

January 25, 2023
Rhode Island Commerce Corporation
REQUEST FOR PROPOSALS

Solicitation Number: **RFP-2301**
ADDENDUM NO. 1
Questions & Answers

REQUEST FOR PROPOSALS

Salesforce Consulting Services

The Rhode Island Commerce Corporation (“Corporation”) seeks proposals from qualified firms to provide on-going support for system maintenance, system upgrades, and minor fixes for the Corporation’s Salesforce CRM system.

Question 1: Will there be other vendors maintaining/building applications on the Salesforce platform at your company?

Answer: No.

Question 2: What Agile tools (e.g., Jira, Confluence, Slack, etc.) does the Company currently use to support iterative development?

Answer: There are no Agile tools currently in use.

Question 3: Do you use any tools for version controlling?

Answer: No.

Question 4: Is there a Salesforce Multi-Org Strategy in place or being implemented?

Answer: No.

Question 5: How many End users are using the Salesforce platform?

Answer: The Salesforce platform includes 30 internal licenses on the Sales & Service Cloud.

Question 6: How many internal users and what are their license types?

Answer: Please refer to the answer for Question 5.

Question 7: How many External Users and what are their license types?

Answer: No external users currently on our Salesforce platform.

Question 8: Are any released cycles and processes defined?

Answer: No release cycles are currently defined.

Question 9: Do you have any integrations with Salesforce? If yes - What middleware or integration platforms (e.g., MuleSoft) are already in use or planned to be used for integration?

Answer: D&B Optimizer

Question 10: Is there a centralized team managing identity, authorization, and authentication for all the salesforce applications or every application is managed by a different team.

Answer: No.

Question 11: Is there a requirement for tracking the changes to a particular field on a Salesforce Object?

Answer: No, not currently.

Question 12: What tool is being used for Salesforce Release Management (e.g., Copado, Gearset, Salesforce DX)?

Answer: None currently in use.

Question 13: Is there a third-party solution in place for Cloud encryption gateway technologies? (e.g., Shield)

Answer: No

Question 14: Is there a Salesforce test automation or testing framework currently in use?

Answer: No

Question 15: Do you use any Help desk ticketing tool? If yes – please name them.

Answer: No, aside from services offered by the Salesforce Premier Success Plan.

Question 16: Do you have support level severity defined?

Answer: No

Question 17: Can you elaborate between declarative and programmatic customizations implemented at your company?

Answer: The majority of customizations implemented have been declarative.

Question 18: Is your salesforce instance lightning enabled?

Answer: We currently have 2 licenses enabled for testing

Question 19: How are changes tested in your Salesforce instance before being deployed to Production?

Answer: Modifications are tested in a Salesforce Sandbox when applicable.

Question 20: How do you move changes between Salesforce environments?

Answer: When applicable, modifications are moved from the Salesforce Sandbox to Production.

Question 21: Do you mostly require technical or admin/user related support services? If you can differentiate in percentage?

Answer: Primarily technical related support services are required.

Question 22: Do you use DevOps in Salesforce or have interest to opt for it in future?

Answer: No, not currently.

Question 23: Are you aware about Salesforce governor limits and how do you manage it? (If any)

Answer: Not applicable to our current usage.

Question 24: What are your expectations for the vendor to be onsite during this project?

Answer: We expect the proposal to identify what is appropriate based on work scope.

Question 25: How many hours per month do you expect you will need support from the vendor selected through this RFP?

Answer: 10-15 hours per month. The expectation is that a portion of those hours, when interacting with Corporation staff, will be during normal business hours (8:30 – 4:30 EST).

Question 26: The instructions ask vendors to “Include a timeline of major tasks and milestones”. Please elaborate on the scope of work to allow a more accurate timeline estimation. Please provide details regarding activities and expectations related to “upgrade to the Lightning Platform.” Please also describe in detail the anticipated “customization related to the Corporation’s new programs and services and/or business process Improvements”.

Answer: Please refer to the RFP Scope of Work for general expectations of support. No new programs & services are currently planned.

Question 27: In regards to the upgrade to the Lightning Platform, has that process started, and if so, what work has been done so far for that process?

Answer: No, the process to migrate users to Lightning has not started. General testing is currently underway by the Administrator.

Question 28: Can the corporation confirm if they are entirely using Salesforce classic currently, and not Lightning in any environment (production/sandbox etc)?

Answer: Salesforce classic is primarily in use. Lightning is currently in use by 2 users.

Question 29: Does the Corporation have new programs and services ready to add to the Salesforce system, or is this just something you expect to need to do? If they are ready, can you give some details on those programs and services needed to be added?

Answer: No new programs & services are currently planned.

Question 30: Of the 30 internal users, how many are system administrators?

Answer: 1 system administrator

Question 31: Does the corporation subscribe to the train-the-trainer training model, or would the vendor be expected to train the entire user group?

Answer: We are open to either approach.

Question 32: Is the existing Salesforce environment documented in terms of customizations? Specifically, can the corporation furnish materials such as: user stories/requirements for the original implementation; technical diagrams/specs of the existing data model (entity relationship diagrams etc); process flow documentation if any?

Answer: This information is not currently available.

Question 33: What is the current license stack the corporation is using? (ie., Sales cloud/service cloud etc, as well as the tier of each license (enterprise/professional, etc.))

Answer: Sales & Service Cloud - Enterprise Edition

Question 34: Did the corporation use an implementation partner for the original implementation? If so, could you provide the name of that vendor?

Answer: Yes, Buan Consulting was the corporation's implementation partner.

Question 35: Is this system used only by Rhode Island commerce or is it also used by other state agencies and departments (ie workforce development, labor, dept business regulation, etc.)

Answer: The RI Commerce Corporation Salesforce subscription is used only by RI Commerce.

Question 36: What information is currently captured in the system?

Answer: Traditional CRM type data.

Question 37: Does the system include incentives, sites and buildings, etc.? If not currently, will it or can it in the future?

Answer: Not currently.

Question 38: Do you currently utilize any dashboards or reporting from the system? Does it integrate with any other reporting tools, ie Power BI, Tableau, etc.?

Answer: Yes, we currently use Salesforce reports and dashboards.

Question 39: Does the system currently integrate with any other external tools? If so, what integration tool is currently used?

Answer: D&B Optimizer

Question 40: Are you using Communities? Does anyone external interact with the system? Will they or can they in the future?

Answer: No, Communities are not currently in use.

Question 41: Does the agency have any need to have data migrated or loaded into the system from external sources? If so, please describe how the data is stored currently, as well as the amount and type of data.

Answer: No

Question 42: Will the agency consider an extension to the deadline? We respectfully request the agency extend the due date to two weeks after the date when the agency releases responses to vendor questions. This will allow all potential vendors to fully review answers and use the information to shape a proposal that will provide the most benefit to Rhode Island Commerce Corporation, its employees and constituents.

Answer: No, we are not able to offer an extension.

Question 43: Are there any restrictions on where support resources need to be located? (e.g. US Based, No restriction, etc)

Answer: Please refer to Item # 14 under Instructions and Notifications to Proposers in the RFP.

Question 44: For the scope of work, is there a current punch list of needs/backlog of tickets that can be shared?

Answer: No

Question 45: Is there an expectation for onsite training/support or can work be done remotely?

Answer: Please refer to Question #24.

Question 46: Would Rhode Island Commerce be open to purchasing a bucket of support hours that can be used throughout the year?

Answer: Yes, that may be a consideration.

Question 47: Are there any tasks RI Commerce Corporation would like to see including purposed timeline?

Answer: Please refer to the RFP

Question 48: Can you provide further information on #5 in the Technical Proposal Elements?

Answer: How does the respondent plan to track and monitor progress for each activity?

Question 49: What is your travel and expense policy?

Answer: The Corporation's Travel and Expense Policy is for staff members specifically. Consultant travel must be in line with budget submitted and approved by the Corporation and follow Guidance from all relevant federal and state statutes.

Question 50: Can you please confirm that the delivery process is correct and that it needs to be mailed with 5 copies and a USB stick?

Answer: Yes, it is correct.

***End of Addendum ***