the other applications, i.e. other than Salesforce (FinancialForce, Nintex, DocuSign, NICE, Dell Boomi, etc.)?

A. Yes. Visit California relies on vendors to assist us with the skills/expertise on most of our systems.

Q. Do you plan to require usage of any Salesforce development tools for DevOps, Test Automation, etc.? If yes, would additional budget to be earmarked for the licensing of these tools?

A. Yes, we would like test automation tools, and code reviews for all releases. Additional budget would need to be earmarked for those tools/licenses.

Q. Any automated tool used for code quality check?

A. We currently use peer-code reviews by the Governance team.

Q. What are the DevOps tools used for deployment?

A. Jira and Confluence. We use bit bucket for deployments.

Q. Branching and instance strategy for (1) defect fixes and (2) enhancements (how many instances are used for Deployment – SIT, UAT, PROD)?

A. We use Jira for Kanban, and Bit Bucket for branching and development.

Q. Can you share the tools you are using for support, enhancements, documentation, testing, and project management?

A. Right now, we are using Jira and Confluence for development, and Bit Bucket for Branching.

Q. **For data compliance do we need VPN, secure Bay, etc.?**

    A. Yes. You will need Global Protect for Dell Boomi work. You will also need access to our Okta system for Salesforce and FinancialForce (SSO).

Section 4 – Available Funds

Q. **You list "New Enhancements / Projects" under the allocated budget. Does this mean the $800k - $1.2M budget primarily includes Salesforce/FinancialForce governorship and Managed Services estimations plus "some" amount of enhancements that we are able to estimate within that budget amount? Please clarify.**

> **A.** The $800K - $1.2M is our annual estimated budget available for all Salesforce-related costs. This includes governorship and managed services, as well as the potential new enhancements/projects. We understand the difficulty of scoping specific projects identified within the New Enhancements list, which would require detailed discovery with your team. As a result, we are requesting for this RFP you provide bids on the Governorship and Managed services, with the understanding that this is part of the total budget available each year. We plan to focus the award of this RFP on those services, but we encourage you to showcase your skills on the other projects. We welcome you to also quote/bid on the new enhancements/projects at a high-level, understanding those numbers are currently estimates that require refining before becoming enforceable. The budget for the new enhancements/projects would also be part of the overall $800K - $1.2M, and projects may be pushed to future fiscal years when we have additional budget to develop.

Q. **Please confirm the budget for this RFP only includes Salesforce & FinancialForce Governorship and managed services. All new enhancements and projects as defined in Section 10.7 will be considered under additional scopes of work?**

> **A.** Same answer as above.

Section 7 – Current Infrastructure

Q. **Can you provide current architecture diagrams showing data and control flow interactions between technology components?**

A. Documents can be provided after a signed NDA.

Q. **Can you provide an architecture diagram for the integrations with other systems, as depicted in Section 7?**

A. Documents can be provided after a signed NDA.

Q. **Integration at API level – can you list external applications integrated as per following categorization?**

- **Realtime / near real-time and Scheduled (ETL Jobs/Name of the ETL tool)**
- **Direct end point integration and via middleware (name of middleware)**
- **Call-in and Call-out transaction volume per day**

A. We utilize Dell Boomi for our API's that run on a synchronous schedule. Additional details to numbers and specific integrations can be included in our infrastructure documentation, which is available upon a signed NDA.

Q. **Integration at DB level (Salesforce Connect / External object etc.) or UI level (Mashup)?**

A. We use Dell Boomi for integrations, along with Bit Bucket for development branching.

Q. **What CI/CD tools, if any, do you currently own?**

A. We use Dell Boomi for integrations, along with Bit Bucket for development branching.

Q. **What is the level of detail captured in error logs today for cross-system integration errors?**

A. All exceptions are logged, and emails sent to stake holders, as well as logging on backups and any API's.

Q. **How many of the integrations listed are live/batch jobs?**

A. We have live jobs to create invoices, and a batch that runs overnight to create assessment notices. Additional details to numbers and specific integrations can be included in our infrastructure documentation, which is available upon a signed NDA.

Q. For the current integrations and/or system interactions detailed in Section 7, which systems would you consider your most and least important for your Salesforce program?

A. 1) Banking/Merchant Integration

2) GCP Integration

3) NICE InContact Call Center Integration

4) Own Backup Integration

6) Vena Integration

7) DocuSign CLM Integration

8) Chrome River Integration (Future project)

Q. Please describe the type of data that will be migrated to Salesforce.com. What is the volume of data that needs to be migrated?

A. We currently do not have any major data sets we are requesting your team to migrate over to Salesforce. We do have smaller recurring data sets that are manually uploaded to SFDC and FFA, which we would like assistance in building integrations to automate the movement of data into SFDC. We currently export out data to several sources via Dell Boomi, and other vendor APIs.

Q. Is there any existing application that can/should be leveraged for data migration using ETL, de-duplication tool?

A. The only tools we currently have access to is the built in Salesforce duplication rules and what is available within Dell Boomi. Discovery/suggestions are needed on this item.

Q. Please describe how customer conversations are currently taking place in social media networks today?

A. This will take place when we have our data warehouse completed, and integrated with salesforce, but we would want YouTube, TikTok, Facebook, Instagram, Podcasts, and others.

Q. **The RFP references data from disparate systems. Please elaborate on which disparate systems are most critical to gather data from as part of this RFP?**

A. We are building a data warehouse as part of a separate RFP that will centralize disparate data sources. These data include contacts data and their related account data, as well as activities data related those events and campaigns. It is that central database that will eventually need to be integrated/synced with proper Salesforce objects.

Additionally, we have manual data integrations into SFDC/FFA that we would like to automate. Examples include
- Integration of our P2P (Chrome River) with FFA
- Finding a new, or integrating our current, event management platform to sync (1) event registration data on our accounts with activities, (2) generate sales invoices and cash entries in FFA, centralize data reporting and metrics on events from one data source, etc.

Q. **Do we have any Legacy data which would need to be handled after the customizations?**

A. We have no legacy systems that need to be maintained. There a few legacy data sets in Salesforce but noncritical to current operations.

Q. **Please describe Visit California's custom code usage in terms of functionality and complexity.**

A. Roughly 60-70% of our environment is custom apex code, and objects. We have significant non-standard SFDC development that will require extensive discovery prior to start of work.

Q. **What is Visit California's planned platform for Data Analytics? Does Visit California want to continue to use Looker for BI or contemplating any other tools?**

A. Right now, we use Looker for data analytics, but will be building a much bigger data warehouse that will use multiple tools like Looker and Tableau.

Q. **What data warehouse capabilities does Google Cloud Platform provide today?**

A. Google Cloud is currently only used for secondary storage and data queries. Integrations are limited to filing data/documents and linking content back to Salesforce.

Q. **Can you tell us what vendor(s) implemented the current system?**

A. We will not be releasing names at this point.

Q. **Did you have one or more current Salesforce partners that implemented these solutions?**

A. Yes.

Q. **Do you have FinancialForce and Salesforce community integrated?**

A. Yes.

Q. **Can you describe your community implementation and level of customization involved including UX and Billing? Some key issues Managed Services providers should be aware of to ensure effective staffing is made? How many customers are currently using community and expected growth in the next 3 years?**

A. The Communities billing platform is 80% customized. There are approximately 12,000 users with an anticipated 20% growth over the next 3 years.

Q. **Can you list if any customization is built on current Force.com platform?**

A. Our system is highly customized in terms of processes, objects, labels, and flows. Documentation can be provided with an NDA, and discovery sessions will need to be held to fully understand our environment.

Q. **Customization – can you provide an active count of following components?**

- **Workflow rules**
- **Process Builder**
- **Flows**
- **Apex Classes**
- **Triggers**
- **VF pages**
- **Aura Components**
- **LWC**

A. 1) Workflow rules   23
    2) Process Builder   13
    3) Flows   6
    4) Apex Classes   9,500
    5) Triggers   372
    6) VF pages   1,240
    7) Aura Components   62
    8) LWC   62

Q. **Is there any other non-Salesforce specific framework used? (e.g. Angular JS, etc.)**

A. None to note at the moment. We use visual force pages for our .gov website.

Q.   Any of the custom code/component with known performance issue?

> **A.** We have not seen performance issues on our overall system, but we do have performance issues with our notice process and automation.

Section 8 – Key Business Processes

Q. Do you have any business process or flows or requirements documentation for the key business processes defined in Section 8?

    A. Documents can be provided after a signed NDA.

Q. Can you provide current capability maps, if any, of existing SFDC implementation?

    A. Same answer as above.

Q. Can you provide business process diagrams for current SFDC-related business processes capturing business functions and interactions between technology components?

    A. Same answer as above.

Q. How many total Salesforce end user personas do you have? Are they currently documented and available prior to the submission of the RFP?

    A. We currently do not have truly defined "personas" for our salesforce users. This is a project we would like to perform to better define personas, re-evaluate user permission sets, profiles, and roles.

    That being said, we have a total of

        Internally: 92 Salesforce Users, 25 FinancialForce users
        Externally: 12,000 external users via SF Communities

    These license users include the following general user groups:
        - 8-10 Finance/Accounting Users
        - 4 Assessment Program (Customer Billing Platform) Users
        - 10 Sales Reps/Liaisons
        - 7 Office Admins/Executive Assistant Users
        - 8 Data Users
        - 12K - 18K Customer Community Login Users
        - 50-55 Standard Users

    We don't anticipate major growth in our internal user base over the next 3 years (maybe 2-3 new internal users/year).

Q. How many users are using Salesforce and FinancialForce – both internal and external? What is the expected growth in the user base in next 3 years?

    A. Same answer as above.

Q. **Please describe the current user base of Visit California's Salesforce organization, including all roles and profiles.**

A. Same answer as above.

Q. **What are the total number of end users today?**

A. Same answer as above.

Q. **What is the current volume of tickets and can we get a daily, weekly, monthly dump? What is the ticket count split by complexity – high/medium/low? How many tickets are worked on daily by a resource (average)?**

A. We get roughly 5 support tickets per week, ranging from high priority to low, and multiple enhancement requests coming in per week.

Q. **Can you share your expectations on SLAs (Service Level Agreements) expected for L1, L2, L3 tickets?**

A. For P1, we would require 24 hour SLA, P2 and P3 can be discussed, but usually these issues will be identified and put on the Kanban board.

Q. **How are the tickets distributed today? Based on skill, availability? Is omni-channel in use?**

A. Tickets get prioritized and put on a Kanban board and prioritized for whoever has time. During the daily stand-up, tickets can be re-prioritized based on needs. We are open to discussion on process improvement.

Q. **Do tickets get created/resolved in multiple languages?**

A. English is our primary language; no other languages are used.

Q. **What are the different types or classification of tickets?**

A. P1 (critical), P2, P3 and P4 (lowest).

Q. **What is the average completion time and effort per ticket and ideally, per type of ticket?**

A. P1 is next day, and the rest can be prioritized based upon urgency of tickets.

Q. **Open issues / Service Requests with Salesforce or FinancialForce support teams?**

A. We have a backlog of issues for both Salesforce and FinancialForce.

Q. **What is the number of recurring issues that need scheduled/frequent fixes?**

A. We get roughly 5 support tickets per week, ranging from high priority to low, and multiple enhancement requests coming in per week.

Q. **How much time (in hours) are currently devoted to support Salesforce today? Do you expect in the future, i.e., from this RFP?**

A. Roughly 15-20 hours per month on average. We expect that to maintain, and possibly increase, depending on additional system development (e.g., marketing cloud implementation, service cloud implementation, etc.)

Q. **What does the current support team look like, i.e., what roles, etc.?**

A. We have roughly 10 Stake holders, 2 product owners, 5+ SME's and two in house admins that create accounts.

Q. **Are you expecting an Agile approach? And if so, do you have a backlog of feature functionality or enhancements? How many sprints would you expect per month?**

A. Yes, Agile has been our development approach to date, but are open to others. We do have a current backlog list that is actively being worked on. We currently work on 2-week sprints.

Q. **Is SSO enabled today? How is the security/data integrity maintained across the platforms?**

A. Yes. We maintain security through Okta. Security/data integrity can be discussed further after a signed NDA.

Q. **What is the number of reports/dashboards being maintained in Salesforce today?**

A. Roughly 150 reports used daily.

Q. **Will data migration be involved as part of the managed services RFP? If so, which systems would be the source system(s)? How many years of data would be migrated? What data migration tool do you utilize, if any?**

A. There should be no data migration right now, as we have both a Salesforce database, and also a GCP (Google Cloud Platform) environment where data is pushed to and should stay that way. We have smaller data sets that we wish to have pushed/pulled between systems through integrations and API's.

Q. **What does the existing team structure look like, will we have daily/weekly availability to Visit California key stakeholders/super users?**

A. We have roughly 10 Stake holders, 2 product owners, 5+ SME's and two in house admins that create accounts. Both daily and weekly access will be available, based on advance notice and scheduled calls/meetings.

Q. **What is the level of documentation available? Who will be the point of contact for knowledge transition from the existing team?**

A. We do have a documentation repository and also recorded discovery sessions. Our internal Solutions Architect and IT Project Manager will be the primary point of contact for the knowledge transition.

Q. **Who will be the point of contact from Visit California team for the engagement and what activities will be performed by them to support the vendor?**

A. The points of contact will be our Solutions Architect and IT Project Manager, and discovery sessions will be held with stake holders and SME's.

Q. **What are the different types of users for each key business process?**

For example,

- **Tourism Assessment Program has California businesses users on Salesforce Communities, as described. How many such businesses are currently customers, and how many such (external) users? Are there any internal Visit California users that access SFDC via a login, and how many?**
- **How many users access the ERP system, and how? How do users use SFDC and FinancialForce together? Via separate logins, or Single Sign On?**
- **Same questions on internal and external users for Tourism Stakeholder and Marketing management processes – outside sales meetings, Executive presentations, Mail and email campaigns.**

A. Tourism Assessment Program - External users utilize the Communities platform via login.

There are 11,340 community user licenses. Visit California has no internal users that access Salesforce Communities.

All internal Visit California users (92 active users) must sign in to SFDC and FinancialForce (25 active users) via SSO (Okta).

In regard to Tourism Stakeholder and Marketing Management, the same users identified as SDFC users have access to these processes. We are seeking assistance in developing use cases for these groups.

Q. **For Customer Portal, how many users does Visit California currently have? What self-service capabilities does Visit California provide to the customers?**

A. We have roughly 11,340 Community licenses which equates to 18k + logins for our clients, and roughly 92 internal active users. We have a team of people that help with password resets, lockouts, and assessment filings.

Q. **The skill sets to manage and maintain Salesforce/FinancialForce and to build or improve existing and future integrations are very different. In terms of thinking about staffing model and price, should we assume that true Dell Boomi or other system integration build work will be covered as an add-on to this project? If not, can you provide some guidance on expected work allocation between integration work and Salesforce platform work?**

A. Under the current RFP maintenance of Dell Boomi integration is expected. As new projects are developed, new integrations or updates to existing integrations may be required. We would anticipate the selected vendor to perform maintenance and management of integration relationships. The initial workload is Salesforce platform focused, with future work more focused on integrations.

Q. **What is the expectation under this contract in terms of end user training and change management?**

A. We would like you to provide training or videos to our end users and change management will be controlled by our Project Manager. We have user adoption training Software to also assist end-users with training and change management (Toonimo).

Q. **Do you have a current process for evaluating, approving, and prioritizing enhancements/new functions?**

A. Yes, current items are all put into backlog, and then discussed during standups. They are also prioritized and assigned during sprint planning.

Q. **As it relates to duplicate data, do you own any sort of AppExchange de-duplication add-ons? Do you have a strategy and rules for record duplicate identification and resolution?**

A. We currently use Salesforce's de-duplication processes for records. we would like to enhance this process to merge duplicates.

Q. **Are the pain points and future states listed in this section areas for optimization/improvements for this RFP, or are they an indication of potential improvements that would be addressed as part of "10.7 Potential New Enhancements/Projects"?**

A. Yes, we are looking for a partner to address challenges with our Architect and Stake holders within this RFP. Standard enhancement requests that help solve pain points and future state would be added to the backlog and serviced under managed services section of this RFP. If a solution would be significant in scope, then we would discover and scope it separately to bring in additional resources to complete. We will work with our partner(s) to develop a realistic roadmap over the next 3 years.

Q. **Thanks for sharing the overview under "Key Business Processes" section. Are you expecting us to address the challenges as part of the proposal or is it information only for future development/ enhancements projects? Do you have any roadmap for implementing some of these projects you can share?**

    A. Same as above.

Q. **Is Visit California currently using Salesforce Community Cloud for the Customers? How are the current requests handled and managed?**

    A. Yes, we use Community for our clients to login and file assessment notices.

Q. **You state lack of automation with repetitive processes is a current challenge. What manual processes are being repeated (onboarding, running of notices, routing)? For acquisitions, what are the steps in the process?**

    A. All of the above are challenges for us. We can provide steps and documentation after an NDA is signed.

Q. **You state prevention of duplicate record creation is a current challenge. Are there any current automated or manual de-duplicating processes?**

    A. We currently only use the out-of-the-box Salesforce product to identify duplicates on the account object. All other duplicates are identified and removed manually via bulk updates.

Q. **You state limited automated activity creation for emails, calls and chats is a current challenge.**

    - Does this mean not all calls/chats are being recorded?

    - What is blocking adding the activity records for these?

    - Has the implementation of Marketing Cloud been considered for the next fiscal year to replace Mailchimp and potentially other programs?

    A. Automated creation of activities is not reliable with current softphone/outlook integrations. Activities can be created but are manual and time consuming. Marking Cloud is under consideration.

Q. **You state Customer Request creation and management is a current challenge. What are the high-level steps for this Customer Request management?**

    A. The current process is somewhat cumbersome and manual to process. We would like to Simply and automate these processes to update/complete the customer requests.

Q.   **You state Notice process management is a current challenge. Is Visit California open to replacing Nintex and going through vendor selection for this?**

   A. Yes.

Q.   **You state improved customer experience through additional access to account details and business statistics is a potential future state. What current statistics and metrics is Visit California using? What account details are missing?**

   A. Visit California currently provides a calculated Percentage of Tourism to businesses. The ability to provide additional details around visitation (number, origin, behavior, etc.) is future state.

Q.   **You state systems integrations and process automation between systems; current state of FinancialForce workflows; and user permissions and profiles as current challenges.**

   A. Yes, our processes are partially automated but required to be touched by end users very heavily. We are looking at fully automating a process from start to finish.

Q.   **What kind of support does Visit California expect from the different vendors (FinancialForce, looker, Vena, Chrome River, Concur, etc.)?**

   A. We will have support agreements in place for outside vendors that need to interact with our Salesforce platform and FinancialForce. This RFP is to cover the governorship and managed services of our Salesforce environment and related integrations.

Q.   **What type of interaction and level of edits are expected for FinancialForce pages (several pages are part of managed package and controlled by FinancialForce)?**

   A. We expect that the RFP winner will directly interact with FinancialForce including custom code and processes. Any managed packages will be revaluated if the process needs to be automated.

Q.   **Will any other support contracts be executed directly with any of the vendors and, if so, which ones?**

   A. Yes, we will have support contracts with most, if not all of our outside vendors like GCP, Chrome River, etc. They will help with solutions, but the RFP winner will be in charge of making changes related to Salesforce, as well as governing/playing technical liaison with respective support teams.

Q.   **Are license agreements in place for all the listed vendor technologies to continue through Visit California's next fiscal year June 2023?**

   A. Not all of our licensing agreements end at our Fiscal year end. Some contracts do expire through the fiscal year, but we maintain those contracts to renew on a regulated and compliant basis.

Q.   **If not, is there a consideration of replacing those technologies as during the course of this RFP support agreement?**

   A. We will look into all considerations of replacements but will most likely be planned for when the contract expires. Solution development would need to align with those contract renewals to minimize wasted license spend.

Q.   **You list automated integrations between all financial systems is a potential future state. Which financial systems are expecting immediate integration (Ex. Chrome River and Vena)? And, for these, can you please provide a brief architectural review of how that system is currently being used by Visit California?**

   A. Primary integrations include:
   - Chrome River to FFA
   - FFA to/from PNC (Bank)
   - Concur to FFA

   Architectural review can be provided upon a signed NDA.

Q.   **How are the Liaisons currently managing the Contacts list that are attending an event or talk? Do they have a list of the Contacts who will be attending the event?**

   A. Contacts are collected via Excel, compared to Salesforce data, then uploaded to Salesforce. Yes, although each event is managed by a different team.

Q.   **Is Salesforce Maps currently configured in Visit California's Salesforce org and are the Routes creation for the Liaison currently handled through it and how?**

   A. We do not currently have access to Salesforce Maps or any other mapping technology.

Q.   **For the Outside Sales Meeting process, the potential future state defines advanced location mapping capabilities to identify stakeholders en-route to a location. Do you own Salesforce Maps or another mapping technology you'd like to integrate?**

   A. We do not currently have access to Salesforce Maps or any other mapping technology.

Q.   **Will a specific region be assigned to a Liaison and based on that they will be managing all the Stakeholders that fall under the assigned region?**

   A. We have an object in Salesforce that maps each California zip code to a Liaison user.

Q.   **You state manually gathering electronic and non-electronic data for executive presentations is a current challenge. What kind of data is**

manually being gathered? (ex. stack of business cards from a conference; manually entering conversations, etc.)

A. We are building a data warehouse as part of a separate RFP that will centralize disparate data sources. These data include contacts data and their related account data, as well as activities data related those events and campaigns. It is that central database that will eventually need to be integrated/synced with proper Salesforce objects.

Q. **Referring to Executive presentations to tourism related groups and organizations, does Staff share a Form or something similar to it in order to manually capture the activities and results data?**

A. Staff use a formatted excel doc to gather data that is easily converted to a bulk-uploadable file.

Q. **You state limited data available for executive presentations is a current challenge and list key data attached to account and contact records as a potential future state. What data is not currently being captured in Salesforce that would need to be? What is the source of this data?**

A. We are building a data warehouse as part of a separate RFP that will centralize disparate data sources. These data include contacts data and their related account data, as well as activities data related those events and campaigns. It is that central database that will eventually need to be integrated/synced with proper Salesforce objects.

Q. **What are the current "disparate sources" from which the activities and results data are being manually and electronically gathered?**

A. Same answer as above.

Q. **Type of Related data contained within disparate systems?**

A. Same answer as above.

Q. **You state the Salesforce App does not work consistently and/or smoothly for end users. What specific functionality is not working in the mobile app?**

A. Challenges with SSO, Check-In and usable visual force page layouts for customer-built elements.

Q. **For the Outside Sales Meeting process, the potential future state defines a fully developed Salesforce phone/tablet app. Do you have a preferred architectural approach to mobile? i.e., Salesforce native capabilities or a React application?**

A. We do not have identified approach and would be looking to the selected vendor to provide guidance and suggestions based on the needs of our Outside Sales Meetings.

Q. **You state poorly built integrations and processes with email, calendar, and tasks for liaison team is a current challenge. What is currently being used for a calendar application? Outlook?**

A. Outlook is currently used for communication and calendaring.

Q. **You state email contact activity not integrated or easily captured within current CRM. Are these emails being sent out of Outlook, Mailchimp, both?**

A. Emails are sent via Outlook, Mailchimp, and Nice InContact.

Q. **You state inability to efficiently manage and keep up-to-date voting rosters within Salesforce is a current challenge. What voting roster processes are expected to be automated?**

A. We would like a process built to visualize rosters, make efficient changes, and track changes across rosters.

Q. **You list integration with stakeholders' social media; Account's social media pages auto populated; and automated process to update published content mentions/links as a potential future state. Which social media accounts? Is the integration one-way (only social data sent to Salesforce) or two-way (Salesforce triggers any posts or actions on social accounts)?**

A. This will take place when we have our data warehouse completed, and integrated with salesforce, but we would want YouTube, TikTok, Facebook, Instagram, Podcasts, and others.

Q. **You list processes to identify and update contact who've change accounts/companies as a potential future state. Is identifying contact updates expected to be automated? Will these be identified ad updated manually through outside sales meetings?**

A. Both. Some contact management activities can be automated; however, many will continue to come through outside sales meetings.

Q. **What data does Visit California expect from Salesforce that will help executive level presentations?**

A. All Visit California activities related to relevant contacts and events. This data is starting to be manually uploaded to the activities object, though future data warehousing will centralize this data before being integrated to Salesforce. We want to be able to leverage this data to build insights and reports for our executive team to use in presentations, board meetings, and to external parties in an efficient and automated fashion. This will likely include/require integration with a BI tool (currently use Looker, but open to other recommendations). The ability to update PowerPoint slides, infographics, and B2B-facing website with current and/or versioned data sets directly from Salesforce data.

Q. **Could Visit California clarify the potential future state (for outside sales meetings and executive presentations mentioned on pages 12-13) and a prioritization guideline with respect to the future state?**

A. The future state would ensure Salesforce (along with other integrated storage) can provide a detailed picture of our organization's relationship with that particular account or region. This would include but is not limited to a record of relevant marketing campaigns, content mentions, communication, event participation, and sentiment. This would include setting up dynamic/robust reports and dashboards to reflect relevant data

Q. **What is your appetite for onshore vs offshore percentage split?**

A. This really does not matter as long as we can get a hold of people during normal Visit California business hours (8am – 6pm PST).

Q. **Because we are an LLP, we typically do not provide financial statements as part of our RFP bid process. Will this be problematic for our qualifications as it relates to this RFP?**

A. We will not disqualify you from the process if you do not provide your financials, but it may have an impact in your overall proposal score.

Q. **Do you have SLAs or do we define? Any SLA financial penalties?**

A. We can discuss SLAs with the RFP vendor, and once agreed, there could be potential penalties for the RFP winner if SLAs are not met regularly.

Q. **Is there a budget and prioritization ranking for each one of the projects from Section 10.7? The projects referenced in the RFP are as follows:**

- Development of Salesforce Reports and Dashboards

- MS Outlook and Apple Mail integrations with Salesforce

- Re-build Tourism Assessment Notice process

- Automation of all manual processes

- Service Cloud Implementation (call center and helpdesk ticketing)

- Marketing Cloud Implementation

- Event Management Platform Implementation/Integration

- Contract Lifecycle Management (DocuSign CLM) Enhancements

A. 1) Re-build Tourism Assessment Notice Process
2) Automation of all manual processes
3) Contract Lifecycle Management (DocuSign CLM) Enhancements
4) Service Cloud Implementation (Call center + Helpdesk)
5) Event Management Platform Implementation/Integration
6) MS Outlook and Apple Mail Integration with Salesforce
7) Development of Salesforce Reports and Dashboards
8) Marketing Cloud Implementation

Q. **What support coverage (core business hours, 5 days a week, 8-5 PST etc.) is Visit California considering?**

A. Business hours are Monday through Friday 8am to 6pm PST. Depending on the critical level of a break fix need, request for resolution may be requested during non-standard business hours.

Q. **Is there a list of desired custom reports you wish to have created as part of their scope of this project?**

A. A current list of some custom report needs currently relate to financial audit needs. This includes, but is not exclusive to, the following custom reports:
- Custom Assessment revenue reports, connecting related objects data that is not connected in SF Reports yet,
- Custom Assessment A/R Aging reports as out-of-the-box reports currently don't reflect everything we need,

- Custom Bank reconciliation reports, connecting related objects data that is not connected in SF Reports yet

Custom reports are also commonly built for and included with Salesforce upgrades and processes fixes. We also have constant ad hoc reporting needs as well.

Q. **Can you provide an example of the types of "maintenance" you anticipate for the custom-built billing platform?**

A. There are monthly updates to the custom-built billing platform that needs to be addressed, some involve lightning pages, proactive planning for Salesforce releases, API's, changes in billing periods and fiscal years, etc.

Q. **Outside of the existing systems/integrations, is there an anticipated list of new systems to integrate that we should consider or major changes to the existing connections?**

A. We could possibly transition from Dell Boomi to Mule Soft, and we are looking at integrating Air Table, potential new Travel and Expense Management system, and Event Management system. We will also be looking at adding Service Cloud and Marketing Cloud.

Q. **Can you provide additional detail on your expectations/definition for Data administration as it relates to this RFP?**

A. Data administration will primarily be between Salesforce and GCP, Looker, and our data warehouse project.

Q. **This section lists monitoring. Is the expectation to have availability monitoring 24/7 with incident response? Or do you have an expected limit to hours or an expected budget for this (monthly basis)? In addition, would monitoring be conducted via client provided monitoring tools or would the bidder be expected to supply their own monitoring platform?**

A. We would like monitoring for our visual force pages to be 24/7 but for normal system tickets, it will be Monday through Friday unless a P1 ticket needs weekend work.

Q. **Can you provide an example of "other services" outlined in Managed Services biddable?**

A. Other services would include other minor asks that would fit within managed services and governed services, which we have not explicitly stated within the RFP. Anything that might be a significant request, not within standard scope, would be discussed and evaluated to determine a scope of work.

Q. **Do you currently have a managed services contract? If yes, what does it include?**

A. Yes. The managed services currently include what would be defined within any standard managed service contract, and anything defined within this RFP.

Q. **Can you list the Salesforce and FinancialForce Modules included in the Managed Services Scope. List down key integration points, customizations in scope, including any external integrations such as payment gateways, banks, etc.**

A. We utilize the following modules/functions:
- **SFDC**
- **SalesForce Mobile App**
- **Salesforce CRM Dashboards**
- **FFA Billing Central**
- **Conga Composer**
- **Nintex DocGen** (customization in scope)
- **FFA Accounting**
- **FFA FAM**
- **NiceInContact** (key integration, customization in scope)
- **SalesForce Communities** (customization in scope)
- **DocuSign CLM** (key integration, customization in scope)
- **PNC Bank** (key integration)
- **PNC Merchant Services** (key integration)
- **Vena** (key integration)
- **Dell Boomi** (key integration)
- **GCP** (key integration via Dell Boomi)
- **Own Backup** (key integration)

Future state items that we would consider to be within this scope:

- **Chrome River** (key integration, customization in scope)
- **Concur or Other T&E Platform** (key integration)
- **Looker/Tableau** (key integration, customization in scope)

Q. **What will be the exact scope for the proposal? Is it Managed Services only or do you want us to share approach to manage the Development or Enhancement Projects? Are the enhancement projects already finalized? Do you have any timelines or scope identified?**

A. The exact scope is specific to Managed Services and Governorship, as outlined in 10.6. For us, Governorship includes providing an approach to manage the development or enhancement projects. These projects are not finalized, and require additional discovery, both internally and externally, to define the scope and timelines.

The $800K - $1.2M is our annual estimated budget available for all Salesforce-related costs. This includes governorship and managed services, as well as the potential new enhancements/projects. We understand the difficulty of scoping specific projects identified within the New Enhancements list, which would require detailed discovery with your team. As a result, we are requesting for this RFP you provide bids on the Governorship and Managed services, with the understanding that this is part of the total budget available each year. We plan to focus the award of this RFP on those services, but we encourage you to showcase your skills on the other projects. We welcome you to also quote/bid on the new enhancements/projects at a high-level, understanding those numbers are currently estimates that require refining before becoming enforceable. The budget for the new enhancements/projects would also be part of the overall $800K - $1.2M, and projects may be pushed to future fiscal years when we have additional budget to develop.

Q. **Is Boomi support also in the scope or do you have separate support teams outside FinancialForce and Salesforce to handover tickets if applicable?**

A. Yes, Dell Boomi support will be needed, and is within scope.

Q. **For the "Governorship" scope, are you expecting separate effort outside managed services effort to provide oversight on activities listed there? Is it acceptable to provide shared oversight between Managed Services project and Governance scope?**

A. Governorship will include releases, and code reviews for any other vendors that will provide solutions for our needs. It will be your responsibility to make sure code produced by other vendors meets our current deployment guidelines.

Q. **What is the process of "Customization and App Development" as part of Managed Services? Are these minor enhancements or development projects? Please explain the process of enhancements management.**

A. It can be both enhancements and major development projects like asset management tools, RFP tools, and things like Service Cloud and Marketing cloud. Enhancements are logged and tracked in Jira and discussed/discovery is done during sprint planning.

Q. **As part of Managed Services, do you have L1 and L2 support included? Do you have a separate helpdesk team to perform 1st level of triaging of support requests? Can you explain the current support process?**

A. We have the ability to award the support piece to the winner of the Governorship, or to another vendor. The support winner will work support tickets on a Kanban style board and will need to be approved by the Governorship winner before being released.

Q. **What is the frequency of scheduled production deployment?**

A. Current preference is working in 2-week sprints.

Q. **What is the involvement / role of Managed Services team during deployment?**

A. Managed services will use bit bucket to deploy updates from UAT. This process will include complete oversite of any/all code deployment from any/all other vendors developing on behalf of Visit California. This includes governorship of development branching, peer code review, and ownership of all Visit California Salesforce code deployment.

Q. **Do you have business requirements developed for these projects?**

A. No.

Q. **Is there a timeline of potential new enhancements?**

A. To be determined.

Q. **Can you help clarify how these Salesforce reports and dashboards are different from the custom reports listed in 10.6 Managed Services?**

A. Each team will have a custom dashboard that will appear when they login, and there will be custom reports needed by each team. There are other reports that have been created for specific users, as requested (e.g., the finance team needs custom reports for financial audits).

Q. **Can you provide any additional specificity around automation of all manual processes?**

A. There is a list of processes that different teams manually do that will need to be looked at and solutions for automation created. This includes several processes within the finance department that are exporting and importing .csv files form different systems.

Q. **Are there specific elements of Marketing Cloud that you wish to implement? If yes, over what time frame?**

A. We have limited experience with Marketing Cloud and would require initial discovery to further understand capabilities and application for Visit California.

Q. **Please describe the current tools and techniques that manage marketing activities and campaigns.**

A. We have multiple marketing partners that run our activities and campaigns that will be brought in to discuss with the RFP winner. These include many of the standard marketing tools/techniques used within the industry, and we would like discussion around best practices and recommendations to build a best-in-class Marketing Cloud.

Q. **Does "Customizations and custom app development/maintenance" refer to an existing set of net-new enhancements that need to be completed within a specific time frame? If yes, can you please provide that list of items?**

A. We do have a set of customizations and custom apps which require continued maintenance, as well as continuous new feature enhancements. New feature enhancements are always being recommended and submitted. These requests would be added to our backlog and evaluated for priority in our sprint planning. Current list of customizations and custom apps include, but are not limited to, the following:

- Notice generation and distribution process
- Payable Invoice Voucher Package Generation and Invoice Transactions Upload
- Website Maintenance
- Dell Boomi connections and API's
- Custom Finance Processes
- DocuSign Contract Lifecycle Management App/Objects

Some future customizations and custom apps could include, and are part of Section 10.7, the following:

- Asset Management Tool
- RFP (Issuance Side of RFP) Tool
- Event Management Platform

Attachment C

Q. **In the budget example on pages 25 & 26 of the RFP, new enhancements are included with a % of total. To confirm, the program cost for items in Section 10.7 Potential New Enhancements/Projects would be for reference only and considered as a separate scope or different budget, and as such should not include a % of Total value?**

A. The $800K - $1.2M is our annual estimated budget available for all Salesforce-related costs. This includes governorship and managed services, as well as the potential new enhancements/projects. We understand the difficulty of scoping specific projects identified within the New Enhancements list, which would require detailed discovery with your team. As a result, we are requesting for this RFP you provide bids on the Governorship and Managed services, with the understanding that this is part of the total budget available each year. We plan to focus the award of this RFP on those services, but we encourage you to showcase your skills on the other projects. We welcome you to also quote/bid on the new enhancements/projects at a high-level, understanding those numbers are currently estimates that require refining before becoming enforceable. The budget for the new enhancements/projects would also be part of the overall $800K - $1.2M, and projects may be pushed to future fiscal years when we have additional budget to develop.