

Questions	Answers
What are your key performance indicators (KPIs) related to the Tourism Assessment program?	Key performance indicators focus on tourism rates, payment notices, contact with businesses for questions, data accuracy, and collection efficiency.
Are there any current challenges in collecting and managing assessment data through Salesforce?	We continuously work to enhance automation, data integrity, and system integrations within Salesforce. The notice system also requires many integrations and custom tooling which can be complex to manage.
How does Salesforce Communities enhance the customer experience in the Tourism Assessment Program?	Salesforce Communities allows businesses to securely submit assessment data, track payments, and receive updates. It streamlines processes, improves communication, and enhances transparency for stakeholders.
How does the system currently handle duplicate record prevention, and what improvements are needed?	Data validation rules are in place as well as manual review of conflicts where relevant. Improvements could include additional data validation rules, data cloud identity resolution, and reports highlighting opportunities for de-duplication. We are open to other solutions as well.
What criteria should be used to identify duplicate records?	These will be defined through stakeholder requirements gathering sessions.
What is the preferred method for handling duplicates?	These will be defined through stakeholder requirements gathering sessions.
How do businesses currently submit their financial information, and what challenges do they face?	Documents can be provided after a signed NDA.
Can you describe your current Salesforce setup and how it's being used?	Documents can be provided after a signed NDA.
How frequently are system updates or changes made to Salesforce?	We currently operate on a 5 week sprint cycle with infrequent off-cycle deployments as needed.
How are emails, calls, and chats currently logged in Salesforce?	Documents can be provided after a signed NDA.
What types of emails, calls, and chats would you like to be automatically logged?	Automation of manual data entry tasks that help overall workflow efficiency and reduce the risk of data entry errors.
What information should be included in the automatically created activities?	See above answer.
Do you have any specific requirements for integrating your soft phone technology with Salesforce?	These will be defined through stakeholder requirements gathering sessions.
Describe the current integration landscape between Salesforce and other systems (Example: contract lifecycle management, RFP management, asset management, procure-to-pay, and financial planning and analysis)? Which systems are currently integrated, and which are planned for future integration?	Documents can be provided after a signed NDA.
What are the key pain points with existing system integrations?	Please refer to Section 8 in the RFP for a description of current challenges.
What specific challenges are present in the current Salesforce workflows?	Please refer to Section 8 in the RFP for a description of current challenges.
Are there any specific modules or functions in Salesforce that still need implementation?	These will be defined through stakeholder requirements gathering sessions.
What are the key priorities for automating integrations between all financial systems?	Our priorities include ensuring data accuracy, reducing manual entry, improving reconciliation efficiency, and enhancing real-time reporting.
What are the most critical financial workflows that need improvement?	We aim to enhance automation in invoicing, reconciliation, and reporting to improve efficiency and accuracy.
How does Salesforce currently support customer billing, vendor management, and core accounting functions?	Salesforce is used for invoicing, payment tracking, vendor management, and financial reporting. Additional details may be shared with a signed NDA.
What challenges are you experiencing with integrating your contract lifecycle management system with Salesforce, particularly regarding billing and revenue recognition?	We are working to enhance automation and data consistency between systems. The scope of specific integration improvements will be identified and prioritized throughout the contract through stakeholder interviews.
How do you currently manage asset information and link it to financial records in Salesforce?	Documents can be provided after a signed NDA.
What are the biggest challenges in standardizing and automating communication with tourism industry stakeholders?	The stakeholders we communicate with have varying interests and priorities because they represent many different business categories and stakeholders within the tourism space. The challenge here is aggregating many different touchpoints that are relevant to this stakeholder into one system (Salesforce) and then synthesizing only the most relevant parts that Visit California needs in order to manage that relationship.
How frequently are outside sales meetings and executive presentations conducted?	Daily.
How is data currently gathered and stored from these interactions?	This depends on the type of interaction. Often data is stored in Salesforce, Data Cloud, or Google BigQuery. Additional detail may be shared with a signed NDA.
How do liaisons currently prioritize which stakeholders to contact?	Our Industry Relations team manages a prioritized list of stakeholders for each liaison. Liaisons are contractors who are given a certain degree of independence in their schedules, but are ultimately managed by the Director of Industry Relations.
What criteria are used to assign accounts to liaisons, and what role does the business analyst play in this process?	Visit California has six liaisons who are assigned geographic regions across the state. Accounts within that region could be assigned to the associated liaison. Additionally, we have four other liaisons who work with an assortment of other accounts defined by the Industry Relations team, including contacts at Destination Marketing Organizations (DMOs).
What specific issues are users facing with the Salesforce App?	Additional detail may be shared with a signed NDA. General categories of issues include: user experience enhancements, bugs, integrations, and adoption/training.
What are the major inefficiencies in logging meeting details and updating contact information in Salesforce?	Workflow migration from systems outside Salesforce present a change management challenge. Data quality is also a challenge, as there is a large quantity of data on contacts and accounts to maintain in our system.
What specific dashboards are needed for liaison activity tracking and industry relations management?	We will define the scope of specific projects as they are identified and prioritized throughout the term of this contract. More specifics than what is shared in the RFP itself are not necessary for this proposal's success.
What would an ideal Salesforce-based voting roster management system look like?	These will be defined through stakeholder requirements gathering sessions.
What challenges are faced in capturing email contact activity within Salesforce?	Challenges include ease-of-use for all users, mobile compatibility, integrating email activity across platforms, and adding context to activity records once they're added to Salesforce.
What specific integrations with email, calendar, and tasks would be most beneficial?	Specific integration priorities will be determined as part of the project scope.

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What are the primary limitations of the current Salesforce-to-MailChimp integration?	Additional detail may be shared with a signed NDA.
How does the lack of visibility into data impact campaign effectiveness?	Campaigns require more manual attention to implement and our ability to learn from them is limited without robust data. We're also limited in our ability to personalize our campaigns based on user segmentation and performance without visibility into the data.
What are the main issues affecting data integrity in contact lists?	Common challenges include duplicate records, outdated contact information, and inconsistent data entry practices, which can impact segmentation and communication.
What challenges do siloed data and lack of integration create for decision-making and collaboration?	Siloed data can lead to inefficiencies, misalignment between teams, and difficulties in generating a comprehensive view of customer interactions.
How do you handle data standardization, and where are the gaps in naming conventions and tagging?	Documents can be provided after a signed NDA.
How do you see AI or tools like Salesforce Marketing Cloud helping with data unification and segmentation?	We currently utilize Salesforce Data Cloud to model and aggregate our data. We hope to leverage AI in the near future for use in data cleaning and pulling contextually relevant information for end users. Additional use-cases for AI applications on top of our data would be something that an company awarded this RFP would help us evaluate and implement.
What are the main limitations of your current reporting, and how could they be improved?	Please refer to Section 8 in the RFP for a description of current challenges. Opportunities for improving existing reporting would come from stakeholder interviews and partnership with the company awarded this RFP.
What challenges are you facing in ensuring all teams consistently enter data into Salesforce or connected systems?	Please refer to Section 8 in the RFP for a description of current challenges. Opportunities for improving existing reporting would come from stakeholder interviews and partnership with the company awarded this RFP.
How do you currently define data ownership across workflows, and what gaps exist in this process?	Data ownership is currently defined through SLA documents drafted by the Data & Analytics team and agreed to by data owners for specific processes. We are in the process of developing a Data Governance Board, which would help manage these data ownership expectations and SLAs. Where this information is stored to be easily accessible to the data owner and anyone who has questions/concerns about that data is one of the biggest areas of opportunity.
What is your current approach to maintaining documentation for data processes, and how can this be improved for better historical context?	We use BitBucket for version control around deployments. We also leverage Jira and Confluence for project management and documentation of new processes that are developed.
How would you envision a Data Governance Board supporting alignment on new systems and eliminating redundancy across tools?	A Data Governance Board would help ensure consistency, establish best practices, and streamline data-related decision-making. It would help make sure that each department has an opportunity to participate in the decision making process for new tools and for hearing about updates to existing tools, so everyone is working off of the most recent information.
Will Visit California accept an online/ PDF submission versus 10 printed bound copies?	Please see page 28 in the RFP. Ten hard copies and an electronic/PDF version is required.
What data sets would you ultimately like to incorporate into your data solution? - Where are these data sets located (e.g., on prem, cloud, other SaaS providers)?	Data set integration priorities will be determined based on evolving business needs. These data sets can be located in many different locations ranging from "data" that is currently not being recorded anywhere to a data set on another cloud provider that requires integrations being developed.
What existing reports would you like to modernize?	Key reports will be assessed for modernization based on usability, automation potential, and data accessibility improvement potential.
Aside from Salesforce and Tableau, are there other tools you would like to have access to the data?	Salesforce, Tableau, Data Cloud, Google BigQuery, and the many various other sources of data that we integrate with all need access to our data. We are also continuously assessing tools based on evolving business needs. We may also need to share data with other third party vendors that other teams at Visit California partner with.
Would you like the ability to share the data with other organizations or to make it available to the public?	Yes, on a very specific case-by-case basis this may be desired. The use case will be evaluated and prioritized appropriately.
What type of deployment method is currently in use for Tableau (on-prem server vs. cloud)? Is this the desired method?	Data & Analytics currently uses Tableau Cloud.
What is the current state of the data governance operating model?	We are defining and in the midst of launching our data governance operating model and expect to have a new process with intially scoped policies and procedures in place by the beginning of this contract term. Improving the data governance operating model will be something that this project can assist with, along with partnership with IT and other business units at Visit California.
Are Business Data Owners and Data Stewards identified with an operationalized Data Governance team, or does this project need to enable a data governance operating model?	See above answer.
Does Visit California have data governance policies, standards, and workflows in place today that cover data quality, data catalog, metadata, regulatory compliance, and privacy topics?	See above answer.
What Data Governance/Data Stewardship tools are in place today?	See above answer.
Can you provide more detailed insights into the automation challenges within the Tourism Assessment Program?	Automation efforts focus on improving data accuracy, reducing manual effort, and streamlining workflows. More specific challenges may be discussed with a signed NDA.
Could you elaborate on how customer interactions are tracked and if there are any data privacy concerns associated with integrating these interactions into Salesforce?	Interactions are tracked within Salesforce, adhering to data privacy regulations and security protocols. Compliance considerations guide integration efforts.
For preventing duplicate records and automating activity creation, are there any specific guidelines or rules in place?	Duplicate prevention strategies involve validation rules and automation, with enhancements evaluated as needed.
What specific workflows within FinancialForce are causing challenges?	Please refer to Section 8 in the RFP for a description of current challenges. Opportunities for improving existing reporting would come from stakeholder interviews and partnership with the company awarded this RFP.
Are there additional financial systems, besides those listed, that need to be integrated in the future?	Future integrations will be determined based on business priorities, system capabilities, and a continuously evolving set of business needs and tools.

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For sales meetings and presentations, what are the some of the data points or KPIs you aim to track more efficiently within Salesforce?	Key activities from Visit California programs and engagement with our brand or others in the industry.
Will development staff at Visit California be co-developing features alongside selected vendor? Will this factor into the branching and merging automation strategy?	Yes. Any deployments should happen on our pre-defined, 5 week sprint cycle.
What data governance or compliance considerations should the implementing partner be aware of as part of this engagement?	We are in the process of developing and launching a data governance board, which will define certain policies and procedures that may be relevant to this engagement.
Will Boomi be utilized to perform integrations between the source system and Tableau/Salesforce?	Boomi is one tool at our disposal for integrations. Generally speaking, Tableau and Salesforce are integrated without the need for Boomi.
Are there any systems which already have data required for reporting integrated with Salesforce (i.e. Cvent)?	Yes many systems already have reportable data and many of those systems are already integrated into Salesforce. Enhancements to these integrations or changes to how data is entered can enable more reporting functionality as defined by stakeholder needs.
How many users currently create dashboards and reports within Tableau (i.e. Tableau Creator) or Salesforce CRM?	Visit California currently has 9 Creator licenses for Tableau, including some used as integration users.
Are there specific KPIs that Visit California measures currently, which are the key indicators of the program success? Ex: Total visitors, Length of stay, Repeat vs. New visitors? Will those be the target of this engagement?	Visit California has many different initiatives and each are measured separately and as part of their impact as a whole. This engagement involves helping stakeholders define appropriate KPIs for their initiatives and ensure that they have the tools and workflows that enable measurement and feedback of those KPIs. Some metrics are program performance-based, such as total visitors and number of impressions, while other metrics are focused on data governance and opportunities for workflow efficiency improvement.
Can you share insight into the current licensing for Salesforce including FinancialForce, Service Cloud, CRM Analytics and Data Cloud as well as Tableau and BigQuery? How many seats is Visit California licensed for? It is mentioned that the budget includes licensing allocations, can you share what is allocated for licensing? Is all licensing owned by Visit California or a vendor?	More detail can be shared with a signed NDA on exact license counts across various platforms. If seats are required on these platforms to perform work such as setting up integrations or investigating data, those will be provided by Visit California but should be detailed in the budget proposal. The licenses are owned by Visit California.
Is Visit California working with a third party for Salesforce Development today or are there internal development resources?	We currently have a third party performing Salesforce Development.
What types of internal resources at Visit California will the vendor be working with?	Data & Analytics as well as internal stakeholders for requirements gathering. We have some internal personnel in project management positions that will be the primary points of contact.
Is there existing documentation on the current Salesforce implementation, workflows, etc.? If so, will this information be provided? What project management tools are the team using today?	Documents can be provided after a signed NDA. Various project management tools are available and in-use. Currently Jira and confluence are used by the Salesforce development team, and Visit California is also exploring leveraging Monday.com for other project management use-cases.
Is there an existing development backlog? If so, will that be shared? Is there a local vendor preference? Could you confirm if there is a current incumbent providing these services? If so, can you share the name of the incumbent?	Yes. Documents can be provided after a signed NDA. Yes. Yes, the incumbent is currently providing these services. We do not disclose this information to create a fair and competitive proposal environment that is not biased or swayed.
What California contract vehicle will be used for this effort? We hold several contract vehicles and would like to understand if a specific vehicle will be required for award. What was the annual spend for the previous year on this project?	If we understand your question, please see our contract template located here: https://industry.visitcalifornia.com/about/request-for-proposals This information is not disclosed. Please assume a regular spend based on the budgeted amount found in the RFP.
Are you open to a hybrid delivery model with a mix of offshore and onshore resources? Will the work be onsite or remote?	Yes. Visit California does not require or expect the vendor onsite outside of special ceremonies which will be planned on an as-needed basis.
Can you elaborate on the key success metrics for this engagement?	Please refer to Section 8 in the RFP for a description of current challenges and opportunities for future state.
What are the biggest challenges you currently face with your data and analytics infrastructure? Are there any specific pain points with the existing Salesforce implementation that you want to address?	Please refer to Section 8 in the RFP for a description of current challenges. Please refer to Section 8 in the RFP for a description of current challenge.
What level of customization exists in your current Salesforce setup (e.g., custom APEX code, integrations, workflows)?	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. We have integrations with Boomi, PNC Bank, 2 external website databases (drupal), CVENT, Mailchimp, Airtable, Sprout Social, utilizing both custom code API integrations and OOTB package integrations.
Can you provide a high-level architecture diagram of your current data ecosystem? What are the most critical integrations between Salesforce and other platforms? How do you currently manage data governance, and what improvements do you expect?	Documents can be provided after a signed NDA. Please refer to Section 8 in the RFP for a description of current challenges. We are defining and in the midst of launching our data governance operating model and expect to have a new process with intially scoped policies and procedures in place by the beginning of this contract term. Improving the data governance operating model will be something that this project can assist with, along with partnership with IT and other business units at Visit California.
What version of Salesforce are you using, and do you have any restrictions on adding third-party apps?	We use Salesforce lightning version, with Sales Cloud, Experience Cloud, Service Cloud, CRM Analytics, Data Cloud. You currently do not restrict 3rd party apps and have multiple third party app integrations (see prior question).
Are there any known limitations in your current Salesforce implementation?	Please refer to Section 8 in the RFP for a description of current challenges.

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How do you handle user administration, and what levels of access control exist today?	Data & Analytics combined with IT manage access controls across most software systems in place at Visit California. We have an SSO provider for general logins and most platforms contain role-based access controls, allowing Visit California to define user permissions based on roles and responsibilities for their team or for external parties who need access to a limited set of data.
What are the key reporting and dashboarding challenges you need solved?	Please refer to the RFP.
Are there any constraints (budget, technology, regulatory) that we should be aware of?	Please refer to the RFP.
Do you have a preference for an onshore, offshore, or mixed delivery team? If mixed, what is the preferred ratio?	Please see answer below.
Do you have a roadmap for potential future enhancements like AI and automation?	Yes, there is an existing roadmap including some already scoped enhancements and AI opportunities. We would look to refine the specifics of this roadmap and continue building it out with a longer time horizon with the selected vendor.
Are you open to recommendations on new tools, or is the tech stack fixed?	Yes, we are open to recommendations.
What are your biggest priorities for data-driven decision-making?	Our biggest priorities for data-driven decision-making include improving data accuracy, enhancing reporting and analytics, and increasing automation for more efficient insights. We aim to centralize data across systems, provide real-time access to key metrics, and ensure stakeholders have the right tools to make informed decisions.
How do you envision AI and automation improving your current processes?	Please see the answer below.
Are there any initiatives for predictive analytics, machine learning, or personalization?	Yes, though many are future state and the winner of this RFP will help Data & Analytics define the approach and then implement the appropriate steps to implement those ideas.
"Visit California will fund the annual contract to \$1,500,000 – \$2,500,000 (USD)" Could Visit California kindly confirm whether this budget is intended for the specific project over its entire duration?	This is the annual budget for the full fiscal year (July 1, 2025 – June 30, 2026). We reserve the right to renew and make adjustments to the scope of future contracts for a total of 3 years.
Could Visit California kindly specify the budget allocated for the first year?	We are looking for a proposal funded between USD\$1,500,000 - \$2,500,000 as part of this RFP.
Could Visit California kindly clarify if the Minimum Requirements can be fulfilled through a subcontractor?	The use of Subcontractors is allowed to help cover minimum requirements. Your organization, however, is still held accountable and will take full responsibility for the performance of any/all subcontractor work. If you are going to use any subcontractors, we ask that you disclose this in your proposal, including how they will support you in this engagement.
Could Visit California please clarify if there is a page limit for the resumes?	No. However, please respect these are being reviewed by our committee and a respectful length is appreciated.
Could Visit California please clarify if the United States Internal Revenue Service (IRS) Form W-8BEN-E or W-9 is a post award requirement?	Should you be selected, this can be addressed through the contract phase.
Could Visit California kindly clarify whether the attachments should be submitted separately or included as part of the proposal response?	Please include required attachments as outlined in the RFP.
Could Visit California kindly clarify if the financial statements can be submitted via email only?	Financial statements may be submitted electronically or mailed in a sealed envelope to address within the RFP, see page 28.
Could Visit California kindly clarify if the 10 hard copies can be submitted in a single envelope?	Yes, if your proposals can fit in one envelope. Please note we will share your individual hard copies with each member of our committee.
Could Visit California kindly provide clarification on the location of the standard Contract Template, as it is not found through the provided link?	Please see link to contract template and page 26 of the RFP, https://industry.visitcalifornia.com/about/request-for-proposals
Could Visit California please kindly grant an extension for the due date submission?	No.
Is the utilization of subcontractors permitted by Visit California for this project?	The use of Subcontractors is allowed to help cover minimum requirements. Your organization, however, is still held accountable and will take full responsibility for the performance of any/all subcontractor work. If you are going to use any subcontractors, we ask that you disclose this in your proposal, including how they will support you in this engagement.
Could Visit California please clarify if it is allowed to use digital signatures?	We use DocuSign E-signature for our electronic signature process.
Is there any incumbent associated with this project? If so, please disclose the name.	Yes, the incumbent is currently providing these services. We do not disclose this information to create a fair and competitive proposal environment that is not biased or swayed.
If the resources we provide at the time of proposal submission are not available at the time of a potential contract award, could firms replace them with equally qualified resources?	We would expect that the resources you are proposing to use for this engagement would be the same when we start work, especially if they are a critical element to the success of the engagement. If, at the time we start work, individuals are not available for the project, we would expect equally qualified resources to be available, which we are allowed to review and approve before them joining the team.
Could Visit California please confirm that we can fill out proposal forms electronically?	Ten hard copies and an electronic/PDF version are required. Please see page 28 of the RFP.
Does Visit California accept remote resources to work on the project?	We support the utilization of remote workers provided they can: 1) consistently deliver tasks within established deadlines, 2) actively participate in meetings scheduled during Visit California's business hours (PST), and 3) operate from secure locations that ensure data integrity and confidentiality.

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Is it allowed to use subcontractor references?	The use of Subcontractors is allowed to help cover minimum requirements. Your organization, however, is still held accountable and will take full responsibility for the performance of any/all subcontractor work. If you are going to use any subcontractors, we ask that you disclose this in your proposal, including how they will support you in this engagement.
Could Visit California please clarify, if firms can provide commercial references?	Yes, this is ok.
Could Visit California please clarify, if firms can provide references for ongoing contracts?	Yes.
Does Visit California accept offshore resources to execute the project?	We support the utilization of offshore resources provided they can: 1) consistently deliver tasks within established deadlines, 2) actively participate in meetings scheduled during Visit California's business hours (PST), and 3) operate from secure locations that ensure data integrity and confidentiality.
In case firms are submitting confidential information in the response, is it required to provide a redacted version?	No. However, to protect both parties, we do encourage you to sign an NDA.
Can Visit California provide more details on the current state of your Data & Analytics Program roadmap? Are there specific milestones or objectives already outlined?	See above answer.
What are the key challenges or pain points you currently face in your data program that you want to address with this engagement?	Please refer to Section 8 in the RFP for a description of current challenges.
Are there any compliance or regulatory requirements that we should consider while developing and maintaining the data strategy?	Please refer to the RFP for these compliance considerations as they are needed in your response to this RFP.
Can Visit California elaborate on the non-standard SFDC development and workflows currently in place? Are there any specific customizations that require special attention?	Documentation on specific workflows within Salesforce can be provided with a signed NDA.
What level of automation do you envision for enhancing processes within the organization? Are there specific workflows you want to automate?	Automation is a north star for us on the Data & Analytics team because it enables higher levels of data quality, more data collected, and improved efficiency for team members who were previously doing manual data entry processes. Identification of specific workflow opportunities will be scoped and prioritized through stakeholder interviews as part of this engagement.
How frequently does Visit California integrate Salesforce data with other platforms, and what are the key integration points (e.g., real-time vs. batch processing)?	Visit California uses a mix of real-time and batch processing schedules for its integrations. For the majority of processes, batch processing is sufficient for Data & Analytics needs with a frequency of daily. Some data sources require much less frequent updates for various reasons, such as the data source only being updated once per year when a new report/publication is released.
Is it required to integrate data from Salesforce and other systems into BigQuery?	Yes.
How many years of historical data do you have in different systems and what is the size of the data?	Each system is different depending on the source and specific fields in question. Some sources extend 15+ years of historical data, while others have only been collected since the inception of Salesforce in the last approximately 5 years, or as new capabilities are added to our Salesforce deployment.
Is there any data quality issues in the source systems?	Please refer to Section 8 in the RFP for a description of current challenges.
Does Visit California have existing data governance policies in place for managing data integrity and security between Salesforce and integrated platforms?	We are defining and in the midst of launching our data governance operating model and expect to have a new process with initially scoped policies and procedures in place by the beginning of this contract term. Improving the data governance operating model will be something that this project can assist with, along with partnership with IT and other business units at Visit California.
Can Visit California provide details on the current Tableau dashboards and reports? What enhancements or new features are required?	Documentation on existing dashboards and reports can be provided with a signed NDA. Enhancements will be scoped out and prioritized through stakeholder interviews on an ongoing basis as part of this engagement.
How do you currently handle data modeling, data transformation, and visualization within Tableau and BigQuery?	Generally speaking, Salesforce and Data Cloud are used as our primary data warehouse/data lake. Google BigQuery is used for exploratory data analysis and for facilitating connectivity with certain systems such as Google Analytics. Tableau is used for data visualization and exploratory analysis along with other visualization tools such as CRM Analytics in Salesforce, Query Editor in Data Cloud, and Salesforce Reports. Additional detail can be provided with a signed NDA.
What are the key KPIs and business metrics that need to be monitored through Tableau dashboards?	Visit California has many different initiatives and each are measured separately and as part of their impact as a whole. This engagement involves helping stakeholders define appropriate KPIs for their initiatives and ensure that they have the tools and workflows that enable measurement and feedback of those KPIs. Some metrics are program performance-based, such as total visitors and number of impressions, while other metrics are focused on data governance and opportunities for workflow efficiency improvement.
What is your current process for managing development branches, peer review, and deployment in Salesforce and Tableau?	We use BitBucket for version control around deployments. We also leverage Jira and Confluence for project management and documentation of new processes that are developed. We have multiple sandbox environments in our systems to facilitate QA, UAT, and Production deployment.
Does Visit California follow a specific development methodology (e.g., Agile, DevOps) for implementing new features and enhancements?	Agile.
Are there any specific CI/CD (Continuous Integration/Continuous Deployment) tools or processes in place?	See above answer.
What challenges have you faced in ensuring full user adoption of Salesforce and Tableau?	Full user adoption of Salesforce and Tableau has been challenging due to data quality issues, system complexity, and resistance to change. Integration gaps and a preference for manual reporting limit efficiency and adoption. Stronger training, improved integrations, and executive support are key to increasing usage.

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What level of training and support do you expect from the selected vendor for both technical and non-technical staff?	Training as needed for new tools introduced and new workflows that are focused on user adoption as well as a period of hypercare after deployment to ensure that the workflow is operating as intended and the target stakeholders are able to use the system.
Does Visit California require ongoing user training sessions, documentation, or a knowledge base for self-service learning?	Yes.
Does Visit California have a defined budget range for this engagement?	Please refer to the RFP.
What is the expected duration of the initial contract, and are there any planned renewals or extensions?	The initial contract is for 1 full year (July 2025 - June 2026) with the option to extend for a total of 3 years before another RFP will be required.
Are there any urgent deadlines or priorities that the partner should focus on during the initial phase of engagement?	Visit California's Referendum occurs in December 2025 and Data & Analytics has certain obligations for support and reporting prior to the Referendum, during the month of December, and afterwards as we read-out results and provide analysis and insights based on the findings.
Is it mandatory for firms to have experience in tourism?	No.
It should be based on a full year of activities.'- Could VC please explain what ' full year of activities ' means?	The contract would span the fiscal year July 2025 - June 2026.
Provide a letter of interest and executive summary of the proposal.'- Are firms supposed to combine these two together or a separate letter and executive summary?	Either is acceptable.
Provide a description of the nature of the proposer's services and activities.'- Could VC please explain if firms have to mention all the services they provide in this section?	Please provide a summary of the relevant services you have to offer in the scope of this engagement. As well as introduce the strength and ability of your firm.
Are resumes included in the page limit? If yes, can firms add resumes in the appendix?	No. However, please respect these are being reviewed by our committee and a respectful length is appreciated. Yes.
Is it mandatory for firms to have prior experience with Salesforce? Does it have to be from a government client?	Yes, a large majority of the work will be related to Salesforce and their products. No, prior experience does not need to be from a government client.
Are firms supposed to provide references in their response? If yes, then how many?	Yes, please provide at least 2-3 references.
Will there be a preference for Milwaukee-based local firms?	No.
Experience in technical writing and procedural documentation.'- Could Visit California please confirm if this requirement is for the vendor or its key personnel?	The engagement will require your team to draft technical and procedural documentation. How your firm decides to meet this requirement is up to you, but it is a requirement.
Solutions Architecture experience.'- Could Visit California please confirm if this requirement is for the vendor or its key personnel?	This engagement will require a member of your team on our engagement to have solutions architecture experience.
Is it mandatory for all team members to be PMP certified?	No.
Can firms utilize commercial experience to comply with the requirements mentioned in section 9.5?	Yes, any experience pertaining to the defined scope is acceptable, regardless of industry.
Can firms utilize a subcontractor and use their experience to comply with the minimum requirements?	The use of Subcontractors is allowed to help cover minimum requirements. Your organization, however, is still held accountable and will take full responsibility for the performance of any/all subcontractor work. If you are going to use any subcontractors, we ask that you disclose this in your proposal, including how they will support you in this engagement.
Can firms who have no experience with non-standard SFDC implementations and development with custom APEX code bid on this RFP?	Yes, but Visit California has many standard SFDC components and will need a partner that can both manage and develop on these as well.
If the prime vendor does not comply with the minimum requirements, will they be disqualified?	Yes, minimum requirements are necessary to fulfill this engagement. You may use subcontractors as part of your proposal to fulfill these minimum requirements.
Are prime vendors and subcontractors both required to provide case studies in the response?	We request case studies to be submitted for relevant work to show you can satisfactorily fulfill the scope of this engagement. This can come from you or a subcontractor.
Can the proposal be submitted as a Microsoft PowerPoint file or will another format be required?	Please submit your electronic proposal as a PDF or flat file, along with your ten hard copies.
Is there an anticipated or preferred resource mix (i.e. discipline, onshore/offshore)?	Given the partnership aspect of this engagement, Visit California is expecting a significant amount of staff to be in a similar timezone and available to engage.
Aside from Data & Analytics, are there any other business unit roadmaps for Visit California that should be considered in our RFP response?	For the purpose of the RFP, no other business unit roadmaps do not need to be considered.
Current Challenges: - Limited automated activity creation for email, calls and chats – what can be automated currently and what are the greatest gaps? - What specific data points are collected from businesses via Salesforce Communities, and how is this data currently validated?	Documentation can be provided with a signed NDA.
Potential future state: - Improve customer experience through additional access to account details and business stats – please provide a sample list of types of customers for planning purposes - Automated business acquisition processes –please describe the manual steps in the current process?	Customers could include Liaisons, executive team members at Visit California, and anyone else engaging in stakeholder conversations with industry members or representatives. Customers could also include assessed businesses who might engage with our data directly through our industry website. For details on manual steps in our current process, additional documentation can be provided with a signed NDA.
Current Challenges: - Describe which systems are offering the greatest challenges currently, any blocks between systems and any automation in place, whether active or not. - Current state of Salesforce workflows –Please elaborate on the current state and challenges with Salesforce workflows	Please refer to the RFP for description of the current challenges. Additional detail can be made available with a signed NDA.
Potential future state: - Automated integrations between all financial systems. - Other than Salesforce, what other systems are sources of financial data? - Complete implementation of ancillary functions and modules in Salesforce. - What high-value functions/modules have been identified?	Financial data is sourced through sources including Salesforce, PNC bank, VENA, Docusign, and other external reporting tools. Some high value modules include enhancing revenue recognition, multi-entity consolidation, and automated invoicing.

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Questions	Answers
<p>Outside Sales Meetings Current Challenges:</p> <ul style="list-style-type: none"> - Inconsistent route building: - What factors contribute to inconsistencies in building liaison routes? Consider system limitations, data accuracy, manual processes, or external dependencies that may impact route planning. - Dependence on business analyst: - What specific tasks require the involvement of a business analyst? - Salesforce App issues: - What specific issues are occurring with the Salesforce App, and how do they affect user experience and data accuracy? Have any alternative tools been considered or identified? - Lack of dashboards: - Are there existing dashboards in place? If so, what key metrics are missing, and how do these gaps impact decision-making or performance tracking? - Email contact activity: - What sources are generating email contact activity, and what factors are making it difficult to integrate or capture in the CRM? Is MailChimp being used for this purpose as well?" 	<p>Liaison route building is confounded by the effort to integrate appropriate software solutions, accuracy of address data, and factors that are log currently available in a structured data format such as availability of stakeholders along the route.</p> <p>Business analysts assist in data validation, reporting, and optimization of workflows. They proactively identify trends in the data that could be indicative of problems or opportunities that need to be surfaced to the appropriate teams for prioritization.</p> <p>The Salesforce app has inherent limitations and integration challenges as well as ongoing maintenance or updates that need to be monitored and then decision makers need to be educated.</p> <p>Documentation on existing dashboards can be provided with a signed NDA. Generally speaking, few dashboards exist and we mostly rely on Salesforce reports to pull data when the data fits the structure requirements for those reports.</p> <p>Outlook is what Visit California uses for email communication on an individual basis. For mass email communication and campaigns, we have multiple email services that are used.</p>
<p>Potential Future State:</p> <ul style="list-style-type: none"> - Standardized contact lists: -Are there any existing rules or processes for these contact lists? - Social media integration: - What specific social media insights is Visit California looking to gain by integrating with stakeholders' social media accounts? For example, are they interested in metrics like visitor propensity, sentiment analysis, or other engagement trends? - Targeted sales meetings: - How is the targeting expected to take shape? - SF Meetings Route: - Does Visit California's current Salesforce setup have the necessary data and features to build meeting routes? - Advanced mapping: - What is the ideal state for advanced mapping capabilities? How should they help identify and connect with stakeholders along a route? 	<p>Yes contact lists are created through existing rules and processes, the specifics of which can be shared with a signed NDA.</p> <p>Social media integration refers to the presence that Visit California currently has on social media. Being able to measure and report engagement of each post as well as which stakeholders are mentioned in posts directly through tags or indirectly through some shared special interest. We are also interested in helping to measure the performance of bigger Visit California campaigns based on the content of each social media post relevant to that campaign.</p> <p>Targeted meetings occurs through analysis of contact lists combined with the available data that would lead to the highest likelihood of a successful meeting as measured by various metrics such as sentiment scores, voting data, and survey data.</p> <p>No, our current setup does not include building meeting routes in Salesforce.</p> <p>Mapping capabilities should support route creation and schedule planning for internal Visit California stakeholders. Additionally mapping should enable us to quickly gauge relevant assessable businesses within a specified geographic area to assist with list creation (e.g. quickly figure out which businesses may be affected by a nature disaster).</p>
<p>Executive Presentations to Tourism Related Groups and Organizations</p> <p>Current Challenges:</p> <ul style="list-style-type: none"> - Manual data gathering: - What specific data is gathered manually? What sources are involved? - Gathering and reporting lack of standardization: - What methods are currently used for gathering and reporting data? Who is responsible for collecting and uploading it? - Lack of data visibility: - What challenges exist in data visibility, and what blockers impact accessibility? Which groups are most affected?What key data is not available enterprise-wide, and where is it currently stored? 	<p>Manual data collection happens across many different teams at Visit California as they perform their tasks. Part of the challenge with gathering data sources and automating processes is approaching each of these sources as new opportunities for workflows in Salesforce or integrations with unique tools that are being used by a single team for their processes.</p> <p>Visit California's Call for Content process as noted in the RFP means that most business units could benefit from more standardized data collection efforts as this would benefit both the teams currently managing manual data entry processes and benefit the entire organization as they would have greater transparency into the data that has been loaded into a structured system.</p>
<p>Potential Future State:</p> <ul style="list-style-type: none"> - Data attached to records: Is any key data missing from account and contact records beyond manually gathered electronic and non-electronic data? 	<p>We will discover, based on stakeholder interviews and requirements gathering sessions and data design conversations, what additional data is necessary in order to solve our use cases.</p>
<p>Mail and Email Campaigns Current Challenges:</p> <ul style="list-style-type: none"> - Data integrity: What specific data integrity issues are currently being experienced? - Data analyst assistance: What specific tasks require a data analyst's assistance? What level of effort is currently expended on these tasks? 	<p>Duplicate records, inconsistent tagging, and incomplete contact profiles.</p> <p>Data segmentation, campaign performance analysis, and reporting.</p>
<p>Potential Future State:</p> <ul style="list-style-type: none"> - Staff self-service: What types of data will staff need to self-serve? Are any current tools satisfying data self-service in other capacities? - Campaign insights: What specific campaign insights and results are expected from Salesforce? Are there key performance metrics, engagement trends, or attribution data that need to be tracked? 	<p>Our goal is that staff should eventually be able to self-serve many insights into data and have visibility into the activities that Visit California is performing.</p> <p>Having campaign performance insights allows Visit California to make informed, timely decisions on campaign performance and stakeholder outreach.</p>
<p>Current Challenges:</p> <ul style="list-style-type: none"> - Lack of proactive reporting: What trends or opportunities are currently being missed in reporting? Please provide examples of insights that are delayed, and thus making it harder to act on? 	<p>Proactive reporting on data quality as well as "push" reporting showing data alerts and performance insights no a regular basis (i.e. daily or weekly flash report of Liaison meetings).</p>
<p>Potential Future State:</p> <ul style="list-style-type: none"> Regular reports and analyses: What key business decisions should regular reports and analyses support? 	<p>All business units at Visit California could benefit from Data & Analytics support and regular reporting that standardizes manual processes. Specifics on priority and scope will be determined through stakeholder and executive interviews.</p>

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Questions	Answers
<p>Current Challenges: - Limited documentation: How is documentation currently stored and surfaced? - Organizational alignment: Are there any systems creating particular challenges in achieving organizational alignment?</p>	<p>Data & Analytics utilizes Confluence for documentation as well as Monday and Jira for project management, often containing documentation. SharePoint and other file sharing solutions contain documentation as well.</p> <p>Often the having multiple systems creates a challenge in terms of standardization and adoption from end-users who may have a preference for another system or who have a lot of historical data that needs to be accounted for in any transition.</p>
<p>What are the current ETL processes into Salesforce Data Cloud and BigQuery? Specifically, what tools are used, and what is the data volume and velocity? What is VCA's current adoption of AI?</p>	<p>Data Cloud and Google BigQuery have a native data connector that allows BigQuery to query Data Cloud data with zero-copy capabilities. We have not yet finished implementing the two-way connection where BigQuery will push data back into Data Cloud, but this is underway.</p> <p>Additional detail is available with a signed NDA.</p> <p>With regard to AI, please refer to the answer below.</p>
<p>Can the work be performed remotely and offshore?</p>	<p>Yes.</p>
<p>There are invoicing and reporting requirements, but no details on staff performance metrics. What are the expectations for productivity and efficiency benchmarks? Will there be periodic performance reviews for contracted staff?</p>	<p>Vendor performance will be evaluated on an ongoing basis throughout the engagement. This will be based on performance at the project level, and Visit California will expect the vendor to hold its staff accountable in order to meet those project-level obligations. We are not responsible for vendor staff training. Visit California will work with project coordinators from the selected vendor to handle individual performance challenges or interpersonal issues on a case-by-case basis.</p>
<p>The budget is \$1.5M–\$2.5M, but it's unclear how much is allocated for staffing versus technology. What percentage of the budget is expected to be allocated to staffing? Are benefits or other costs (e.g., travel, training) expected to be included in the staffing budget?</p>	<p>Technology costs for systems such as Salesforce and Tableau are separate from this RFP. A large portion of the contract should be on staffing as the selected vendor would provide staff that would perform work including but not limited to project management, Salesforce development, documentation, new product evaluations, and more. If training is required on behalf of the vendor's staff to perform work included in the scope of any signed contract that will not be included in this budget unless otherwise stated. Additional details on the allocation should be made in the proposal.</p>
<p>Does the "Potential Future State" for each item describe the end-state of this project as you see it today?</p>	<p>It is unlikely that all potential future state ideas will be possible to enact over the course of this project. We hope to achieve many of these throughout the engagement and build a roadmap that allows us to make progress towards those that are not yet attainable within the timeframe we are working in for this specific contract.</p>
<p>Regarding "Custom Built Billing Platform" - Do you envision this being entirely custom or built on top of FinancialForce? As you see it today, will the web portal run through a Salesforce Partner Portal or has a technology decision not yet been made here?</p>	<p>The end state will be dictated based on an analysis of capabilities and product offerings combined with other business priorities. As of now it is likely that our existing integrations with FinancialForce would be a logical foundation for us to invest in further as our billing platform.</p>
<p>Does this constitute the entirety of this RFP and is part of a larger project described in the preceding Key Business Processes, of which you have additional RFPs out? Or, are all other Key Business Processes in service of a broader data & analytics initiative and therefore are requisite work contained in this RFP?</p>	<p>Visit California has multiple other vendors and RFPs for various business units and their unique priorities. Sometimes these priorities overlap and in the course of supporting Data & Analytics, the selected vendor for this program will work with a selected vendor from another team's RFP.</p>
<p>The use of subcontractors is permitted but requires approval. Are there any restrictions on offshore staffing or outsourcing? Will Visit California conduct background checks on all personnel, including subcontractors?</p>	<p>The use of Subcontractors and offshore staff is allowed to help cover minimum requirements. Your organization, however, is still held accountable and will take full responsibility for the performance of any/all subcontractor work. If you are going to use any subcontractors, we ask that you disclose this in your proposal, including how they will support you in this engagement.</p> <p>Visit California will not conduct background checks on your personnel. However, we do expect the any agency to comply with all labor law requirements.</p>
<p>Do you have a roadmap for data integration, reporting, and analytics over the next 12-24 months, and if so, how does it align with your broader strategic goals?</p>	<p>Yes the Data & Analytics team has a roadmap over the next 24 months that aligns with overall Visit California strategic goals.</p>
<p>Could you provide an overview of the data platforms and systems currently in use across your organization, and explain how they are (or are not) integrated with Salesforce?</p>	<p>Please refer to section 7: Current Infrastructure in the RFP for a list of existing systems. Many of those systems listed are already connected in some capacity to Salesforce but may require some enhancements to pull or push all necessary data with Salesforce/Data Cloud.</p>
<p>What processes do you currently follow to consolidate data from multiple platforms?</p>	<p>The process depends on which platforms we're connecting and what the purpose of consolidation is. Additional detail on specific workflows can be provided with a signed NDA, but generally these processes utilize Data Cloud as a centralized data warehouse and take advantage of many of the out of the box connectors built into Data Cloud.</p>
<p>Do you maintain a log of all existing reports and dashboards, including their build times, target audiences, and usage metrics? If not, would assessing and defining the reporting requirements for "Visiting California" fall within the project scope?</p>	<p>We do maintain documentation on Data & Analytics reports and dashboards, though are hoping to expand this documentation. This certainly would fall into the project scope.</p>
<p>Is there a preferred low-code platform (e.g., Alteryx, KNIME) or programming language (e.g., Python, R) being utilized for AI and analytics within your organization?</p>	<p>Current AI/ML adoption is minimal and we are looking to expand as part of our roadmap. We are open to recommendations based on skill and integration capabilities for which tools to use to enable AI. Salesforce Data Cloud and Tableau already provide some low-code capabilities with regard to AI and we are beginning to explore those.</p>
<p>Are all personnel assigned to the account required to be based in the U.S., or can they be located in other global offices (e.g., Canada, India)?</p>	<p>Not all personnel need to be based in the U.S., but a mix of onshore vs offshore personnel is preferred, with considerations around logistics for communication and thought partnership outside of purely developing code-based solutions.</p>
<p>Will the project include training aimed at fostering a data-driven culture within the organization, particularly in areas such as data governance and quality standards?</p>	<p>Yes.</p>

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Questions	Answers
Do you prefer to develop in-house AI models, or would you be open to utilizing pre-built AI solutions from the agency or other providers on a licensed basis?	We are open to recommendations based on capabilities of the vendor.
Do you have incumbent vendors currently providing maintenance and/or enhancement services for any of the in-scope solutions?	Yes, the incumbent is currently providing these services. We do not disclose this information to create a fair and competitive proposal environment that is not biased or swayed.
For Biddable Services, are vendor expected to submit proposals for all of the services, or will VCA consider proposals for portions of the biddable services?	We will consider proposals for portions of the biddable services if not all services are able to be provided. Please clarify which sections were omitted intentionally and why in your proposal.
For Managed Services, can VCA confirm that hosting of these existing solutions is not part of the scope of services?	Correct.
If there are potential exceptions or requests to change the terms and conditions, are such changes required to be submitted as part of the RFP response, or is there an opportunity to negotiate such exceptions/changes later in the process?	Should you be selected, this can be addressed through the contract phase.
Can VCA elaborate on if or how Google Cloud services are currently being utilized, particularly BigQuery and/or Google Analytics	Yes, Visit California utilizes Google Cloud Services, including BigQuery and Google Analytics among others. Additional detail can be shared with a signed NDA.
Are the budget line costs intended to be a fixed price deliverable, or a T&M not-to-exceed total that is based upon the hourly rates of the staffing budget?	Visit California may employ a selected vendor for specific projects within the scope of this RFP or for all of them. The agile framework in which we work aligns best to a T&M type contract, but with discrete projects that would be scoped and prioritized with set deadlines. The contract will set expectations around deliverables in a T&M contract that includes regular risk assessments to progress or performance issues.
How do you define "full user adoption" in terms of Salesforce and other integrated platforms?	Full adoption is measured by active usage, process adherence, and data accuracy across teams. This will be evaluated on a workflow-by-workflow basis, such that if a workflow has been developed in Salesforce or another system, we should strive for full user adoption for any relevant stakeholder to that process. The selected vendor will facilitate this through stakeholder requirements interviews, training, and hypercare after deployment.
Are there any existing roadmaps or strategic plans for the Data & Analytics Program that we should align with?	Yes there is an existing roadmap including some already scoped enhancements and AI opportunities. We would look to refine the specifics of this roadmap and continue building it out with a longer time horizon with the selected vendor. The RFP sections on "potential future states" contains details on those roadmaps for use in this proposal. Additional roadmap details may not be necessary at this time for the proposal but could be shared with a signed NDA
What is the current level of AI/ML adoption, and do you have a roadmap for further AI integration?	Please see above answer, line 199. Current AI/ML adoption is minimal and we are looking to expand as part of our roadmap.
What are the biggest bottlenecks in data flow across different systems (Salesforce, BigQuery, FinancialForce, Tableau, etc.)?	The biggest challenges are laid out in section 8 of the RFP. Generally speaking these include change management - moving manual data entry processes (from siloed or unstructured data sources) into structured workflows that are comparable. This is a long process of stakeholder interviews and user acceptance testing/refinement to ensure a smooth transition and few issues with adoption.
What real-time data processing capabilities do you currently have, and what improvements are expected?	Documentation can be provided with a signed NDA.
Are there any external APIs or third-party data sources that must be integrated with the new solution?	Please refer to the RFP. Generally speaking we will prioritize and scope the necessary integrations on an ongoing basis through stakeholder interviews to determine priority.
Do you have a standardized data model for reporting across departments? If not, what challenges exist in establishing one?	We're leveraging Salesforce Data Cloud to create a standardized data model. It is not currently leveraged by all departments but we are working towards bringing on additional use-cases and departments to benefit from this single data model. That expansion and adoption is part of the key focus areas of this engagement.
What are the biggest gaps in reporting capabilities, and who are the primary users of reports?	Please refer to section 8 in the RFP for a description of current challenges.
What data governance framework do you currently use?	We are defining and in the midst of launching our data governance operating model and expect to have a new process with initially scoped policies and procedures in place by the beginning of this contract term. Improving the data governance operating model will be something that this project can assist with, along with partnership with IT and other business units at Visit California.
Can this project be delivered using a hybrid Onshore/Offshore model?	Yes.
Which data sources would you prioritize for the first phase of implementation? Additionally, what is the expected timeline for completing the end-to-end solution?	Data sources will be prioritized through stakeholder reviews and based on an evaluation of the level of effort. Some data sources already anticipated on the list to be worked on include: Bynder, Google Analytics, and Mailchimp. We'll also include sources that are currently integrated to some capacity but need to be enhanced to fully reap the benefits such as CVENT, Airtable, and Sprout Social.