



REQUEST FOR PROPOSALS

SALESFORCE DEVELOPMENT AND INTEGRATION

PROPOSAL DUE DATE AND TIME

NOVEMBER 30, 2021 BY NOON (MOUNTAIN TIME)

**Wyoming Business Council
Ben Peterson, IT Manager
Email: wbc.rfp@wyo.gov
Phone: (307) 777-2846**

Table of Contents

- SECTION 1: KEY DATES..... 3**
 - 1. KEY DATES TABLE: 3
- SECTION 2: PROJECT INFORMATION..... 3**
 - 1. INTRODUCTION AND BACKGROUND: 3
 - 2. PURPOSE AND INTENT: 3
 - 3. STAKEHOLDERS:..... 4
- SECTION 3: PROPOSAL CONSIDERATIONS..... 4**
 - 1. SCOPE OF PROJECT: 4
 - 2. GENERAL REQUIREMENTS: 6
 - 3. SYSTEM OR WYOMING IT STANDARDS: 7
 - 4. TECHNOLOGY AND COMPLIANCE: 7
 - 5. HOSTING: **ERROR! BOOKMARK NOT DEFINED.**
 - 6. USER EXPERIENCE (UX): **ERROR! BOOKMARK NOT DEFINED.**
 - 7. PLATFORMS, DATA, & INTEGRATIONS: **ERROR! BOOKMARK NOT DEFINED.**
 - 8. TRAINING AND KNOWLEDGE TRANSFER PLAN 8
 - 9. MAINTENANCE AND SUPPORT REQUIREMENTS:..... **ERROR! BOOKMARK NOT DEFINED.**
 - 10. DELIVERABLES AND MILESTONES: 8
- SECTION 4: REQUIRED ELEMENTS OF PROPOSAL..... 8**
 - 1. PROOF OF INSURANCE 8
 - 2. PROPOSAL, FORMAT AND CONTENTS: 8
 - 3. ORAL PRESENTATIONS:..... 10
- SECTION 5: EVALUATION METHODOLOGY..... 11**
 - 1. OVERVIEW: 11
 - 2. COMPLIANCE WITH MANDATORY REQUIREMENTS: 11
 - 3. TECHNICAL SCORING AND RANKING: 12
- SECTION 6: PAYMENT TERMS 13**
 - 1. TIME SCHEDULE/INVOICING:..... 13

SECTION 1: KEY DATES

1. KEY DATES TABLE:

The following schedule of events is provided to set clear expectations for the project and is subject to change at the sole discretion of the Wyoming Business Council.

Event Description	Date/Time
RFP Released*	11/1/2021
Proposal Submission Due Date	11/30/2021
Finalist Oral Presentations	12/6/2021 through 12/20/2021
Tentative Contract Award Date	1/1/2022
Tentative Contract Negotiation Compete	1/15/2022
Tentative Work Begins Date	2/1/2022

* If questions arise while putting a proposal together, please email the contact on the cover page and we will answer questions in a timely fashion. Questions near the proposal submission due date may go unanswered and will not grant an extension.

SECTION 2: PROJECT INFORMATION

1. INTRODUCTION AND BACKGROUND:

The Wyoming Business Council (WBC) has identified the need for a Salesforce Developer to perform development and integration services for and within the WBC's Salesforce environment.

2. PURPOSE AND INTENT:

The purpose of this Request for Proposal (RFP) is to solicit competitive proposals from proposers who can offer Salesforce development and integration services to meet the Wyoming Business Council's needs and expectations, as described within this RFP.

The Successful Proposer will be required to provide a high level of quality services which are normally associated with the handling of a state government account of this scope and size.

3. STAKEHOLDERS:

Project stakeholders include the Wyoming Business Council Board and Staff, as well as the communities, businesses and public/private partnerships which rely on the Council's expertise, knowledge, and services.

SECTION 3: PROPOSAL CONSIDERATIONS

1. SCOPE OF PROJECT:

The Council desires an integrated solution to accomplish the work in this RFP. Proposers must bid on **all elements** listed to meet Council needs and expectations as described within this RFP. If partnering with multiple companies for an integrated solution, please identify the lead company and describe what work will be accomplished by each company.

The RFP scope of work must meet or exceed expectations of Stakeholders for user experience and intuitive functionality, security, data management, and reporting. These improvements would 1) address current trends in Customer Relationship Management (CRM), customer service, marketing automation, analytics and application development 2) integrate existing data, workflows and processes to improve usability, functionality and security 3) facilitate the automation of routine tasks and the integration with third-party software, services and/or data 4) address current industry, stakeholder and partner expectations for CRM capabilities and features, 5) create an intuitive user experience for Council's stakeholders and business partners.

The ideal Proposer will provide a cost-effective development and integration proposal which includes timeline(s) and key deliverables for accomplishing the work outlined in this RFP.

1.1. **PHASES OF PROJECT**

1.1.1. **Phase I – Discovery, Consultation and Prioritization:** This phase will consist of a comprehensive review of the Council’s existing Salesforce environment to evaluate extant data, modules and workflows and security measures. This phase will also include consultation with Council staff on how the various components are utilized internally and externally and identifying functionality/usability gaps, as well as identifying new functionality or integration needs. The discovery and consultation components will inform a prioritization report in which the Contractor shall make recommendations for adjustments or integrations to improve functionality, usability, and security.

1.1.2. **Phase II – Development, Integration and Deployment:** This phase will include development and integration of features, content, modules, and workflows as identified and prioritized under Phase I. The Contractor shall be responsible for collaborating with the Council to perform testing of all work performed and shall also include training for Council staff as requested.

1.1.3. **Phase III – Ad Hoc Support and Development:** This phase will consist of support, development and/or training services provided on an as-needed basis as identified and requested by the Council.

1.2. **GOALS OF PROJECT:**

1.2.1. The primary goal of this project is to evaluate the existing environment and configuration against actual usage and needs, and performing the necessary cleanup, development, and integration to address unmet needs; providing a solid foundation to build future applications.

1.2.2. The secondary goal is to provide the Council with as-needed development and support for ongoing maintenance and addressing future needs.

1.3. **ACCOUNT ADMINISTRATION AND MANAGEMENT OF PROJECT:**

1.3.1. There will be constant (at least weekly) contact between the Council and the Successful Proposer. While most of the contact will be by phone, email and virtual meetings, in-person meetings may be necessary and required throughout the project.

2. GENERAL REQUIREMENTS:

2.1. LOCATION & WORK ENVIRONMENT:

- 2.1.1. It is preferable, but not required, that the successful proposer be located in or near the state of Wyoming. Use of offshore and nearshore resources is strictly prohibited for all proposer services associated with this RFP.

2.2. COMMUNICATION REQUIREMENTS:

- 2.2.1. Proposer must provide a single point of contact for regular communication, reporting and account management for the Council's objectives, goals, and tools for all communications, including top-down, bottom-up, and cross-organizational communications. Status Reports, weekly status meetings and ad hoc communication as needed shall be required outlining the project's progress updates which include key issues, identified unknown risks, accomplishments, and compliance with milestones and delivery dates.

2.3. EQUIPMENT:

- 2.3.1. Proposer shall provide all electronic and telecommunications equipment needed to support the contract.

2.4. STATE PERSONNEL:

- 2.4.1. The following Council staff will interact with the Successful Proposer for this project. Other Council staff may be involved in the project from time to time to lend their expertise and perspective; however, these individuals will be the main points of contact from the Council for this project.
 - 2.4.1.1. Ben Peterson, IT Manager – ben.peterson@wyo.gov
 - 2.4.1.2. Bert Adam, Entrepreneurial Services Manager – bert.adam@wyo.gov

3. SYSTEM OR WYOMING IT STANDARDS:

3.1. STANDARDS DESCRIPTION:

The services, work products and final deliverables provided by the proposer shall comply with State Statutes, CIO Promulgated Rules, and State IT policies and standards for all components when completed and accepted by the Council.

3.1.1. State of Wyoming Electronic Transactions: <http://ets.wyo.gov/governance>

3.1.2. State of Wyoming IT Policies and Standards: <http://ets.wyo.gov/resources>

4. TECHNOLOGY AND COMPLIANCE:

4.1. TECHNOLOGY GOALS:

The goal of all activities performed under this RFP is to streamline the WBC's workflows/processes and record-keeping, achieve efficiencies with integrated datasets and external resources, and improve the overall usability of the Salesforce environment for the WBC's purposes.

4.2. SECURITY SPECIFICATIONS:

The proposer must provide security that provides administrative, physical, and technical means to protect sensitive or confidential information used in performing the responsibilities and duties set forth in this RFP. In addition, the proposer should address, but is not limited to the following list:

4.2.1. **Data Security:** Proposer shall maintain policy and procedures to maintain and support the security of confidential information. Provide a description of your policies, procedures and protocol on data security breach. Data breach notification procedures and plans are maintained and shall at a minimum, comply with WS § 40-12-502.

4.2.2. **Data Breach – Venue of Law:** If the proposer's proposed solution were to be selected, provide discussion on what state law would have jurisdiction in regard to data security breach notification.

4.2.3. **Certification and Audits:** Provide a discussion on certifications/audits, as applicable to this RFP, your company may have achieved (i.e. SAS 70 Audit, HIPAA, SOX, GLB, etc.).

4.2.4. Provide a copy of these certification/audits, including the dates these were conducted.

4.3. CONTENT INTEGRATION:

Proposers must demonstrate competency and familiarity with the development and deployment of Application Programming Interfaces (APIs) within the Salesforce environment.

4.4. SECURITY:

It is expected Successful Proposers will describe strategies your company would implement for permissions-based functionality and access across the platform.

5. TRAINING AND KNOWLEDGE TRANSFER PLAN

5.1. TRAINING REQUIREMENTS:

The following are the training requirements the Successful Proposer must accomplish, including a Knowledge Transfer Plan and exit strategy, and the development and execution of a training plan either on-site or via webinar etc. for the following groups and individuals:

5.1.1. Council System Administrators

5.1.2. Council General Users

6. DELIVERABLES AND MILESTONES:

6.1. EXPECTED DELIVERABLES:

The Council will review, evaluate, and accept the following deliverables.

6.1.1. Overall Project Plan – No proposer work will start without the Agency’s written approval of the Project Plan

6.1.2. Overall Project Timeline

6.1.3. Process for Phase I Deliverables

6.1.4. Prioritization Criteria

6.1.5. Process for Phase II Deliverables

6.1.6. Quality Assurance (QA) Test Plan

6.1.7. User Acceptance Plan

6.1.8. Deployment Plan

6.1.9. Training Plan

6.1.10. Process for management of Phase III deliverables

6.1.11. Weekly Status Updates and Fiscal Management Reporting

SECTION 4: REQUIRED ELEMENTS OF PROPOSAL

1. PROOF OF INSURANCE

1.1. INSURANCE REQUIREMENTS:

Proposers must include evidence of insurance meeting Council specifications as outlined in Attachment A “Sample Contract” under Sections 8(V) and 8(W). Proposers who fail to include evidence of required insurance coverage with their proposals may be summarily disqualified.

2. PROPOSAL, FORMAT AND CONTENTS:

2.1. PROPOSAL INFORMATION:

Proposals should be submitted in two major sections: The Technical Proposal and the Cost Proposal. The proposer is responsible for submitting a separate section, within the proposal, in response to the following items. Omission of this section or any item within this section may result in the proposal being disqualified. The proposer should, at a minimum, address the following points.

2.2. TECHNICAL PROPOSAL:

2.2.1. **Table of Contents:** The Table of Contents should include all items listed in this section.

WBC Salesforce Development and Integration: Page 8 of 14

- 2.2.2. **Executive Summary:** The Executive Summary will condense and highlight the contents of the technical proposal in such a way as to provide the State with a broad understanding of the proposer's qualifications and approach to meeting the requirements of the RFP.
- 2.2.3. **Proposer's Background and Experience:** Company overview – the proposer should include a company summary including company history, office location(s), company size, financial statements, and statement of technical areas of expertise. The proposer should be able to substantiate to the satisfaction of the Wyoming Business Council that the proposer has sufficient resources to complete the project successfully within the time requirements.
- 2.2.4. **References:** Corporate references are required from at least three (3) prior clients. Whenever possible, an alternative point of contact for each reference should be listed with phone number and email address. Each reference should depict relevant experience that can be brought to bear during the term of this RFP. In order to ensure current expertise, all work for client references provided should have been completed no more than three years prior to the date of this RFP.
- 2.2.4.1. References will be verified during the proposal evaluation by telephone calls made by members of the Evaluation Team, through e-mail or the U.S. Postal Service.
- 2.2.4.2. If contact with the referenced contact person or an alternative that has knowledge of the proposer is not made, after reasonable attempts during the designated evaluation period, the reference will be classified as unsatisfactory. All attempts to contact a referenced client will be documented, including the date and time of the attempt.
- 2.2.4.3. NOTE: The Wyoming Business Council reserves the right to contact other State of Wyoming agencies regarding engagements they may have had with the proposer's company in the past, in addition to the references provided in the proposal.
- 2.2.5. **Single Point of Contact:** The proposer should identify a single point of contact for all contract management activities. The proposer's Project Manager's name and resume should be submitted with the proposal. The successful proposer should not change the Project Manager without written State approval.
- 2.2.6. **Project Management Plan:** The proposal should contain a comprehensive and practical description of the proposer's plans for project management and control mechanisms, including staff organizational structure, contractors, progress reporting, major decision making, sign-off procedures, and internal control procedures. The proposer should also indicate flexibility in meeting changes in program requirements and coping with problems.
- 2.2.7. **Narratives:** The proposal must include three to five (3 to 5) relevant examples of similar work performed for an organization of similar size and scope to the WBC.

- 2.2.8. **Project Delays:** Proposer should also describe how project delays will be addressed should they occur. This should include assurances that sufficient resources and knowledgeable, experienced staff are available to resolve delays.
- 2.2.9. **Contract Required:** A sample contract is provided with this RFP as Attachment A. All proposers acknowledge general agreement with the provisions of the contract. In the event any proposer has exceptions to any provision outlined in Attachment A, they are responsible for noting the exception on their proposal and providing a description and proposed resolution.
- 2.2.10. **Staffing and Project Organization:** An Organization Chart should be included with all proposed personnel, including the supervisor level, functional responsibilities, key personnel, and other staff members who will be involved in the project.
- 2.3. **COST PROPOSAL:**
 - 2.3.1. The Cost Proposal shall be clear as to the hourly rates for the various services offered by the proposer which may be relevant under this RFP.
 - 2.3.2. The Proposal must clearly identify the rates being charged and under what circumstances.
 - 2.3.3. Cost differentials – if any – shall be clearly noted. Examples include after-hours or weekend/holiday support/development, volume commitment, etc.

3. ORAL PRESENTATIONS:

- 3.1. **PRESENTATION INFORMATION:**
 - 3.1.1. Proposers may be requested to make an oral presentation to clarify and/or demonstrate any particular points about their proposals or to discuss any changes to their technical proposals which might be advantageous to the Council. The Key Dates timetable (See Section 1: Key Dates) will indicate the period when oral presentations may be requested. If so requested, proposers will be provided with a one-week scheduling notification of the time scheduled for the presentation. The Evaluation Team members will address questions to the proposers pertaining to their ability to complete this project. The proposer is responsible for the payment of all costs involved in any oral presentations and shall not be reimbursed by the State for these costs. All oral representation will be considered a part of the proposal, unless specifically stated otherwise.
 - 3.1.2. See Section 5: Evaluation Methodology, for evaluation criteria. Such presentations are for the purpose of explaining or clarifying any significant elements of the proposal and/or displaying technical capabilities to assist the Evaluation Team in further evaluating the proposal. At the option of the State, presentations may be attended by others in addition to the Evaluation Team members.

SECTION 5: EVALUATION METHODOLOGY

1. OVERVIEW:

- 1.1. **Evaluation Committees:** The Council will conduct a comprehensive, fair, objective and impartial evaluation of proposals received in response to this Request For Proposals and will be the sole judge with respect to the evaluation of the written and oral proposals. The evaluation committee is made up of members representing the project subject expertise. The evaluation committee will review and score all proposals independently and consolidate the scores in order to determine award.
- 1.2. Each Proposer will be judged on each of the criteria described in this RFP and the Proposers who receive the highest scores on the written phase, maximum of six (6), will be considered finalists and will be asked to make an oral presentation to the Council Evaluation Team. These finalists will be judged on the oral presentation criteria following the presentation phase, and the Proposer with the highest aggregate score from the Council Evaluation Team will be the Successful Proposer and will proceed to contract negotiations.
- 1.3. The State of Wyoming reserves the right to accept an entire proposal, a partial proposal, a single component proposal or no proposal at all.

2. COMPLIANCE WITH MANDATORY REQUIREMENTS:

- 2.1. To be considered responsive, a submitted proposal should meet the minimum requirements defined in this RFP. The minimum requirements are intended to ensure that evaluation of the Technical Proposal can proceed, and that the Contractor agrees to perform all responsibilities within the RFP.

3. TECHNICAL SCORING AND RANKING:

- 3.1. **WRITTEN RESPONSE QUESTIONNAIRE:** Proposer must address each of the items listed below in the Written Responses. Each question should coincide in order.
- 3.1.1. **OVERALL EXPECTATIONS: 15 Points**
- 3.1.1.1. Proposers Experience working with Government and/or Economic Development Clients
 - 3.1.1.2. Proposer's Experience integrating APIs and external applications
 - 3.1.1.3. Proposer's Experiencing managing multiple projects with competing deadlines
- 3.1.2. **ADMINISTRATION & ACCOUNT MANAGEMENT: 10 Points**
- 3.1.2.1. Account Administration & Management of Project
 - 3.1.2.2. Project Timeline
 - 3.1.2.3. Communication Requirements
 - 3.1.2.4. Reporting and Dashboard
- 3.1.3. **DISCOVERY, CONSULTATION, PRIORITIZATION: 30 Points**
- 3.1.3.1. Methodology for discovery
 - 3.1.3.2. Methodology and philosophy for consultation
 - 3.1.3.3. Prioritization methodology
- 3.1.4. **DEVELOPMENT, INTEGRATION, DEPLOYMENT: 30 Points**
- 3.1.4.1. Samples of previous work, including timelines and costs
 - 3.1.4.2. Examples of custom and "off the shelf" integrations performed
 - 3.1.4.3. Description of QA, Training and Deployment processes
- 3.1.5. **COST: 15 Points**
- 3.1.5.1. Cost Analysis (Cost Proposal shall be under a separate cover): The cost must be presented as a fully-inclusive cost-per-hour with any differentials clearly noted and described. The quoted cost shall be inclusive of all personnel, overhead, travel, equipment usage, and other miscellaneous costs.
- 3.1.6. **TOTAL POSSIBLE POINTS FOR WRITTEN PROPOSAL: 100 points**
- 3.1.7. **PROOF OF WYOMING VENDOR.** Operating as a Wyoming company is not a requirement for Proposers responding to this RFP. Companies that qualify as Wyoming Residents will receive preference. Resident Proposers must verify residency according to Wyoming state statute W.S. 16-6-101, (a) (i), defines "resident" as a person, partnership, limited partnership, registered limited partnership, registered limited liability company or corporation certified as a resident by the Department of Employment prior to proposing on this RFP, subject to the following criteria and subject to W.S. 16-6-102. Wyoming statutes are available at <http://legisweb.state.wy.us>.
- 3.1.8. **VALUE ADDED.** It is the intent of the Council to focus efforts on building upon assets and functionality that currently exists. Preference will be given to proposers offering unique capabilities and added value which differentiates the Proposer from other proposals that the Council may receive.

- 3.2. **ORAL PRESENTATION:** The highest scoring Proposers in the written response evaluation will be asked to bring to life and build upon those written responses through an oral presentation. Proposers must introduce and explain how the client relationship will be developed with the Proposer's team and how that team will achieve the Council's mission and strategic goals.
- 3.2.1. **OVERALL VISION & FUNCTIONAL DEMONSTRATION: 40 Points**
- 3.2.1.1. Design, Workflows and User Experience
 - 3.2.1.2. Content/Application Integration
- 3.2.2. **CLIENT RELATIONSHIP DEVELOPMENT AND TEAM DYNAMICS: 30 Points**
- 3.2.2.1. Proposer must introduce the team assigned to the Council and their respective roles, expertise, and hierarchy within the Proposer's organization chart. Proposer must describe its expertise in developing client relationships and address onboarding with Council staff and other partners/stakeholders, discovery phase and training. Proposer must demonstrate its expertise in collaborating with multiple teams to achieve a common mission and strategic goals. Proposers must also demonstrate their ability to understand and address changing user expectations.
- 3.2.3. **VALUE ADDED: 25 Points**
- 3.2.3.1. It is the intent of the Council to focus efforts on building upon assets and functionality that currently exist. Proposers should present unique capabilities and added value that would differentiate the Proposer from other proposals that the Council may receive. Proposers should elaborate on ideas, innovations, trends, opportunities and functionality which would enhance or streamline Council's workflows.
- 3.2.4. **PROOF OF WYOMING VENDOR: 5 Points** (As referenced above)
- 3.2.5. **Oral Presentation Scoring Criteria:**
- 3.2.5.1. Overall Vision & Functional Demonstration: 40 points
 - 3.2.5.2. Client Relationship Development and Team Dynamics: 30 points
 - 3.2.5.3. Value Added: 25 points
 - 3.2.5.4. Proof of Wyoming Vendor: 5 points
 - 3.2.5.5. **TOTAL POSSIBLE POINTS FOR ORAL PROPOSAL: 100 points**

SECTION 6: PAYMENT TERMS

1. TIME SCHEDULE/INVOICING:

- 1.1. The Council will negotiate payment terms based upon a schedule to be determined by the Successful Proposer and the Council. Payments of invoices will be based upon the Successful Proposer successfully completing the deliverables within the stated deadlines, and upon the Council's written acceptance of the deliverables and/or services.
- 1.2. The Successful Proposer is required to submit monthly status reports with invoices outlining the

contract's progress and compliance with milestones and delivery dates. Each report will be verified by the Council's representative that each of the RFP and contract requirements have been met to date.