



Responses to Inquiries

RFP 23-07

Organizational Change Management Services

Revised 11/30/23 Question #34 – Responses are Due December 8, 2023

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Header	Question Text
1. Delivery- Delivery Mode	What is the desired delivery model? 100% onsite, 50% onsite, as needed, etc.?
	Does INPRS prefer in person/onsite training, hybrid, or remote training?
	Will the OCM team be required to be on-site? If so, what percentage of time will be required?
	Is the INPRS a remote, hybrid or in-person workforce? Are there any expectations of the OCM Contractor to be available in-person for leadership meetings or other key events? If so, please describe.
	Can INPRS please now share its on-site expectations for the awarded vendor (for OCM planning, training planning, OCM execution, and training execution)?
Answer	INPRS is a hybrid workforce, and as such would like to have the option of both in-person and remote training.
2. Delivery- Offshore	Though the State does not typically allow for offshore resources, due to INPRS having quasi-agency status, does INPRS allow for the use of offshore resources on this project? If so, for what tasks and activities?
Answer	INPRS does not intend these services to be performed offshore. It is understood that a multi-national entity may have basic support operations and functions that are around the world. This would not exclude them from being selected, but there would be restrictions on what services needed to be performed by domestic employees.
3. Initial Analysis- Assessment	(Change Assessment) On a 1-10 scale (1= LOW and 10= HIGH), how big of a change will this effort be to your organization? (i.e. high degree of process/system/culture change would be a 8-10).
	(Communication) On a scale of 1 - 10 (1 = LOW and 10 = HIGH) how well do you communicate across the business today? how well do you communicate externally to users today?

	(Communication) What suggestions do you have for improving communications to align better to your culture for the upcoming project?
	(Communication) How was the level of communication viewed by stakeholders on past projects?
	(Communication) What are communication mechanisms are currently in place? What works? What is most effective? What doesn't work?
	(Culture) On a 1 to 10 scale, how would you rate the current corporate culture, with 1= obstacle to achieving results, 10=enables/drives results?
	(Strategy and Business Case) On a 1-10 scale (1= LOW and 10= HIGH), what is the probability that the impacted stakeholders will buy in to this project? Please include an internal and external POV.
	(Training) On a 1-10 scale (1= LOW And 10= HIGH), what is your level of confidence around developing end user training material? Please explain answer.
	(Training) On a 1-10 scale (1= LOW And 10= HIGH), what is your level of confidence around delivering end user training? Please explain.
Answer	The planned change initiative will impact the entire organization to some degree as we intend to update processes and the tools utilized in executing our work. Communication and training strategies will be developed in partnership with the selected vendor to address change adoption at the individual, departmental, and enterprise level.
4. Initial Analysis- Completed Items	(Section 3.1 INPRS Completed Tasks p.16) How many current staff are part of the Change Champion Team? Where within the organization do they reside?
	(Section 3.1 INPRS Completed Tasks p.16) Can INPRS make available completed PCT, 4Ps, and completed individual assessments of the impacted groups to finalize the project plan required by this RFP?
	(Section 3.1 INPRS Completed Tasks p.16) Is the vendor expected to reproduce or edit any of the completed tasks?

	Based on language in the RFP, it sounds like INPRS may have completed the Prosci Change Triangle Model. If so, how did INPRS score?
	Section 3.1 INPRS Completed Tasks: Referring to the Prosci assessment work already completed, is there a designated OCM team within INPRS that has completed this work or has INPRS collaborated with an outside OCM vendor to complete the work?
	Section 3.1 INPRS Completed Tasks: Who does the established Change Champion network consist of? (Size, roles, work conducted thus far, etc.)
	Section 3.1 INPRS Completed Tasks: Could we receive a complete list of the impacted groups?
	(OCM) On page 16 of the RFP under section 3.2 INPRS Completed tasks - who conducted the individual assessment of impacted groups and how was this completed? What were the results?
	(p. 16 – Section 3.1) Can you provide the details of your Change Champion Team, the PCT, the 4 P’s, and your individual assessment of the impacted groups?
Answer	INPRS current Change Champion Team consists of a cross functional group of 9 individuals. As a team we have completed the PCT and 4 P’s and will continue to update the PCT throughout the duration of the project to track progress and ensure there are not any gaps that need addressed. We would anticipate providing the chosen vendor the work that has been completed to date and look for them to review and build upon the work of the Change Champion Team.
5. Initial Analysis-Historical	(Lessons Learned) What are the lessons learned from past projects unique to INPRS, if any, regarding OCM, Communications & End User Training?
	(Lessons Learned) How has OCM been historically received at INPRS? Have past OCM experiences negatively impacted people's attitudes toward change?

Answer	<p>Given the scope and scale of the CRM implementation, INPRS believes that a structured OCM approach will prove beneficial in supporting staff members through the change initiative. As proven successful in past engagements, communication to ensure a proper understanding of the change, personal impact resulting from the change, and training support required to perform operational duties as a result of the change are imperative.</p> <p>INPRS has historically supported OCM through the project management process; however, the Prosci methodology is relatively new at INPRS. We have also created an organizational training department to assist with OCM and training efforts.</p>
6. Initial Analysis- Prosci	(OCM) Prosci is referenced on page 16 of the RFP under section 3.2 INPRS Completed tasks- how was this determined?
Answer	Prosci is the methodology INPRS has chosen to use for their OCM efforts. Several individuals within the INPRS team have become Certified Change Practitioners through Prosci.
7. Resourcing- INPRS OCM	(General) How do you currently support organizational change on other INPRS initiatives?
	(OCM) Is there an existing OCM structure in place today at INPRS? Does INPRS already use Prosci throughout the organization or is it just being referenced for this project?
Answer	INPRS has historically supported OCM through the project management process; however, the Prosci methodology is relatively new at INPRS. We have also created an organizational training department to assist with OCM and training efforts.
8. Resourcing- INPRS Staffing	As stakeholder buy-in is critical for success (vendor and State), is INPRS aware of the need to dedicate team member time to the CRM initiative and supporting OCM initiative as these project needs could impact other daily tasks for INPRS employees?
	Does INPRS know the number of INPRS staff and % of time that will be allocated to the CRM and OCM initiatives?

	Based on language in the RFP, it sounds as though INPRS has an internal OCM office. Is this the case and if so, what is the planned role for the internal OCM office on the engagement?
	Does the INPRS have any OCM resources and Training resources on staff to support this transformation?
	What State of IN business resources will be assigned to the OCM portion of the project?
	(Resources) Do you have an existing OCM, Communications or End User Training (EUT) / L&D team internally today? Will the INPRS senior management team be committed to dedicating adequate OCM, Communications, end user training resources to support the project in partnership with our firm? If so, given some of the INPRS OCM completed tasks mentioned in the RFP, will we have dedicated resources from INPRS to work with throughout each phase? Please provide any insight on INPRS OCM resource plans at this time (if any).
	(p. 12 – Section 2.4) Do you have an internal training department that we will be working with? How integrated will they be with the deliverables if so?
Answer	INPRS currently has a Change Champion Team for the CRM project that consists of 9 cross-functional staff members. In addition to this team, INPRS has recently created an organization training department.
9. Resourcing- Technical	(System Implementation) Does the INPRS intend to have an internal Salesforce administrator?
Answer	Yes
10. Resourcing- Vendor Role	(Communications and Engagement) Would you anticipate the selected partner to co-lead the champion network?
	Will there be a steering committee and governance structure in place where the OCM team can participate?

Answer	INPRS currently has a governance structure that will continue to be utilized for the duration of this project. We anticipate that the current Change Champion Team will stay engaged.
11. Training and Execution-Delivery	Does INPRS have any specific preferences for types of training delivery?
	Is there an assumption that some training would be self-paced or all training would be in-person?
	If in-person, will INPRS provide the facilities (training room, laptops, etc.)?
	(Training) What is the most effective way people learn at INPRS? Instructor Led Training (ILT), Virtual Instructor Led Training (VILT), Web Based Training (WBT) / eLearning, etc.? Are there expectations for how these are delivered internally?
	(Training) Is training delivery a part of the scope? If so, what part? If so, what are your current methods for delivering training?
Answer	INPRS expects to develop and execute a training strategy in partnership with the chosen vendor.
12. Training and Execution-Environments	(Section 2.4 Training Execution p.12) Is INPRS requiring the Salesforce solution vendor to provide a training environment for hands-on training exercises?
	(Training) Will the CRM vendor maintain a training environment and load training data for real life scenarios and hands-on practice?
Answer	TBD.

<p>13. Training and Execution- History</p>	<p>(Training) What are some issues INPRS has had with end user training on projects in the past? If any...</p>
<p>Answer</p>	<p>The goal of the OCM engagement is to ensure regular communications, early adoption, and the execution of relevant and timely training for INPRS staff members.</p>
<p>14. Training and Execution- Ongoing</p>	<p>(Training) Describe your current governance and process around keeping training up to date. Do you expect your vendor to own the content moving forward after the initial build through each phase and even beyond Phase 3? Or at some point with INPRS own sustainment of training content? Please explain.</p>
<p>Answer</p>	<p>INPRS will own the sustainment of the training documentation.</p>
<p>15. Training and Execution- Repository</p>	<p>What is meant by this statement: “This repository, and the accompanying training documentation, must include an agreed-upon standardization of processes divided by each INPRS business unit.”?</p>
	<p>The need for training repositories is outlined several times in the RFP. Is there a current intranet site (SharePoint site, etc.) that houses existing repositories, or would that need to be</p>
<p>Answer</p>	<p>TBD.</p>
<p>16. Training and Execution- Salesforce Provided Training</p>	<p>To what extent will training and training execution be provided by Salesforce as part of the Salesforce CRM purchase?</p>

Answer	Salesforce or the CRM Vendor will provide general training on how to use the Salesforce product. The OCM Vendor will provide training on how to use the system to support the INPRS business processes. These processes will be modified as part of the CRM/Workflow design.
17. Training and Execution-Services	If a vendor can provide OCM support services that include planning and materials support for training, but not training subject matter expertise or training session execution, will this be considered for this RFP?
Answer	Training execution support is a desired component of this RFP.
18. Training and Execution-Tech/Process Split	Is the Salesforce CRM vendor responsible and accountable for all technical training for INPRS staff that includes content development and training execution, but managed, organized, and facilitated by the selected OCM vendor?
	Is the selected OCM vendor responsible and accountable for all process training for INPRS staff that includes content development, training execution, training management, training organization, and training facilitation by the OCM vendor?
	(Training) Appendix D: Technical Response. Item 6 Knowledge Transfer and 7 Building Ability: Is the training requested for OCM or on the system?
	(System Implementation) Does training fall under the OCM umbrella or the Salesforce Implementation efforts? Will there be overlap?
	Will the system integrator (SI) have any role/responsibility in regard to providing training materials and/or conducting training of the Salesforce solution, and if so can INPRS please now explain their role/responsibilities? If not, can INPRS please explain the rationale for not having the SI involved with training efforts?
Answer	The CRM System implementor and the OCM Vendor will collaborate to develop and execute the enterprise training strategy.

19. CRM Project-Data Cleanup	(System Implementation) What is the INPRS plan as far as Salesforce Data Clean Up? Is this a separate effort?
Answer	Yes, it is a separate effort.
20. CRM Project-Overview	Why are you moving to Salesforce ServiceCloud CRM and what are the underlying business goals of this transformation?
	What are names of the INPRS business units?
	Could more information be provided around the internal structure of INPRS and specifically around collaboration partners for the activities of this scope?
	(Leadership and Stakeholder Commitment) Does INPRS feel like you will have adequate executive sponsorship involved to sell the vision and help drive change through the organization?
	(Project Background and Expectations) What are the biggest risks you see in your organization embarking on this project? Where would the people related risk rank (low, medium, high)?
	(Strategy and Business Case) How does this project align with the mission statement/vision statement/core values of the organization?
	(System Implementation) Have there been other efforts to implement this same or similar project in the past and reasons it was not previously implemented?
	(OCM) Do you have a plan to have an operational excellence resource to revamp the business processes as part of the implementation RFP? Which RFP is this effort currently outlined in?
	(p. 11 – Section 2.3) Has Voya and other vendors that you work with submitted their plan for the work they require? If yes, please provide.
	(General) What are your areas of success measurement for this initiative as they relate to your roadmap and/or strategic plan?
	(OCM) Regarding the administered INPRS funds references on page 4 of the RFP, will each of these funds be addressed within the three phases outlined on Page 11 or what considerations will factor into their implementations?

<p>Answer</p>	<p>INPRS is adopting Salesforce ServiceCloud CRM to enhance operational efficiency and customer service, a first-of-its-kind initiative for our organization that supports our strategic objectives. The project, steered by our executive leadership, is aligned with our long-term organizational goals and core values, ensuring a transformative impact across the board. Information on our internal structure and collaboration partners will be shared with the selected vendor during contract negotiations, emphasizing the importance of informed and aligned collaboration. We are proactively addressing potential challenges, especially those related to adapting to new systems. An operational excellence resource will play a key role in managing these transitions. Overall, the Salesforce ServiceCloud CRM project represents a strategic alignment with our mission and vision, committing to a transparent and collaborative approach for successful implementation.</p>
<p>21. CRM Project-Vendor</p>	<p>Regarding Section 3.4 and the CRM Integration vendor, has that RFP been issued and has the Integration vendor been chosen? If so, can you share who the Integration vendor is?</p>
	<p>Section 3.4 Separate RFP for CRM and Workflow: Is the CRM Workflow Services vendor known? Or, when will this vendor be selected?</p>
	<p>(System Implementation) If known, who is the vendor who will be completing the Salesforce implementation work?</p>
	<p>(p. 5 – Section 1.5) What system integrator (SI) is working with you on the CRM integration? If contract is not yet awarded, please provide us with how dependencies will be mapped?</p>
<p>Answer</p>	<p>The RFP for the CRM integration vendor continues. Finalist have not yet been selected. CRM finalist presentations will occur in the third full week of December. Requirements and dependencies will be further defined during the planning phases of this and the CRM/workflow project.</p>

<p>22. Fee Schedule - Fee Schedule</p>	<p>(Appendix F p.49) The attached pricing sheet includes items not related to this RFP such as system costs and data conversion, can INPRS confirm the pricing sheet is correct?</p>
	<p>In Section 2.5 Pricing & Fees, there is a statement about “costs should be segmented to cover initial setup, licensing, customization...” and Section 2.8 Appendix F Fee Proposal looks like it is setup for Implementation services and not OCM/Training services. Can you provide a more accurate Appendix F showing how you would like OCM/Training services to be priced and split out?</p>
	<p>(Appendix F: Fee Proposal) In 2.5 Pricing & Fees: it states “Costs should be segmented to cover initial setup, licensing, customization, training, and support services.” Can you explain how these cost should be segmented within specific fields in Appendix F: Fee Proposal?</p>
	<p>(Appendix F: Fee Proposal) Seeing how this work would not include the actual CRM system implementation, what type of costs do you anticipate we put in the System Costs field?</p>
	<p>(Appendix F: Fee Proposal) What costs do you intend to see in the Services Costs field?</p>
	<p>(Appendix F: Fee Proposal) Would you like OCM specific tasks (like stakeholder register, change plan, change readiness assessment, etc.) in the Services Cost field and anything specific to training development and delivery in the Training Costs field?</p>
	<p>(Appendix F: Fee Proposal) May we provide detail of the draft of courses offered in the business proposal and keep the class offering in Training Cost Detail within the Fee Proposal more high-level (End User, Admin, etc.)?</p>
	<p>(Appendix F: Fee Proposal) Can you expand upon what costs you believe the OCM vendor would need to determine for Future Services Cost: Data Conversion, Modifications, and Integration Development?</p>
	<p>(Appendix F: Fee Proposal) May we provide the Fee Proposal in two parts: a completed Appendix F (Excel) and a Word document to provide narrative context and additional details?</p>

Answer	Appendix F is a generic fee schedule for these two related RFPs. All boxes were not intended to apply to each RFP. For this RFP, mostly the Services Costs Detail and Training Costs Detail will need to be completed. We are also correcting some formula totals that needed to point to the right cells. Attached is a revised version of the fee schedule.
23. Initial Analysis-Language	(Language) What are the language requirements for OCM, Communications and End User Training? Will translations be needed from English to any other language as part of this project? Is English the core language?
Answer	English is the core language.
24. Procurement-Budget	(General) What is the anticipated budget for the OCM/training vendor?
	(Budget) Does the agency have the supporting allocated budget for OCM that enables a robust approach to ensuring meaningful change management? What budget dollars are allocated for the project?
	Can INPRS please now share its estimated/capped budget for these services?
	Can INPRS please now share it's expected level of effort for these services (e.g., expected number of annual hours and/or FTEs)?
	Can INPRS please now share its budget for the Salesforce implementation project?
Answer	INPRS is positioned to adequately fund the Organizational Change Management process. Prepare your response with the level of training that you believe necessary and at a price that is appropriate.

25. Procurement- Contract Term	In section 4.1 Length of Contract, it states 3 years. Are you looking for Fees & Costs budget to be based on an initial 3-year contract or a 12-month contract?
	Have milestones been identified within the three-year period of Phase 1 that indicate possible variances in level of effort throughout this period?
	Section 4.1 Length of Contract: Is Phase 1 anticipated to take three (3) years to complete? (i.e., Feb 2024 to Feb 2027).
Answer	INPRS anticipates that this process will take approximately three years to complete various milestones, some that can be anticipated and others that will surface. It is also expected that the level of effort will vary over the contract period.
26. Procurement- Financials	Will INPRS accept an alternative form of Financial Stability?
Answer	Audited financial statements are preferred, but not the only way to establish financial stability. We will considered other forms of evidence if they are substantial, compelling, and verifiable to a degree that in INPRS's opinion they clearly establish stability.
27. Procurement- Multiple RFPs	(General) If a vendor submitted a bid for the CRM implementation RFP, are they precluded from bidding on the OCM RFP as a prime or subcontractor?
	If an applicant responded to the CRM/Workflow project are they precluded from responding to this OCM RFP?
	If awarded the CRM/Workflow RFP would it preclude us from being awarded the OCM RFP?
	Does submitting a response to the OCM RFP impact our probability of being awarded the CRM/Workflow RFP?

Answer	Vendors can respond to both RFPs and may be awarded a contract to perform one or both.
28. Procurement-Payments	(General) In 2.5 Pricing & Fees: it states “Milestones and or work product will be reviewed and compared to business requirements prior to release of payments.” Have the business requirements been written? Please provide them, if possible.
	(General) In 2.5 Pricing & Fees: it states “Vendors should be aware that no payments will be made by INPRS until all associated work has been approved as aligning with the agreed upon outputs and/or outcomes.” Will a is (DED) process be put into place or just a review of the requirements? Simply put, what is the approval process for work outputs, outcomes, invoicing, and payment?
Answer	Detailed milestones have not been prepared at this time but would be developed when more clarity is available. During the planning stages we will work with the vendor to define the milestones and processes.
29. Procurement-References	(General) Can subcontractor references be included as part of the four required references?
	If a company submitting for the bid does not have government references should they not apply? Looking to learn how much of a priority that is.
Answer	References from clients of the subcontractor will be acceptable. Government experience and references are very important to establish a verifiable record of success.

<p>30. Procurement-Response Format</p>	<p>Should the transmittal letter be a separate document? Or can we include it as the first page of our full proposal document? Please advise.</p>
	<p>Can you please provide clarification on Appendices C and D? The RFP says the Business Proposal (including Appendix C) should be completed along with the Technical Proposal (including Appendix D). Appendix C appears to relate more to implementation and hosting of software services, which is not part of this RFP, correct? While Appendix D does relate directly to OCM services. There is also a lot of overlap in questions between these two Appendices. Should we just focus on Appendix D which relates to OCM services?</p>
	<p>(p. 14 – Section 2.7) Rather than breaking up the components of Appendix C to fulfill the Business Proposal requirements, would INPRS rather we complete Appendix C in its entirety and include as an appendix item?</p>
	<p>(p. 14 – Section 2.7) If INPRS expects Appendix C to be completed and submitted, but also include relevant sections from Appendix C inside the Business Proposal, which sections do you expect to be included?</p>
	<p>Can you please provide Appendix C and Appendix D in a Word document for ease of completion?</p>
<p>Answer</p>	<p>The transmittal letter can be included as the first page of the full proposal document. Include Appendix C as its own document and simply reference it in the Business Proposal. Word versions of the RFP and Appendix C and D are in the Word version of the RFP located on the INPRS website.</p>
<p>31. Procurement-XBE</p>	<p>Is there any set aside requirement or option for WBE/MBE related to this RFP?</p>
	<p>(General) What are your specific requirements to ensure we are compliant with regard to Minority and Women’s Business Enterprises per Section 33, pg. 23 of the RFP?</p>

Answer	INPRS does not have a set aside for WBE/MBE participation and preference points are not applicable in this RFP.
32. RFP Clarification- Architecture Standards	Where can we find a copy of these requirements?
	Section 27 (of the proposed contract template provided) Information Technology Enterprise Architecture Requirements. Contractor shall comply with all applicable INPRS Information Technology standards, policies, and guidelines. INPRS may terminate this contract for default for any deviation from those standards, as they exist as of the effective date of this Agreement, if the contractor fails to cure the breach of this provision within a reasonable time.
Answer	There is a process and a non-disclosure agreement required to access these requirements. The procedure can be found at this link: https://www.in.gov/iot/iot-vendor-engagement/ Meeting these standards has not been a problem in contract negotiations in the past and is not expected to be a problem now.
33. RFP Clarification- Hosted Solution	In Appendix C for References, it states: At least two of the references should be a vendor hosted solution. Can you clarify what you mean by “vendor hosted.” Did you mean to say references for “OCM Project Experience” since OCM services are not project work that is a hosted solution?
	(General) Please provide additional clarity on this reference requirement: “At least two of the references should be a vendor hosted solution.” Do you mean of the 4 references we provide that 2 references need to be prior work we did on a vendor hosted solution or that we must be the vendor for a past project that implemented a hosted solution?
	(OCM Deliverables) In Appendix C, it states: “For both implementation and hosting of software explain your approach and methods for quality management. For hosting explain your approach for both the software and services.” Are you anticipating the software hosting to be specific to change management software or are there other types of software you are anticipating from this RFP?

	(References) The references statement says two references should be for a vendor hosted solution ("At least two of the references should be a vendor hosted solution."). Please verify Salesforce hosted and vendor managed, or agency self-managed solutions meet the criteria for references.
Answer	INPRS is searching for a vendor with experience in OCM in a Software as a Service solution, such as a Salesforce implementation not just a generalist OCM vendor. This is the reason for the reference to a hosted solution.
34. Schedule-Time Extension	(Overall) Would INPRS consider a three-week extension to the response due date? Given the scale of the RFP and our desire to present a robust and well-structured response, we appreciate your consideration.
	While we understand the urgency for the response timeline and respect any decision, due to the number of holidays in November (Election Day, Veterans Day, and Thanksgiving) would INPRS consider extending the response due date by one week to 12/4/2023?
	Section 1.21 Summary of Milestones: Respondent RFP submissions are due on the Monday following Thanksgiving (November 27 at 3pm). However, the answers to questions are not being posted until November 17. Is INPRS considering adjusting the milestone calendar to allow for a full five business days of response time?
Answer	Responses to inquiries will be posted November 29, 2023, and the proposal due date has been extended to December 8, 2023, at 3:00 PM EST.
35. Scope-Counts	(Section 2.3 Proposed Solution p.11) What are the expected number of end users and stakeholders for Phase 1 of the project?
	(Section 2.3 Proposed Solution p.11) What are the expected number of end users and stakeholders for Phase 2 of the project?
	(Section 2.3 Proposed Solution p.11) What are the expected number of end users and stakeholders for Phase 3 of the project?

	Can you share any preliminary counts for the number of people that will be affected by this change and how many end users may require training, approximately?
	(Training) Is there an estimate of the number of staff who will undergo training?
	(Organizational Landscape) Please provide the number of impacted users/stakeholders by location. Additionally, do you have a breakdown of end users by function/role across locations?
	(External Stakeholders) With each release, how many impacted stakeholders are external vs. internal?
	(System) Thank you for providing the process catalogue, in addition do you have detail around the number of transactions across all processes that will need to be trained on by module?
	Can INPRS provide the number of user counts by Groups/Roles as defined in the Salesforce Implementation RFP?
	What are the estimated user counts for members, employers, and INPRS Staff by Functionality and Phase in support of planning for training, change, and communication activities?
	(General) How many stakeholder groups, or departments, are in scope for this project? And how many stakeholders/end users are members of each of those?
	(OCM) How many employees does the INPRS have? How many people does the INPRS anticipate will need to be trained?
	Can INPRS please now provide an understanding of the number/magnitude of end users for the Salesforce system (to understand the scope of both OCM and training efforts)?
	(OCM) If known, approximately how many people will be impacted internally at INPRS as well as external users (employers/members) of the system?
Answer	<p>INPRS has approximately 250 internal staff members, centrally located in Indianapolis, IN (see provided organizational chart). Externally, we have approximately 1,300 Employers and 529,000 members.</p> <p>The CRM implementation will impact the entire agency. Please refer to the INPRS Organization Chart for additional details.</p>

36. Scope- Deployment Approach	Will the systems be “live” after each phase or implemented with a future “go live” date for all impacted users to then use?
Answer	Each phase will be implemented as it is ready for production. INPRS fully expects to deploy multiple releases in each phase, implementing in an incremental manner.
37. Scope- General	(OCM) What level of involvement will the winning vendor this OCM Salesforce RFP be responsible for in relation to the 3.4 CRM/Workflow implementation vendor/project?
Answer	The CRM/Workflow and OCM Vendors will be expected to work collaboratively to successfully deliver the CRM/Workflow Program.
38. Scope- OCM Deliverables	(OCM Deliverables) Is INPRS open to additional / optional deliverables recommended by the vendor to ensure project success?
Answer	Yes, please provide recommendations as part of the vendor proposal.
39. Scope- Other Activities	Are there other system implementations aside from Salesforce going in at the same time either as part of this effort or separate and what are they?
Answer	The MuleSoft API transition project and GoAnywhere Managed File Transfer project will occur during the same timing as this project.

40. Scope- Salesforce Components	(Section 2.3 Proposed Solution p.11) What Salesforce CRM components are part of the solution?
	Scope references “and potentially other Salesforce Cloud offerings.” Can INPRS better define “other potential Salesforce Cloud offerings” applicable to INPRS goals for this project?
	(p. 5 – Section 1.5) What other potential Salesforce Cloud offerings are you looking at? Have you thought about dependencies and integrations?
Answer	The CRM implementors will propose Salesforce components as part of their solution. At a minimum, it will include Service Cloud.
41. Scope- Telephony	What is the telephony solution and how does it impact the Salesforce implementation?
	(OCM) Phase 2 on page 11 of the RFP references integrate call center and “modernize telephony solution”- Is a new telephony solution being implemented as part of this effort also or a separate effort going in at the same time and will it have it’s own change management or need to be part of this effort with the call center members?
Answer	Although a final selection of telephony solution has not occurred, the State of Indiana has started rolling out Genesys. INPRS is strongly considering Genesys. The telephony rollout needs to be in place for CRM Phases II and III.
42. Scope- Templates	Will INPRS be providing templates for communication or is INPRS planning to leverage the OCM vendor templates (modified/developed by the vendor for this specific project)?
Answer	INPRS will leverage project specific templates provided by the vendor.

43. Scope- Training	(Section 2.4 Training Execution p.12) Is INPRS’s expectation that the selected vendor will be responsible for delivery of all end-user training?
Answer	INPRS and the chosen vendor will develop and execute the training strategy.
44. Scope- Vendor Role	(Section 2.3 Proposed Solution p.11) How does INPRS define execution assistance?
	(OCM Deliverables) Will the Salesforce CRM implementor provide process documentation that can be adapted to include the new Salesforce steps and workflows?
	(Approach) Do you anticipate an OCM model between our firm and INPRS to be more advisory, a partnership or you want our firm to take full ownership?
Answer	The role of the vendor in Phases 2 and 3 will be to assist in executing the plans developed for OCM during Phase 1. Documentation developed withing the CRM portion of the program will be available to the OCM provider as it is produced.
45. Timeline- OCM Activities	When does INPRS expect that OCM planning activities should occur for Phase 2 and Phase 3? It is expected that all planning activities for future activities would be completed at the conclusion of Phase 1?
Answer	TBD; the OCM timeline for Phases 2 and 3 are dependent upon the planning and execution of CRM for Phases 2 and 3.

46. Timeline- Overall Timeline	Are there expected Go-Live dates for each of the three implementation phases? Is there an established timeline for the project we should align our planned activities to?
	In Section 2.3 can you share an estimated timeline or schedule from your implementor (software functionality) for Phases 1, 2 and 3, something that shows what functionality maps to what phases across the 3 years would be helpful?
	(General) What is the tentative or anticipated timeline for implementation of the CRM?
	(General) What is the anticipated go-live date for the CRM system? How might our contract be affected or changed once a timeline is set for go-live?
	(General) Will all go live for the CRM happen at the same time or will there be a staggered rollout?
	(Approach) Being the core CRM project will be done by another vendor? Do you have a high level timeline for phase 1, 2 and 3? What are the start dates for each phase and planned go-live target dates?
	(General) What is the schedule for the award of the CRM and workflow project?
	(General) Does INPRS plan to have these projects launch at the same time? If not, what is the timeline for the CRM/Workflow project?
	(System Implementation) How long is it expected to take to implement all three phases of the project?
	Can INPRS please now provide an estimated timeline for the Salesforce implementation project?
Answer	There are no pre-defined timelines for the CRM project. It is expected that the phases will occur sequentially rather than in parallel. For planning purposes, Phase I should be between 9 and 12 months. Phases II and III should be between 6 and 9 months.
47. Timeline- Phases	(OCM) Regarding the Project Plan Approach and Implementation Plan (timeline), should vendors build our approach and timeline based on the assumption that the three phases happening concurrently or will they build upon each other?
	(OCM) Can the INPRS further explain the roadmap for future Salesforce CRM integrations to the key partners referenced in section 3.2 of the RFP? Where would this visioning/roadmapping take place within the 3 phases?

Answer	See answer #48
48. Timeline- Status	(System Implementation) What project plan/milestones/timelines have been identified and what work has already begun on this effort?
	(System Implementation) What is the current status of the project starting and the phased implementations?
	(OCM) Have any other OCM efforts, communications, impacted systems and business process analysis already started on this effort and if so, what do they involve?
Answer	The CRM system implementation project has not started. INPRS anticipates a start date in Feb or March 2024. No other OCM efforts have occurred at this time.
49. Tools- Assessment	(Training) Is INPRS open to online assessment tools to assess staff knowledge?
Answer	Yes
50. Tools- Communications	(Communications and Engagement) What are your common vehicles for delivering communications?
Answer	Departmental and All Staff Meetings, Email, Newsletters, and SharePoint.

51. Tools- General	(Training) Do you have any enterprise training material creation or digital adoption platform (DAP) tools internally (uPerform, Captivate, Walkme, Assima, Enable Now, Datango, Opus etc.)?
	(Training) Would you consider a proposal that includes recommending the use of a Salesforce in-app change management tool?
Answer	INPRS is open to proposals for training material creation tools and use of Salesforce in-app change management tool. Vendors should provide rationale on why the recommended tool would benefit the OCM effort.
52. Tools- LMS	Specific to training and training delivery, does INPRS have a Learning Management System (LMS) to house and deploy learning assets to the end users?
	(Training) Does INPRS have an LMS that will be used for this project? If yes, will INPRS provide the LMS administration for loading content and pulling report, or will we be provided access to do this?
	(Training) Do you have an Learning Management System (LMS)? If not, where do you manage your training courses today and do you need an LMS? If, yes, what LMS do you have?
Answer	TBD.
53. Tools- Prosci	(General) Do you anticipate the awardee to utilize your Prosci Proxima suite of tools or for the awardee to utilize their own instance of the suite?
Answer	TBD.
54. Tools- Repository	(Training) Does INPRS have a document storage solution for resource?
	(Training) Do you have an existing repository where you store resources and training documentation?
Answer	INPRS uses FileNet for document management and PolicyTech for Process and Procedure retention.