

**TO: Prospective Supplier**

**FROM: Kip Smalligan, Sr. Strategic Sourcing Specialist, GVSU Procurement Services Ph: 616/331-3211 Fax: 616/331-3287 smalligk@gvsu.edu |**

**DATE: November 11, 2020**

 **RE: Request for Proposal #221-05
 Salesforce CRM Software Implementation**

The Michigan Small Business Development Center (SBDC) at Grand Valley State University is accepting proposals for implementation of Salesforce CRM software.

To bid for the supply and implementation of this software, submit your proposal by e-mail to smalligk@gvsu.edu. Write **RFP #221-05** in the subject line of your e-mail. Your proposal must be received no later than **5:00 p.m. Friday, December 11, 2020**. No telephone, fax, drop-off, or verbal quotations will be accepted. GVSU is not responsible for late, lost, misdirected, incomplete, or illegible proposals.

Direct all questions regarding this RFP to Kip Smalligan at 616/331-3211 or smalligk@gvsu.edu.

**Instructions:**

1. RFP Schedule:
November 11, 2020 RFP released
December 11, 2020 5:00 pm Proposal submission deadline
January 2021 Proposal awarded
August 2021 Project completed and invoiced
2. Should it become necessary to revise any part of the RFP, notice of the revision will be given in the form of an addendum to all prospective suppliers on record as having received the RFP. Any addendum notices will also be posted on the [Bid Opportunities page](https://www.gvsu.edu/purchasing/bid-opportunities.htm) of the GVSU Procurement Services website [www.gvsu.edu/purchasing](http://www.gvsu.edu/purchasing). Each supplier should acknowledge receipt of any addendum in their proposal on the Proposal form (see page 10), but the failure of a supplier to receive or acknowledge receipt of any addendum, shall not relieve the supplier of the responsibility for complying with the terms thereof.
3. It is GVSU’s preference to award this RFP to a single supplier. Grand Valley State University reserves the right to accept or reject any or all proposals.
4. Click on this link to see GVSU’s [General Conditions](https://www.gvsu.edu/purchasing/general-terms-conditions-218.htm)
5. Grand Valley State University is Michigan sales and use tax exempt. Exemption certificate will be provided to the awarded supplier.
6. Complete the proposal form on pages 10 and 11.
7. Acceptance of awarded proposal will be made by purchase order.
8. Direct all questions regarding this RFP to Kip Smalligan at 616/331-3211 or smalligk@gvsu.edu.

**Specifications:**

**Background**

The Michigan Small Business Development Center (SBDC) is a federally and state funded organization that provides no cost one-on-one consulting and business education training to support the success of small businesses. In 2019, Michigan SBDC provided consulting to 6,611 businesses and training to 7,060 individuals (in-person and virtual).

Michigan SBDC’s 100 to150 team members are hosted at ten autonomous institutions across the state, primarily colleges and universities. Each institution has an independent IT infrastructure and unique email domain. Statewide systems, such as the CRM, are managed by the “Lead Center” headquarters hosted at Grand Valley State University (GVSU).

Michigan SBDC is seeking a vendor to implement Salesforce as CRM solution. Michigan SBDC has been operating using [Center IC](https://www.centerdynamics.com/Documentmaster.aspx?doc=3) as a CRM for many years. This system is designed specifically for SBDCs and maintained by the system developer (Center Dynamics) to remain compliant with reporting requirements of a key stakeholder, the U.S. Small Business Administration (SBA). Center IC lacks the integration capacity and user-experience standards of a modern CRM system.

During summer of 2020, Michigan SBDC conducted an analysis with the support of a Salesforce partner to determine the following:

* Feasibility of Salesforce based on Michigan SBDC’s operational requirements
* Feasibility of upfront and on-going system costs
* Value of strategic benefits of moving to Salesforce

Based on this analysis, it was decided to move forward with Salesforce based on a target implementation start date of January, 2021.

In addition to replacement of Center IC as the CRM system, Michigan SBDC is working with Peopledesign, a user experience (UX) vendor, to conduct an alignment of digital platforms in order to provide an improved client journey. In January, 2021, the vendor will recommend an array of platforms to complement Salesforce as a CRM solution. These include:

* Redeveloped website
* Website chatbot
* Client facing Learning Management System (LMS)
* Client portal
* Marketing platforms, including e-mail marketing
* Client satisfaction collection

Peopledesign will lead the implementation and integration of these platforms in collaboration with the Salesforce implementation vendor.

Scope of purchase is contingent on approval of an anticipated SBA grant funding extension which will be known in March 2021.

**System and Implementation Requirements**
Below are system and implementation requirements. Please respond to the information requests and questions. Provide full answers including how your proposed solution meets the functional requirement and, where appropriate, how it can help streamline workflows, reduce duplication of effort, and improve the end-users experience.
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 **I.** **Vendor Information**

Provide a summary of the organization’s experience and qualifications.

How many staff would be involved in the implementation and migration of your proposed solution?

Provide resumes of the key team members that will be involved in the implementation. On Average, what percentage of each team member's time will be dedicated to this project compared to other projects or activities?

Will you utilize sub-contractors for the implementation and migration of this project?

Describe your organization’s experience in implementing Salesforce at other government or university settings.

Provide three customer references that you have worked with to implement Salesforce within the last three years. Include customer name, contact name, phone number, and email address for each reference.

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**II.** **Pricing**

Describe in detail the upfront implementation costs for your solution, including for Salesforce and add-on services. Specify areas of special pricing provided due to GVSU non-profit status.

Provide a comprehensive estimated annual cost for the next five years for Salesforce, add-on services, or follow-on work. What factors have gone into the estimated annual cost?

What is your proposed solution and pricing for Salesforce system licensing?

What are the on-going (post-implementation) resources required to maintain the solution? Include estimated human and financial resources, including for the following:

• Managed service or other third party support services

• Time and required skills of Michigan SBDC staffing.

Is the cost of post-implementation user support included in your proposal? If not, then what support options are available at what cost?

**III. System Use Cases**

This is a summary of common use cases for the CRM. This is not an exhaustive list. The implementation vendor is expected to analyze requirements to ensure that are usage needs are met by the solution.

1. Reporting Functions

User generation of custom reports that may be segmented or filtered by any combination of client data.

Realtime reporting dashboards that display key client data metrics or performance of SBDC staff and teams.

Automated generation of regular reporting data.

Pre-built system reports for regular or essential data needs.

Projection of “sales pipeline” of potential economic impact attribution based on client potential.

Measure change in client data over time, such as with updated employee count or sales revenue.

Quarterly submission of CRM client data to the federal Entrepreneurial Development Management Information System (EDMIS).

Integration and importation of data from other systems.

Quickly and easily query client records to create email lists.

Comparison of progress on economic impact metrics to targets, ideally including a forecast of future impact based on recent trends.

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1. Client Management by SBDC Consultants

Schedule and manage client interactions, including:

• Meetings, phone calls, and other client communications

• Client projects and action items

• Automatically import email interactions with client

Summary level view of client information including scheduled interactions and important client information.

User friendly guided data entry and data validation parameters that ensure proper collection of key data.

SBDC staff collaboration and communication related to clients within the system, such as when multiple consultants are working together with the same client.

Easy attachment and accessibility of external documents or information to the client record.

Management of consultants “client load”, including a summary and automated reminders of upcoming activities.

Speech to text functionality for inputting data in client records.

Manage email communications to clients, including ability to send custom emails to segmented groups of clients

Transparency of what forms/waivers have been completed by the client.

1. Integration & Extensibility

Integration of Tableau as a data visualization and data analysis tool.

Marketing solution functionality or integrations that provide the following:

• Automated email marketing platform integration

• Lead generation

• Life cycle marketing

• Message segmentation based on client type

Client portal that provides for the following:

* Hub for consultant interaction with clients, including assigning actions, tracking progress on activities, answering questions, and scheduling meetings.
* Timely information of upcoming events and courses
* Ability to report economic impact and client satisfaction

• Summary of training courses completed in the SBDC learning management system.

Integration of a client facing learning management system that hosts and monitors completion of SBDC on-demand training courses.

Schedule, manage, and/or collect payment for live virtual or in-person training events for new or existing clients. Event registration data must be integrated with the CRM and webinar/event service platforms.
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1. General Functionality

Highly intuitively and easy entry of data, including from mobile devices.

Publication of surveys to clients to collect client satisfaction or economic impact data.

Capture and manage all stakeholder relationships, including community partners, vendors, SBDC staff, and host institutions.

User training and support that includes self-serve and live channels.

Workflow management for internal SBDC processes related to client interaction such as the submission of market research requests.

Managerial transparency of a team’s data and scheduled activities (ex: previous or scheduled client interactions for an individual or for the full team).

**IV. Implementation Methodology**

A. General Implementation Practices

Describe your overall methodology and timeline for implementation of the solution.

How will system requirements be collected, analyzed, and managed?

What is your approach for considering and managing change requests that arise during the implementation? Are there decisions that are difficult to change at a later date?

How will your team manage interdependencies with other projects that fall outside your scope of work? For example, there may be concurrent or subsequent platform implementations being performed by another vendor for marketing and learning management systems that will integrate heavily with the CRM.

How will you address the organizational change management needs that arise from the implementation? Do you have anyone on your team dedicated to change management?

What documentation will be created throughout the implementation? Will this include a network diagram of MI SBDC business processes and data flow?

What MI SBDC support will be required during the implementation? Indicate the number of SBDC team members required to support the implementation, the expected time investment, and any skills required.

How will your solution address the ongoing maintenance of the system following implementation, such as system administration or other operational needs?

How will you address on-going data hygiene?

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What are your proposed solutions for reporting data to the U.S. Small Business Administration using [EDMIS](https://www.sba.gov/page/edmis)? What skills and time investment are required by Michigan SBDC or an outside vendor for this process?

What Salesforce “connectors”, “add-ons”, or “integrations” do you recommend as a part of your solution. Provide justification for why your recommended solution is preferable to competitor products.

B. Data Migration

What is the recommended or typical migration timeline for an organization such as Michigan SBDC? Include recommendations regarding the timing, order of work, and the number of stages. What amount of Michigan SBDC staff time do you estimate will be needed to support the migration?

The legacy CRM system should be available in read-only format for a period of at least 90 days following the implementation of Salesforce. How will you manage challenges arising from duplicate systems operating concurrently?

What migration services do you offer? Describe any data migration services, training, configuration, and policy planning you provide. Is all of this included in the price provided?

Are you able to address data cleanup issues during migration (duplicate accounts, etc.)?

What post migration services are included in the cost to support Michigan SBDC as it uses the proposed solution? What post migration services come at an additional cost?

C. User Support

Describe your proposed support solution, both for upfront implementation training and support as well as for on-going user support. Distinguish between support provided by the vendor and by Salesforce.

Describe your proposed support solutions for “Go Live” day and the post-launch period of 1 to 3 months.

Does Salesforce accept support requests from any Michigan SBDC staff member or only designated representatives?

What type of documentation is available to customers? How often is the documentation updated? Is any user authored content available that can be updated and customized to our SBDC implementation?

What is your proposed solution for how administration needs related to system customization will be documented and maintained following implementation?

What level of expertise is needed for all reporting, updating, importing and exporting functions? In particular, identify which functions require the intervention of a database administrator or Systems/IT personnel as opposed to functions that general staff can perform on their own?

**V. Data Security & Data Access**

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

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How does the proposed solution communicate with customers regarding expected maintenance or downtime for system updates?

Describe the data center(s) where the hosting is performed and any certifications or standards followed by the facility. Is data stored on redundant servers in multiple geographic locations?

When were the last penetration tests completed, how often are penetration tests performed, and how quickly red flags are addressed?

What is the uptime and support ticket resolution times for the proposed solution?

What is the uptime percentage of the proposed solution(s)?

How does your solution ensure information is kept secure while in transit?

How does your solution prevent data loss? What does the data recovery process look like?

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

Does Michigan SBDC retain ownership of the data stored at the data center? Will our data be stored in a proprietary format? Are we able to, at any time, acquire a snapshot of our full data?

How does the solution track changes to records? Are changes to all record types tracked? Is there any audit trail for edits? Is it possible to revert to a previous version of a record?

How has the solution been designed to comply with laws and regulations governing the storage and use of “protected” user data? Examples of such laws and regulations include: Family Educational Rights and Privacy Act (FERPA), Payment Card Industry Data Security Standards (PCI-DSS), and General Data Protection Regulation (GDPR).

**VI. Authentication, Permissions, and Identity Management**

Michigan SBDC staff are hosted at ten autonomous institutions, each with a separate email domain and IT infrastructure. What challenges does this present to your proposed solution and how will they be addressed? In particular, what are the effects for the cost and process of licensing Salesforce user accounts?

Does your solution allow for group based permissions? If so, are there any differences between what permissions can be managed for groups vs. individuals?

What is the level of granularity of access controls for staff functions (principle of least privilege)? E.g., can certain data elements be made read-only for some staff and read-write for others?

Some Michigan SBDC staff members and patrons might have multiple identities within the institution (e.g. a “consultant” and a “system administrator”). How would users with multiple identities be supported in the system, with respect to authentication, permissions assignment to their account, and permissions on their accounts?

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**Proposal Form: GVSU RFP #221-05 Salesforce CRM Software Implementation**

1. The undersigned certifies that to the best of his/her knowledge:

 There is no officer or employee of Grand Valley State University who has, or whose relative has a substantial interest in any contract award subsequent to this proposal.

 The names of any and all public officers or employees of Grand Valley State University who have, or whose relative has, a substantial interest in any contract award subsequent to this proposal are identified by name as part of this submittal.

 Name(s)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. The undersigned further certifies that their company \_\_\_\_ IS or \_\_\_\_IS NOT currently debarred, suspended or proposed for debarment by any federal entity. The undersigned agrees to notify the University of any change in this status, should one occur, until such time as an award has been made under this procurement action.
2. Supplier declares the following legal status in submitting this proposal:

 A partnership

 A corporation organized and existing under the laws of the State of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 An individual doing business as (DBA) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Supplier declares that company is at least 51% owned, controlled and actively managed by (check all that apply):

 African-American Native American Woman/Women

 Asian American Multi-Racial ADA Disabled Person(s)

 Hispanic American

1. Supplier acknowledges receipt of the following addenda:

 Addendum No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Addendum No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. BASE PROPOSAL SUM: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_dollars

 ($\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_) OR attach proposal.

1. The undersigned proposes to furnish all labor, materials, equipment, tools and services required to complete the work in accordance with the proposed Contract Documents listed herein, including all addenda issued pertaining to same, for the sum or sums as stated, and agrees that these Documents will constitute the Contract if accepted by Grand Valley State University.

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 Authorized Agent Signature Name & Title

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 Witness Signature Name

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 Tax Identification No. Date

VIII. ACCEPTANCE: This proposal is accepted by Grand Valley State University

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 Authorized Agent Signature Name & Title

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 Witness Signature Name

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 GVSU Tax Identification No. Date