NOTICE

RFP01-2303289B01-SALFOC-XXXXXX; Salesforce Analysis and Improvement Implementation Services
is hereby amended by the following change(s):

1.

Within the SOW, you mentioned integrations with other systems. can you help us understand what those include?
There are some systems that we would want to integrate with such as our VSA dashboard, ServiceNow, Data Warehouse, and Student Information System. We currently have data integrations between Salesforce and our Student Information System (custom-developed solution known as VSA) and our legacy Data Warehouse. Potential future integrations include Workday HCM and Financials, Service Now, and Microsoft Azure data warehouse.

2.

Phase 2 costs will depend on phase 1 finalized recommendations. So, the pricing that will be provided in during the proposal submission may undergo change later. is that fine?
We anticipate that there may be some variations based on the results of the analysis performed which may cause variations.

3.

Is a price range acceptable for phase 2 pricing? Or do you want one price?
FLVS is seeking one price.

4.

If certain functionality (scope) asked in the RFP is not clear/detailed, can we submit costing based on Time & Material?
See 6.1 B Phase II where FLVS is requesting the estimated fee and the accompanying description of the hours/resources it will require for that estimated fee in the space provided.

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5.

During the analysis during phase 1, will that require an in-person meeting at your premises? Or will be given remote access.
It may depend upon the proposal and the planning of the analysis. The approach remains TBD. FLVS will provide remote system access as needed. For the initial proposal, pricing should be based upon the assumption that there are no in-person/travel requirements. However, if FLVS determines that face-to-face meeting(s) is required at a later date, any additional costs incurred must adhere to the travel policy as specified on page 20 of the RFP.

6.

To what degree would you say the current system and processes are documented?
We have processes in place, however not formal SOPs. The existing documentation is less formal, so we are interested in finding efficiencies through this process.

7.

Can you throw some light on what kind of support will we get from your end during phase 1. like maybe a walkthrough of the current system
FLVS would provide a walkthrough during the kick off process.

8.

Generally, in such projects where there is a need for analysis followed by implementation, we will know the quantum of work involved (for implementation) only at the end of the analysis phase. In this scenario, can we propose fixed-price for Analysis and Time & Material for Implementation?
See question 4

9.

Is the analysis phase onsite or can be remote
See question 5.

10.

In phase 1 can we interview the actual business stakeholder/s or end user/s to better understand system and pain points on a regular basis?
FLVS will have a dedicated project team. The project team will incorporate the necessary stakeholders.

11.

Do references have to be from K-12 school districts?
They are preferred but not required.

12.

I think Phase I should be T&M and implementation can be fixed cost
We are not changing our costing structure.

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13.

How long since Salesforce is being used at FLVS?
Since 2007, initially for B2B but has been expanded to other areas of the organization. See "Background" paragraph of Section 5 - Scope of Services.

14.

Do you have a current vendor supporting the system?
We are currently self-supporting with FLVS Development team supplemented by Salesforce Support.

15.

All other systems you have listed for integration with salesforce, are they already with you or to be procured?
Yes, all the systems listed are currently integrated and licensed. However, we are open to recommendations to alternate application solutions.

16.

Question submission is Sep 13th. When can we expect a response?
Typically, within two to three business days as an approximation.

17.

Can you provide a tech stack or architecture diagram?
Will be provided during Phase 1.

18.

Can you describe in more detail how your invoice process works?
Standard payment terms are 45 days unless otherwise noted in the contract. All invoices should be emailed to 'accountspayable@flvs.net'.

19.

Could you please explain the mapping of integrations to the CRM both currently and in the desired future state? (Example: SIS, LMS, Workday, etc).
See question 1.

20.

Do you have an existing middleware for integration?
We utilize MS Azure Data Factory.

21.

What is the current product being used for your Data warehouse?
The legacy on-premise data warehouse is on Microsoft SQL Server 2016. FLVS is in the process of moving to Microsoft Azure Synapse.

22.

Is there a payment processer connected to SF and if so, what is it?
The only payment processing completed in Salesforce today is for instructional material purchases through a Salesforce customer community by our FlexPoint Education customers. We utilize an AppExchange app for this – Kinetic Growth, which was subsequently acquired by SAASteps.

23.

What other communication channels (SMS, phone, email, etc) are used as part of the Salesforce Platform for Students, Partners, and Parents?
FLVS uses Pardot for email marketing automation.

24.

What is your student application process that is done through Salesforce and is there an expectation that it should be included as part of the review?
FLVS utilizes Pardot for lead generation & nurturing of student/parent contacts, but the application & enrollment process is completed through our Student Information System. We do not expect this process to move into Salesforce.

25.

Is there a CTI system, and is there any integration?
FLVS does not integrate any CTI system with Salesforce.

26.

What are the expectations of reporting capabilities?
Reporting tool should have the ability to summarize, visualize and explore data at a high-level as well as drill-down detailed view and potentially the need to integrate multiple enterprise data sources. Preferably to include custom reporting capabilities.

27.

What are the expectations from the comment "work samples", as it pertains to Responding Questionnaire #1?
FLVS is looking for a list of projects similar to ours. A list with any relevant details will be sufficient for this.

28.

Pre-requisites: Can the vendor deliver this in onsite and offshore model? Can we have technical experts from offshore also work on the delivery of the project after winning?
No, onshore only, no offshore.

29.

General: Can we know top 5 challenges or key gaps from the existing Salesforce implementation?
Marketing and Sales alignment, Governance, Reporting, Workflows, and integrations with other applications.

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30.

Pricing: There are integrations interfaces listed. Is the vendor expected to provide a fixed costs of implementing this integration interfaces? Alternatively, can we provided expected monthly rates involved in delivering the integration services?
See 6.1 B Phase II where FLVS is requesting the estimated fee and the accompanying description of the hours/resources it will require for that estimated fee in the space provided.

31.

Technical:Does FLVS has any existing integration product that we can leverage to implement the proposed integration interfaces? Are we expected to propose an integration/API product for implementing the integration interfaces that are mentioned?
Microsoft Azure Data Factory is utilized for integration.

32.

Pre-requisites: Can the Proposer (prime vendor) partner with other sub-contractor to bid for this RFP?
FLVS will contract with one primary supplier, but that supplier may partner with whomever they choose to provide the requested services.

33.

Technical: Can we get some data on expected transactions volumes? How many users are expected to use this application? How many numbers of transactions are expected to process in an hour?
Current Users: Approximately 500 internal users and 1000 external customer community users. Current API usage is approximately 3% of allowable limit.

34.

Technical: On the integration interfaces, can we get an idea on average data size per interface that we need to handle?
Current API usage is approximately 3% of allowable limit.

35.

Technical: On the integration interfaces, can we get data on how many of these are real-time (Immediate request/response) and batch (Scheduled jobs)?
SIS integration is real-time. Legacy Data Warehouse integration is in batch with jobs scheduled daily.

36.

Technical: What is the volume of data (approx.) for ETL operations?
FLVS currently has a total Salesforce database size of approximately 17GB.

37.

Technical: What is the percentage split between internal users vs external users?
Approximately 500 internal users and 1000 external customer community users.

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38.

Technical: Do you have a dedicated knowledge base maintained in Salesforce for FAQs or any other documentation?
FLVS utilizes Salesforce Knowledge articles which are accessible by FlexPoint Education customers through a Salesforce community.

39.

Technical: Do you have any existing business process documentation (BRD, ERD, HLD, LLD, Flows)?
Process flows can be provided during Phase 1 of the project.

40.

Technical: Do you have a complete object schema for the CRM?
An object scheme can be provided during Phase 1 of the project.

41.

General: Do you have a list of Apex classes, related test classes and their coverages?
FLVS uses declarative development tools (e.g. Flow, Process Builder) whenever possible and maintains a relatively small amount of custom code. Percent of Apex Used: 6.63% Code Coverage: 95%

42.

General: In case of remote resources, do they need to be in specific time zone?
FLVS operates in Eastern Standard Time. Resources will need to be available during our standard operating hours.

43.

General: Can you provide details of Environmental setup (Sandboxes and connections)
We use Dev, Dev Pro, and Partial sandboxes only. We do not have a Full sandbox.

44.

Technical: What is the current deployment process and deployment tools currently in use?
We use developer sandboxes for development and testing. We deploy to production using either Salesforce change sets or Copado (free edition).

45.

Technical: What is the frequency of production deployments (Daily, Weekly, etc.)
We do not have a set cadence for deployment, but typically they do not occur more than a few times per month.

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46.

General: Do you already have any Salesforce service provider/Integration service provider onboard, if yes then the work under this RFP would be implemented in collaboration with them or will it be a separate implementation?
FLVS does not have a Salesforce service provider onboard. The system is maintained using internal resources.

47.

General: Do you have any external source from where you are importing data in Salesforce?
FLVS imports data into Salesforce through integration with our legacy Data Warehouse as well as direct integration with our SIS. We also utilize manual data imports using data loading tools, and we are open to improving these processes as part of this project.

48.

General: How many and what licenses of Salesforce do you already have?
Salesforce Enterprise Edition Salesforce CRM – 120 Salesforce Platform – 350 Customer Community – 1100 Pardot Advanced – 180k mailable contacts

49.

Technical: Any other Salesforce cloud is in use like Service, Marketing?
FLVS uses Pardot for marketing automation.

50.

Technical: What is the current degree of code optimization in salesforce? Are we well par under the Salesforce governor limits?
Percent of Apex Used: 6.63% Code Coverage: 95%

51.

General: Can we propose a time & material cost for analysis and submit a fixed price for the implementation phase at the end of analysis?
We require a Fixed price for the analysis. You may also submit an alternative pricing model in the space provided under section 6 of the RFP, but evaluations will be on the Fixed Price. For Phase 2 pricing please use the provided table to provide an estimate with an explanation of the resources and materials needed.

52.

General: For the analysis phase, can you provide an indicative availability of business team's time? 4 hr per day? 2 hr per day?
Will be determined during Phase 1 when the FLVS project team is established.

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