INPRS

INDIANA PUBLIC RETIREMENT SYSTEM

**Responses to
Inquiries RFP 23-
03
Salesforce CRM
Implementation**

164.   Can you clarify whether Phases 2 and 3 (Section 2.3 Proposed Solution of RFP) are optional extensions to the initial contract, and if so, under what conditions they may be triggered?

Answer: INPRS desires high level estimates of the cost of the next phases. Clearly there are many variables that will need to be decided, but directional forecast will help INPRS to make budgetary decisions. These estimates could be used as a starting point to negotiate extensions to the contract, taking into consideration that RFPs ~~are~~ may be planned to contract for those services. Those estimates will not be considering binding on the vendor, since the scope is at such an early development stage.

INPRS reserves the right to award contracts for Phases 2 or 3 to responders to this RFP or to other vendors. INPRS may ask for vendors responding to this RFP, to update their proposals relating to Phases 2 or 3 based upon future scopes for these phases which are not now fully defined. If INPRS finds suitable responsive proposals in the updated proposals or from other vendors for either of the subsequent phases, then at INPRS's option, additional RFPs for those phases may not be required.

Responses to Inquiries
RFP 23-03
Salesforce CRM Implementation

1. Is INPRS interested in using the Salesforce Public Sector Solutions license?

   Answer: INPRS is not currently planning on licensing the Public Section Solutions product.

2. Do you currently own any Salesforce license?

   Answer: No. An updated listing of software titles and quantities to be purchased is in the slide deck at the end of this document. Numbers in parentheses indicate the initial purchases, the larger number is the forecasted total license count. Licenses will be purchased via other channels and not part of the contract resulting from this RFP. If there are other licenses or products that you believe to be necessary to implement your solution, include the initial cost plus any lifecycle costs in your fee proposal.

3. What integration platform is planned?

   Answer: APIs will need to be written natively within MuleSoft or be gatewayed through MuleSoft integration. APIs will either be developed by INPRS or by another third-party under a separate contract.

4. Is the MuleSoft contract an existing contract?

   Answer: No, that is a planned purchase, which will also be acquired outside of the implementation contract.

5. You mentioned the customization formula you are using and only alluded to custom objects. Is that the only customization you are looking at and are things like, process builders, workflow rules part of the customization equation?

   Answer: Ideally, we are looking to reduce customization to make sure we can upgrade more easily. Highlight anything that you add in your solution that would affect upgradability. In other words, we will put a logistics tail on maintaining outside of simply upgrading from version to version and that is something we would like you to call out?

6. Do you expect or require having a business rules engine in your solution?

   Answer: We will be leaving that up to the vendors for you to bring us your best solutions?

7. The rules engine is only available with the Service Cloud Public Sector Solutions option. Doesn't that make for a better solution?

   Answer: Nothing in our discussions has indicated the need for the business rules engine for call center interactions (case management, knowledge management, escalations, etc.) but if you believe that is the best solution, then outline it in your proposal.

8. You mentioned the contacts platform Computer Telephony Integration. Is that an integration that is required?

   Answer: Not in the Phase One implementation phase. Currently, the telephony solution is 8x8, but that is something that we will need to look at. There is no call center integration in Phase One. But in future phases (member and employer portals), there would be a call center component. You should plan for it as part of a later solution.

9. Is it the intention for vendors to respond (proposal, scope and cost) to all phases or just Phase One at this time?

   Answer: This RFP is specifically for Phase One. We would like budgetary directional estimates for Phase Two and Three as they may be an optional extension to this contract.

10. Regarding data migration: There were a number of questions around the ability or the best way of migrating data. Is the plan to migrate from an existing system into Salesforce and integrate contact records?

    Answer: There will be some migration needed but not a major migration project. One of the things we see as maybe the most difficult, is the initial load of the data that currently resides in Voya's Salesforce instance. If our structure doesn't match theirs, there may be a need for an initial load. We need governance between the two to keep that synchronization. There is not a huge data component to this from a migration perspective, but it will be an important piece.

11. Will the winning vendor be provided the Voya data model?

    Answer: Yes.

12. There is an existing Master Data Management (MDM) strategy that could play into the data model portions, especially from Voya. Is this documented or could this be shared in any way as part of the appendix to this RFP?

    Answer: We do not share data back and forth between Voya today, there are some standalone systems that are used. We are going to be driving our data model based on the way Voya has things configured today and that is something you will have as part of Phase One. You will have access to that information so that you can build a full data model.

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INPRS has an independent effort for MDM, which goes across all INPRS's systems. We will share this with the successful bidder.

We are leaving it to the vendors to decide the level of integration that we need. Voya currently uses Salesforce and we will be looking for best strategies. We leave it up to you to determine the best way for us to keep two Salesforce instances in sync (Voya and INPRS), knowing that there is a contractual relationship with Voya.

We do not see any change in the Voya contract, at this time. In the event Voya would be replaced with a different record keeper, we would want to know how data is kept up to date.

13. Is the Voya Salesforce environment the only source environment to be pulling and migrating data? Are there other databases (such as excel spreadsheets) to consider for order of magnitude?

    Answer: The INPRS Employer Reporting and Maintenance (ERM) system will also be a source for pulling data. This will consist of Employer and Member master data.

14. In the Salesforce the bill of materials, the very last product is Ownbackup. What products are you looking to buy from Ownbackup?

    Answer: This is still something we are working on right now. We do intend to have an independent backup solution, but that design is not quite finished yet.

15. In the RFP, it stated that INPRS is planning on 100% administering Salesforce after the project. Is this for the term of the engagement only?

    Answer: Salesforce Administration is for the duration of the engagement. Yes, we would want to have the selected vendor maintaining that the Salesforce environment, but, ultimately, INPRS does not want to be in a long-term managed service contract.

    During implementation, we look for the vendor to work with our Organizational Change Management (OCM) vendor that we will be selecting in an independent RFP. During implementation, there would be a cut over transition period.

    The OCM vendor will be responsible for doing training, but we will be looking for suggestions and recommendations from the successful vendor to show us the best way to train and become independent.

16. Does INPRS and the Procurement team have a preferred format for an RFP response between either Word Doc or PowerPoint Deck?

    Answer: PDF is the prefer final format, but we provide a Word version for ease of completing a response which would then be converted to PDF.

17. Should the response include itemized pricing by phase or as a whole?

    Answer: This RFP is for Phase One, the implementation. Provide a firm price for that phase and forecast estimated pricing for Phases Two & Three.

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18. Is this a brand new standup or an optimization of existing technology?

Answer: This is a new installation of Salesforce.

19. What is working and not working in the current SFDC environment?

Answer: See the slide deck at the end of this document, in the section "Modernization for Transformative Change".

20. What is currently deployed as far as Salesforce licensing?

Answer: INPRS has not purchased any Salesforce license, see the slide deck for a schedule of projected purchase counts.

21. Has Salesforce validated that the processes outlined in the Process Catalog are standard Out-Of-the-Box functionality available in Salesforce?

Answer: No, that has not been validated.

22. What is INPRS's appetite for change?

Answer: INPRS understands that as a result of implementing a CRM system, some business processes may in fact change. INPRS is interested in changes that streamline our operations, provide better visibility to the status of work in-progress, and provide an improved experience to our members, employers, and staff. The fact that INPRS is utilizing an Organizational Change Management vendor points to our understanding of the level of change anticipated.

23. Do you have dedicated resources to support the project from a PM/decision making standpoint?

Answer: Yes, INPRS has dedicated IT and business project managers. The vendor proposal should outline the roles expected to be performed by INPRS staff.

24. How do you manage reporting data?

Answer: INPRS utilizes an enterprise data warehouse where data is sent on a daily basis for reporting. We anticipate the selected vendor to use a combination of dashboards, queries, SLA management and transaction level reporting within Salesforce. Enterprise level analytics will be performed in the INPRS data warehouse.

25. Regarding your Master Data Management (MDM) strategy, where is data stored today, and what data challenges do you have? (confidence in data, quality, etc.)

Answer: INPRS is early within its MDM strategy. There is a lack of confidence in data. It is unclear the extent of data quality issues. The next steps are to catalog and profile the data to understand the scope of data quality issues. A Data Governance team will decide on future activities to mature our MDM strategy.

26. What is the timeline for implementing an enterprise data catalog solution?

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Answer: INPRS will likely implement a data catalog solution in the coming calendar year 2024.

27. What systems do you want integrated to Sales/Service Cloud?

    Answer: The Employer Reporting and Maintenance (ERM) system for employer and member master data and the Voya Salesforce system for case data.

28. Do you have a process you use to manage cases today, or is this a net new process/config?

    Answer: Employer call center cases are managed within the 8X8 telephony solution. Member call center cases are managed on the Voya Salesforce solution.

29. Regarding the expectation with 1% customization, how should the chosen vendor address situations that would benefit the project however would deviate from a 1% maximum customization?

    Answer: Each customization request will be reviewed by INPRS to strike the right balance between project benefits and ease of Salesforce system upgrades.

30. How many systems total will be integrated with INPRS, are there more than 3 as indicated in the RFP?

    Answer: See question #27.

31. What telecom / call center solution will be integrated?

    Answer: See question #8.

32. Are there specific INPRS training policies and standards available that can be utilized to ensure training materials comply with INPRS guidelines?

    Answer: There is not a training policy in place; there are training outline(s), modules, and skills assessments to aid in training development.

33. Are there specific INPRS technical writing policies and standards by which documentation needs to adhere to or is the vendor expected to provide?

    Answer: There are no specific technical writing standards for adherence.

34. Are there interdependencies between this effort and any other current or planned workstreams / projects?

    Answer: There is an ongoing project effort to migrate existing APIs to MuleSoft. Every effort will be made to minimize interdependencies between these project efforts.

35. Are there specific regulatory, compliance, audit requirements aligned to any of the processes in scope? If yes, what are the processes and associated requirements.

    Answer: There are no regulatory, compliance or audit requirements.

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36. Are there specific milestone dates that need to be met during the implementation?

   Answer: There are no specific milestone dates to be met.

37. Will the vendor team supporting this initiative be a standalone group, or will the team be part of a blended team consisting of both INPRS employees and other vendors?

   Answer: The vendor selected will be part of a blended team consisting of INPRS employees, and the Organizational Change Management (OCM) vendor.

38. Will the team operate as a discreet workstream or will the team roll up under a larger program (e.g., PMO)?

   Answer: The team will operate as a discreet workstream. The primary dependencies will be Mulesoft integration and Voya integration.

39. Are there specific existing Agile project methodologies, standards and procedures that will need to be adhered to or is the vendor expected to bring their own?

   Answer: The vendor is expected to bring their own methodology. INPRS has experience with traditional waterfall and agile project approaches.

40. What project accelerator tools are currently used for agile project management (i.e., MS Project for Web, Jira, SharePoint, Teams, other) or is the vendor expected to bring their own tools?

   Answer: INPRS has Jira, SharePoint and Microsoft Teams available for use on this project.

41. How many INPRS employees will be assigned to this project?

   Answer: The number of employees assigned to the project will be based on need. The following roles will be available: business analyst, project manager, and interface developer to INPRS systems, quality assurance testers, and business Subject Matter Experts (SMEs).

42. Will INPRS employees be 100% allocated or splitting time and also responsible for maintaining their daily work in addition to this project?

   Answer: INPRS employees assigned to the project will likely have other responsibilities besides working on this project.

43. What are the primary work locations (i.e., on-site, remote or hybrid)?

   Answer: INPRS employees maintains a hybrid work schedule where three days per week are on-site and two days are remote.

44. What INPRS organization is serving as the overall project sponsor for this initiative?

Answer: This initiative is being co-sponsored by the Benefits and Communications Departments.

45. Is there a single INPRS champion for this initiative to promote success?

Answer: The Chief Benefits Officer and the Chief Communications Officer will Co-Champion this initiative.

46. What level of detailed process maps are available (e.g., Level 1, Level 2, Level 3, etc.)?

Answer: The level of detail captured for our processes vary: some processes have process maps, some do not, the level of detail also varies. Some processes also have detailed process flows.

47. For the process sizing, please clarify the specific attributes that define Large, Medium, and Small?

Answer: Large: 3+ departments/vendors and member/employer (example: the retirement process). Medium: 2 departments/vendors and member/employer (example: Service purchase). Small: 1 department and member/employer (example: reporting a death).

48. Please describe the quality assurance framework that will be adhered to (e.g., number and type of environments, progression from dev through operational readiness testing)?

Answer: INPRS typically uses 4 environments. These include: Development, System Integration Test (SIT), User Acceptance Test (UAT), and Production. IT Quality Assurance testing is performed in SIT. Business readiness testing is performed in UAT by INPRS business Subject Matter Experts.

49. What quality assurance tools are used by INPRS to manage the test strategy (i.e., test cases, scripts, defect tracking, reporting, etc.)?

Answer: The IT Quality Assurance team at INPRS uses test cases, test scripts, and defect tracking and reporting. Automated testing is employed once code reaches a level of stability.

50. We downloaded all files from RFP NUMBER 23-03, but there are two additional attachment documents (page 40, 41) in the main document, that we can't find on the website.
    - Attachment A: Scope of Services
    - Attachment B Fees
How can we have access to these two files?

Answer: Attachments A and B are part of the Sample Contract for Services that is included as Appendix A.2 in the RFP. The two attachments will be drafted during contract negotiations.

51. (General) What version of Salesforce is currently in place?

Answer: None. This is a new Salesforce deployment.

52. (General) Where are the users geographically located?

Answer: Most users will be located within the state of Indiana.

53. (General) What languages and currencies are within scope?

    Answer: The English language and the US Dollars for currency.

54. (General) How frequently are exchange rates updated, and do we need to integrate Salesforce with a third-party exchange rate provider?

    Answer: Exchange rate uploads are probably not needed.

55. (General) While we will propose proper "phases" for the project, are there any key competing initiatives or critical dates that we should be aware of?

    Answer: See question #36.

56. (General) What is INPRS's requested approach for Application Administration Training?

    Answer: INPRS will need training on the specific configurations made for the project.

57. (General) What is INPRS's requested approach for End User Training? Should it be "Train the Trainer" or should the vendor lead all aspects, including the creation of formal training materials based on job functions, roles, and responsibilities, and standard operating procedures?

    Answer: The selected vendor is expected to work with and train the OCM vendor staff responsible for end user training. Additionally, the selected vendor is expected to train IT staff responsible for ongoing support of the Salesforce system.

58. (General) Is there a diagram available for the existing architecture, indicating where Salesforce will fit within the existing structure, and what are the existing Salesforce Orgs?

    Answer: A diagram will be provided to vendors that submit an "Intent to Bid" to INPRS.

59. (Sales Cloud) Can INPRS elaborate on the statement, "The Solution shall be a purely Service Cloud-focused implementation, with Sales Cloud implementation services offered as an optional additional expansion"? Can INPRS explain if there are any enhancements needed for the existing Sales Cloud implementation?

    Answer: INPRS does not perform traditional Sales like a commercial organization. We do however, staff fewer than 10 employees that serve a region within the state of Indiana. These individuals conduct retirement workshops and may meet with members and employers within their region. Each vendor is encouraged to utilize Service or Sales territories as appropriate in their proposed solution.

60. (Sales Cloud) What is the use case for having Leads exist for current Accounts?

    Answer: Leads are not expected to be needed as INPRS does not perform traditional Sales like a commercial organization.

61. (Sales Cloud) What are the criteria for identifying duplicate Leads?

    Answer: See answer #60.

62. (Sales Cloud) What causes Leads to auto-convert?

Answer: See answer #60.

63. (Sales Cloud) How are Leads routed today?

Answer: See answer #60.

64. (Sales Cloud) What custom objects are used in the Site User solution, and are they all generated at once?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

65. (Sales Cloud) How is a license that has been provisioned to a customer reflected in Salesforce?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

66. (Sales Cloud) Describe how Board Affiliations are enabled across Accounts.

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

67. (Sales Cloud) Please explain the "Parts and Provisioning" Object.

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

68. (Sales Cloud) How is INPRS conducting Account Planning today?

Answer: Currently, INPRS accesses multiple systems and tools to plan for member counseling and workshops.

69. (Sales Cloud) What tools are INPRS using for Account Planning?

Answer: INPRS currently uses benefit estimators, notes with internal systems and Salesforce notes with our recordkeeper, along with using internal systems to review service credit for eligibility.

70. Sales Cloud) How does INPRS determine the eligibility for Commercial Support Resources to be used on a deal?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

71. (Sales Cloud) What is the request process for Commercial Support Resources today?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

72. (Sales Cloud) What are the record types for the Opportunity Object currently in use? For each record type, what is the Sales Process and Stages for that record type?

Answer: See question #59.

73. (Sales Cloud) Elaborate on "To increase effectiveness regarding communication with members and employers, the system will need to be configured to support campaign management, email communication, and customer segmentation and analytics." Is there a need to engage with the customers via marketing emails? Is there a Marketing automation tool in place? We didn't see any marketing Cloud or Pardot license within the list.

Answer: INPRS currently uses Constant Contact for email communications with our members. If vendors feel additional licenses are needed to meet the RFP requirements please suggest them.

74. (Sales Cloud) Is there a plan to use dynamic dashboards (Einstein/CRM Analytics) in Salesforce, or do we stick to out of the box reporting?

Answer: Vendors should propose a robust reporting solution. If additional licenses are required, vendor should specify those licenses and the benefits of proposed solution.

75. (Service Cloud *Case Creation*) What channels does INPRS use to accept new cases?

Answer: INPRS has limited case creation capabilities in our current state. INPRS desires to utilize all Salesforce channels for case creation in our future state.

76. (Service Cloud *Case Creation*) What is the email domain(s) used to route Email to Case?

Answer: See question #75.

77. (Service Cloud *Case Creation*) How many case types? How many cases per day?

Answer: INPRS's expectation is that case types and cases per day will both change in our future state solution. Please provide details on incremental cost and impact of case type and volumes.

78. (Service Cloud *Case Creation*) What email or Slack communications go out to INPRS's customers during the case process?

Answer: See question #75.

79. (Service Cloud *Case Creation*) What fields will INPRS require in the highlight panel?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

80. (Service Cloud *Case Creation*) Which record lists should be pinned to the home page or record pages in the Service Console?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

81. (Service Cloud *Case Creation*) Does INPRS provide tiered support, and if so, how do each tier's entitlements differ?

Answer: All INPRS customers are serviced at the same level of entitlement. No differentiation is made for either member or employer customer groups.

82. (Service Cloud *Case Creation/Assignment*) Does INPRS collect customer feedback on its service performance, and if so, through which tool?

Answer: INPRS uses Survey Monkey for customer feedback collection. This is done manually from recent customer interactions. However, vendor should propose other solutions that may offer a more automated and/or cohesive experience for its customers.

83. (Service Cloud *Case Creation/Call Center*) Are any macros currently in use?

Answer: No.

84. (Service Cloud *Case Assignment*) What assignment rules are in place for cases?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS. Typically, the employee with the fewest cases is assigned new cases. There may be situations (such as for a new staff member) where a different assignment rule should be used.

85. (Service Cloud *Case Assignment*) Are cases routed based on agents who are most available or least active?

Answer: Yes. Skill based routing is not used at this time.

86. (Service Cloud *Case Assignment*) Are cases routed to users, skills, or queues?

Answer: See answer #85.

87. (Service Cloud *Case Assignment*) Do the cases need to be blocked based on criteria such as user email, phone number, source, etc.?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

88. (Service Cloud *Case Escalation*) What is INPRS's escalation procedure for each case type?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

89. (Service Cloud *Case Escalation*) When there is an update on the case, how is a team member identified and alerted?

Answer: There are no existing notifications to other team members when the case owner makes and update to a case.

90. (Service Cloud *Case Collaboration*) How many cases does INPRS receive from Email to Case and Web to Case each day?

Answer: See Question #77.

91. (Service Cloud *Case Collaboration*) Is INPRS planning to expose its Knowledge Base on the INPRS Community?

Answer: This is a likely outcome once INPRS validates the knowledge base articles.

92. (Service Cloud *Case Collaboration*) Does INPRS have Case Teams implemented?

Answer: Not today, however INPRS would like to utilize the best structure to ensure a cohesive service experience for our members particularly when hand offs are performed between departments.

93. (Service Cloud *Case Collaboration*) If so, are there predefined Case Teams, and who are the members on a case?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

94. (Service Cloud *Case Collaboration/Assignment*) What are the support processes around each case record type?

Answer: It depends on the case type to determine which back-office department should handle the case.

95. (Service Cloud *Case Tracking*) How does INPRS prevent duplicate cases?

Answer: There is no automated method to prevent duplicate cases. However, a view of existing cases for a member or employer would be helpful in reducing duplication. The vendor should propose other automated processes to prevent auto case creation duplicates.

96. (Service Cloud *Case Management*) Does INPRS use 'Einstein for Service' for case classification, article recommendations, or reply recommendations?

Answer: This is a new Salesforce implementation.

97. (Service Cloud *Knowledge Base*) How many Knowledge Articles does INPRS have?

   Answer: None. This is a new Salesforce implementation.

98. (Service Cloud *Knowledge Base*) What is the approval process for authoring Knowledge Articles?

   Answer: This will be a new process. Vendor can suggest process steps for authoring and approval.

99. (Service Cloud *Knowledge Base*) How many Data Categories are currently in use?

   Answer: See answer #98.

100. (Service Cloud *Knowledge Base*) Do Data Categories exist for the internal and external knowledge base?

   Answer: See answer #98.

101. (Service Cloud *Knowledge Base*) How many languages does INPRS support in its knowledge base?

   Answer: See answer #98. For member facing knowledge base, assume English.

102. (Service Cloud *SLAs*) Has INPRS configured milestones in its entitlement processes? If so, what are the SLAs for each milestone?

   Answer: Not currently.

103. (Experience Cloud) Is INPRS using a custom theme on Experience Cloud?

   Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

104. (Experience Cloud) What is the SSO provider for logging into Experience Cloud from the existing State of Indiana portal? (e.g., Amazon AWS, Microsoft Azure, Okta, etc.)

   Answer: INPRS expects to have a SSO provider, but this is yet to be determined.

105. (Experience Cloud) Has INPRS enabled a custom login flow or custom self-registration process for any community?

   Answer: No.

106. (Experience Cloud) Has INPRS integrated Google Tag Manager or Google Analytics with any of the communities?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

107. (Experience Cloud) What prompts should the Chatbot on the community present to a user?

Answer: Please propose your recommended solution.

108. (Experience Cloud) What records can a Chatbot reference during a chat?

Answer: INPRS anticipates the case record and knowledge articles can be referenced during chats. The vendor should propose other records as appropriate to achieve INPRS's goals.

109. (Experience Cloud) What records can a Chatbot update or create during a chat?

Answer: See #108.

110. (Experience Cloud) What are INPRS's branding requirements for each community?

Answer: We have a style guide that is utilized for INPRS Branding.

111. (Experience Cloud) Will INPRS build or revitalize a Partner Community as well as INPRS Customer Communities?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS. The two primary groups for community interaction are Member and Employers.

112. (Experience Cloud) How are Cases routed from the communities?

Answer: The two primary groups for community interaction are Members and Employers. Each have a Call Center team that handle cases.

113. (Experience Cloud) Is knowledge management currently integrated with communities?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

114. (Experience Cloud): How many featured topics does INPRS have on the community?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

115. (Experience Cloud) How many navigational topics does INPRS have on the community?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

116.   (Experience Cloud) Is INPRS tracking case deflection?

Answer: No, but this would be a useful metric to track how effectively cases are being handled.

117.   (Data Migration) Other than the existing Salesforce org, please confirm that no other legacy applications are in scope for data migration. If yes, then please list the applications and the objects/processes that need to be migrated to the new Salesforce org.

Answer: The Employer Reporting and Maintenance (ERM) system contains both Member master data and Employer master data. Both of these data sets need to be synchronized with Salesforce.

118.   (Data Migration) Is it ETL or ELT migration?

Answer: INPRS expects MuleSoft to be used for data migration.

119.   (Data Migration) Please confirm the objects and data volumes in scope for migration.

Answer: Member and Employer master data and Case data from Voya.

120.   (Data Integration / MuleSoft) Please confirm the following integrations and strategies that will be in scope: INPAS, ERM, IRP, and Voya.

Answer: INPAS, ERM, IRP, and Voya.

121.   (Data Integration / MuleSoft) For each system, kindly confirm the objects in scope, data frequency, data volume, and the number of fields in scope.

Answer: Specific data contents will be available during the discovery phase of the project.

122.   (Data Integration / MuleSoft) Could you please describe how MuleSoft is currently configured, architected, deployed, and leveraged at INPRS?

Answer: Currently using IOT instance for INPRS's integration needs.

123.   (Data Integration / MuleSoft) For each system, could you describe how external applications are able to access and interact with the data?

Answer: For each system, we expect MuleSoft to handle API calls for requesting data.

124.   (Data Integration / MuleSoft) Do you have documentation and developer guides available for each system that provide examples of how to interact with each object?

Answer: Information on how to interact with each object will be disclosed during the discovery phase of the project.

125. (Data Integration / MuleSoft) Additionally, for each system, please describe any security, authorization, or authentication requirements.

Answer: Information on how to interact with each API will be disclosed during the discovery phase of the project.

126. (Environment Mgmt.) Does INPRS have an org management strategy that they use for such transformational projects? If yes, please share it with us.

Answer: No org management strategy exists currently.

127. (Environment Mgmt.) Does INPRS follow any release management process or use any org migration tools?

Answer: INPRS currently uses Jenkins for CI/CD purposes.

128. (Environment Mgmt.) Please describe how many Salesforce Sandboxes INPRS currently has and the Sandbox Migration Path.

Answer: No Salesforce environments currently exist. We expect to have DEV, SIT, UAT and PROD with Sandbox as a possibility.

129. (Environment Mgmt.) Does INPRS have a release calendar in place to align release dates with sandbox refreshes?

Answer: INPRS has a release management process for its existing system deployments.

130. (Testing) Are any tools being used for conducting and recording testing results for Unit Testing, SIT, UAT, etc.?

Answer: INPRS performs manual testing during SIT with UFT and Selenium for automated testing. A Jira instance is used for defect management.

131. (Testing) Does INPRS follow any testing process/methodology?

Answer: See question #130.

132. (Testing) Is there a need for performance testing?

Answer: Not for Phase I of the project. Will need to consider for Phases II and III.

133. (Program Governance) What program management tools are used to create and manage program timelines, budget, and scope?

Answer: Microsoft Project and Excel.

134.   (Program Governance) Are there any other vendors with whom we are expected to collaborate as part of this implementation?

Answer: Voya Financial is the primary vendor for collaboration.

135.   (Program Governance) Does INPRS use Agile or Agile-Hybrid Implementation Methodology?

Answer: INPRS uses either traditional waterfall or Agile methodologies. INPRS has also utilized an Agile-Hybrid where development was performed in Sprints and the solution components were batched together for release.

136.   (Program Governance) What is the expected go-live date for this project.

Answer: Calendar Year 2024, To Be Determined in partnership with the selected vendor.

137.   (Program Governance) Are audited financial statements mandatory or can we submit the balance sheet and P&L?

Answer: Unaudited financial statements are acceptable.

138.   Clarification on 3.2 CRM General Scope, bullet point #3- please provide more information regarding marketing expectations including customer segmentation and analytics.

Answer: We're currently looking at API feeds into Salesforce. Marketing Cloud is currently out of scope.

139.   Under General Scope: For Knowledge, do you have knowledge content stored in a separate system that will need to be migrated or will it be built from scratch in Salesforce?

Answer:..Built from scratch in Salesforce.

140.   Under General Scope: Are there current reports we are trying to emulate, can we assume that the KPIs will translate into reporting requirements?

Answer: In general, KPIs should translate into MANY specific reporting requirements. INPRS will likely identify additional reporting needs as requirements are further defined. Please detail in your proposal the impact, cost, and approach for defining additional reporting.

141.   Under General Scope: How are they facilitating the capture of C-Sat scores: are there surveys etc. do we need to account for this in the scope?

Answer: Satisfaction scores are captured via surveys. Survey execution is not in scope for this RFP.

142. Under KPIs, can you provide more detail/defined calculations for Feature Utilization Rate, Training Completion Rate (is this from an LMS?), and Error Rate in Processes?

Answer: KPIs provided are for example purposes. KPI details will be defined during the planning and analysis phase of the initiative.

143. Is English the only language supported?

Answer: Yes.

144. Are we able to use Offshore Resources?

Answer: We do not wish to engage offshore resources for projects of this nature.

145. Are there historical cases or cases in flight that need to be migrated from a different system?

Answer: INPRS is currently open to either approach: starting with new go-forward cases only or migrating existing cases. Please provide recommendations on the approach you believe best and the related risk/rewards for INPRS to consider.

146. What is the overall state of the data from a quality perspective?

Answer: INPRS's master data management initiative was recently started. The quality of data is not known at this time.

147. MDM:- Can you please share MDM strategy documentation: If not available, we would like to know the answers to the following questions:

- What business/data domains are being considered for MDM?
- Have you selected the technology platform for the MDM?

Answer: These questions are currently under consideration, but have not been finalized.

148. Can you please share any decisions that have already been made on strategy for golden record authoring capability (e.g.- central versus distributed), survivorship rules, data consumption expectations & SLAs etc.?

Answer: These questions are currently under consideration, but have not been finalized.

149. Reporting and analytics: Can you please elaborate on the use cases for reporting and the need for real-time analytics?

Answer: Please detail all recommended approaches for reporting to provide a robust CRM ecosystem. INPRS is seeking high level KPI dashboards across its line of business, that will also enable drill-downs into specific data attributes more granularly. Most reporting will likely be workflow reviews following case transactions (daily/weekly/monthly/quarterly/annually) rather than real time but please detail considerations and related cost/impact.

150.   Data Governance: Can you please elaborate on the current state of Data Governance program?

Have you selected tools for Data governance and data quality?
Have you already identified data stewards and domains?
Can you please share information on data quality issues notification, escalation, and remediation process and SLAs?

Answer: INPRS is still early in its MDM program. These topics are currently under consideration, but have not been finalized.

151.   Can you please elaborate on how transparent/ integrated role-based security implementation is desired? E.g.- is it only within the Salesforce application only or all ancillary applications which include MDM and reporting and analytics?

Answer: For purposes of this RFP response, the scope will be the Salesforce application only.

152.   What kind of process documentation exists currently?

Answer: See Question #46.

153.   Has any sort of process automation technology been implemented (such as RPA or BPM)?

Answer: Oracle BPM process automation has been implemented at INPRS. However, the vendor proposal should not consider this tool for automation purposes.

154.   How many people work in the Customer Interaction and Enablement areas? Does this include call centers? Outside of Salesforce, are there other technologies in place?

Answer: Approximately, 170 staff members (including the Call Centers) support the Customer Interaction and Enablement areas. Yes, other technologies are in place.

155.   Will the scope of process evaluation be contained within the Customer Interaction and Enablement areas?

Answer: All areas should be considered.

156.   When will the other related RFPs be released, specifically the OCM RFP and MuleSoft RFP?

Answer: The OCM RFP is targeted for late November 2023. A MuleSoft RFP is TBD.

157.   Do you know if it's allowed to award all 3 RFPs to one partner?

Answer: Awarding to the same vendor is possible.

158.   Would you be able to provide us with your MSA for review?

Answer: The RFP contains a sample Contract for Services.

159. Could you please clarify whether the RFP's requirement regarding indemnification and liability takes precedence over the standard terms and conditions typically offered by technology providers, such as Salesforce? We seek clarification to ensure alignment between the RFP requirements and our proposed solution.

Answer: Yes. The RFP's requirement regarding indemnification and liability will take precedence over the standard terms and conditions typically offered by technology providers. In addition, INPRS will also be purchasing Salesforce licenses from government sector resellers that modify typical technology provider terms.

160. What are the key objectives and outcomes expected from the implementation of Salesforce Service Cloud across the multiple functional areas?

Answer: See the pre-proposal slides at the end of this document and the RFP.

161. Could you elaborate on the "customization footprint of no more than 1%"? What specific customization limitations or requirements are in place for this project?

Answer: See the pre-proposal slides at the end of this document.

162. Can you provide information on the existing systems (e.g., INPAS, ERM, IRP, Voya) that need to be integrated with Salesforce in each phase of the project?

Answer: See question #58.

163. Are there any specific complex regulatory requirements that the selected vendor should be aware of and have experience working with?

Answer: See the previous experience and reference section in Appendix C – Management Proposal of the RFP.

164. Can you clarify whether Phases 2 and 3 (Section 2.3 Proposed Solution of RFP) are optional extensions to the initial contract, and if so, under what conditions they may be triggered?

Answer: ANSWER REVISED - SEE THE FIRST PAGE OF THIS DOCUMENT.

165. Can you explain the scope and expected outcomes of the purely Service Cloud-focused implementation and the optional Sales Cloud implementation services?

Answer: See answer to question # 59 regarding Sales Cloud.

166. Are there any specific organizational needs or challenges you anticipate in the future that the proposed solution should be able to adapt to?

Answer: INPRS believes that the future of our trusted to pay model where the fundamental activities of bringing data and money in from employers and then paying benefits out to retirees will be increasingly automated, with more complex cases requiring staff intervention. Over time INPRS staff focus will shift from less simple processing to exception handling, retirement education and engagement, etc.

167.   Are there specific Go-Live periods that the project should adhere to?

Answer: None noted.

168.   Section 3.4 states integrations will be accomplished and managed within MuleSoft; does INPAS already have MuleSoft Licenses or is the vendor required to include this in our proposed solution?

Answer: MuleSoft Licenses will be purchased from other sources outside of this contract's scope.

169.   Can you provide more details on the preferred approach for training and the extent to which Salesforce administration skills should be transferred to INPRS's IT staff?

Answer: Vendor should assume INPRS's IT Staff have introductory Salesforce administration skills. Vendor should document the user setup, and configurations specific to INPRS and train on how those items should be maintained.

170.   What kind of post-implementation support and continual learning opportunities are you looking for, and how frequently should they occur?

Answer: Vendor should support INPRS throughout all Agile releases until final release is implemented in Production and post go-live support in Production for a minimum of 90 days after final go-live.

171.   Can you elaborate on the specific business goals and vision for INPRS's modernization, and how these align with the project's success criteria and metrics?

Answer: See the pre-proposal slides at the end of this document.

172.   What are the key pain points and inefficiencies in your current processes that the new solutions should address?

Answer: See the pre-proposal slides at the end of this document.

173.   Please confirm that there are no other data migration requirements other than the data synchronization with Voya's instance.

Answer: See questions #117 and 120.

174.   What are your expectations regarding compliance with legal regulations such as FedRAMP and HIPAA?

Answer: For certain case types, INPRS expects to collect health information for members in its 77 fund (police officers baseline physical exam). The exam data should be in compliance with HIPAA.

175.   Could you provide more information on the key performance indicators (KPIs) and how they will be tracked within the system?

Answer: For Phase I at a minimum, INPRS would expect metrics around case handling duration. Other KPIs will be documented during user requirements for the given process.

176.   In Section 2.3, in Phase 3, in the 5th bullet, there is mention of an existing MDM strategy. Is INPRS willing to share any of the documentation for the established MDM strategy? Secondarily, if the out of the box data model of salesforce is in conflict with the MDM strategy will the non-customization directive take precedence or the MDM strategy take precedence?

Answer: INPRS is currently in the process of defining MDM. INPRS expects the vendor to work within any future guidelines for handling data.

177.   In Section 2.3, in Phase 3, in the 8th bullet again there is reference to MDM. We are assuming that Salesforce will be the system of record for CRM related data. Is that a safe assumption?

Answer: Yes, this is a good assumption.

178.   In Section 2.3, in Phase 3, in the 10th bullet it is specifically mentioned that an Agile methodology is to be used. We are assuming that a hybrid agile methodology is acceptable, can you please confirm?

Answer: Yes, assuming vendor's definition of hybrid agile if that development is performed in Sprints and system components are migrated to production in batched releases.

179.   In Section 2.4 it is stated that we are to work with the to be determined OCM vendor for training. Is the OCM vendor only responsible for creating a training plan, or are they also responsible for actually conducting the training and we are responsible for training them?

Answer: See Section 3.7 of the RFP.

180.   In Section 2.4 in regards to training, can we assume that INPRS IT staff are familiar with the Salesforce platform and the training we need to provide is directed at how the platform has been specifically configured to meet the needs of INPRS?

Answer: Yes, INPRS staff will attend Trailblazer courses in advance of vendor supplied training to gain a general understanding of Salesforce.

181. In Section 3.4, the first bullet, the second sub bullet, it is mentioned that INPRS or another 3rd party will take on any MuleSoft work. There would be efficiencies if the same team doing the CRM implementation could also take on the MuleSoft work. Is that something that is still a possibility?

Answer: MuleSoft APIs are planned, but not in the scope of this RFP. They will be written in-house or through another contract.

182. Could you please inform us of the target date for the new INPRS solution's go-live?

Answer: No specific target go-live date has been established.

183. Are there any training programs or certifications that the agency would like us to prioritize?

Answer: No. The vendor should propose training programs and certifications they feel are appropriate for the INPRS project.

184. What are the various permission levels required? For instance, Super Admin, Super User, Team Manager, and General User Could you detail the access rights for each?

Answer: This is a new Salesforce instance. As such, it is up to the vendor to propose whether this functionality is appropriate for INPRS.

185. To optimize the user experience, we would like to understand the estimated volume of interactions, including website visits, phone calls, and text communications.

Answer: Secure website – 1,894,140; Incoming calls – 162,515. Outgoing calls – 20,918; NO Text Msg.

186. How many integrations with external systems such as INPAS, ERM, IRP, and Voya are anticipated for the new INPRS solution?

Answer: Will be dependent on system design and determined during the design phases of the project.

187. Regarding the Marketing/Communication Automation and General CRM scope, is INPRS leaning towards utilizing Salesforce Marketing Cloud, or is there an inclination to develop custom functionalities within Salesforce Service Cloud tailored to user requirements?

Answer: We're currently not pursuing Salesforce Marketing Cloud.

188. Which communication channels does INPRS prioritize for a holistic, 360-degree user experience—mobile devices, websites, phone calls, or other channels?

Answer: Our focus is channel of choice by the member.

189.	If ERM is the principal source for demographic data during Phase 1, would there be a need for bidirectional synchronization of certain elements?

Answer: Yes, this is a good assumption.

190.	Concerning the integration with Voya and financial data, could you specify the security standards and protocols expected for the Salesforce implementation?

Answer: Please propose a best practices solution.

191.	Does Voya support orchestration of workflows or tasks through integration?

Answer: We are not aware of any workflow orchestration or data integration solutions at Voya. We do not believe Voya has licensed MuleSoft.

192.	Are there any constraints on the format or length of our RFP response, such as font size or page limits?

Answer: A cogent response of adequate length to understand your response is desired. We trust your judgement to respond as needed, but have not set any constraints on proposal length.

193.	Is it imperative for our proposal to include solution approaches for Phase 2 and Phase 3?

Answer: It is not imperative to provide the subsequent phases. If the Phase I implementation is your strength, we welcome your proposal, but we are also open to a vendor partnership if that combination lends itself to address all phases.

194.	Could you guide us on where to incorporate Appendix C within the business proposal?

Answer: Include all the appendix materials in alphabetical order at the end.

195.	Are there any specific modules or scopes within this project that necessitate a Sales Cloud implementation?

Answer: INPRS does not believe so, but would like vendors to propose solutions based on their understanding of INPRS's needs.

196.	Does INPRS currently operate with an existing sales cloud solution that requires integration with the new system?

Answer: No.

197.	Are there any specific limitations or requirements concerning integration protocols that we should be aware?

Answer: None that we are aware of at this time.

198.   For our technical team's understanding, how many MuleSoft cores are currently being leveraged by INPRS for integrative tasks?

Answer: No MuleSoft integrations are currently in Production.

199.   Is Salesforce providing any admin training with licenses?

Answer: This has not been determined at this time.

200.   What is the level of training expectation for management vs. internal end users vs. external users?

Answer: Training strategy to be defined as part of the OCM engagement.

201.   Are there any external portal expectations for non-authorized users?

Answer: INPRS does maintain some FAQ pages on our public website that may be appropriate for non-authenticated users.

202.   What are the existing customer service processes?

Answer: See attachment with the full catalog of business processes.

203.   What future uses of Salesforce are being considered?

Answer: Marketing Cloud may be considered for member journey maps as a future use of Salesforce.

204.   Has there been a design selected for the integration with Voya? For instance, is the plan to use MuleSoft, Lightning Connect, Customer Data Platform (CDP), External Objects or something else?

Answer: No integration design has been selected for Voya. Vendors are encouraged to make a recommendation based on experience and INPRS's needs.

205.   Will the knowledge base be created from scratch, or will an existing knowledge base need to be migrated? Or combination of the two?

Answer: A new knowledge base will be created.

206.   Will the knowledge base be targeted for members, employers and staff? Which audience will be addressed in each phase?

Answer: Phase I – Staff, Phase II – Employers, Phase III – Members.

207.   Will any MuleSoft services be needed for this response? If so, please provide the number of integrations and description of each. If not, please confirm the MuleSoft work will be a separate RFP.

Answer: MuleSoft APIs are planned, but not in the scope of this RFP. They will be written in-house or through another contract.

208.   When does INPRS plan for the MuleSoft services to be ready for use by Salesforce? In the interim what is the suggested approach to integrations?

Answer: INPRS will align its MuleSoft development services to coincide with vendor's need for integrations.

209.   Given that Salesforce Marketing Cloud has not been included in the licensing, has INPRS selected an email marketing tool for the mass email communications requirements?

Answer: We are currently using Delivra for mass email communications.

210.   Given that Salesforce is hosting the platform and final solution, how does INPRS recommend the SI (respondent to this RFP) satisfy this request?

Answer: Not sure of the intent of this question.

211.   How does INPRS define Customization? For instance, is customization limited to "coded" elements or does INPRS have anything outside of standard objects, fields and functionality as custom? Do custom objects and fields count as customization? Please provide the formula for calculating customization. This was quickly shared during the Pre-Proposal Conference.

Answer: Custom objects and fields are considered customization. INPRS will work with the selected vendor to strike the right balance. (trade-offs) between a fully customized solution that fully meets a business request versus a more out of the box solution that still meets the need but is not the perfect solution.

212.   Is there an existing governance structure in place to monitor and for approval of customizations?

Answer: The Governance structure for approval of customizations will be newly formed for the project.

213.   Is it possible to extend the proposal due date?

Answer: We have thoughtfully planned the due dates and do not plan to extend them.

214.   Can INPRS elaborate on the expectations for a single access point and unified experience? Is this more about look and feel versus architecture/design requirement?

Answer: This primarily applies to Phases II and III and refers to Members and Employers going to their individual access points.

215.   Please elaborate on the intended audience for the self-service reporting capabilities.

Answer: For Phase I, self-service reporting refers to internal INPRS staff.

216.   Please confirm the timeline for the delivery of Master Data Management project currently on-going.

Answer: Yes, the MDM timeline is ongoing.

217.   Is there an estimate on the amount of data cleansing for the data catalog needed? Is there an expectation that Salesforce will manage or be utilized for the data cleansing?

Answer: INPRS requests vendors to propose the best practice for data cleansing approach.

218.   Are there any external portal expectations for non-authorized users?

Answer: See question #201.

219.   Are there any expectations on the timeline for discovery and implementation?

Answer: To be determined upon award.

220.   What are the expected collaboration activities with the selected OCM vendor?

Answer: See section 3.7 of the RFP.

221.   Appendix D - Item 5 - Please clarify the expected division of deliverables regarding Training and Change Management between the selected implementor and selected OCM vendor.

Answer: This question is to understand training development and delivery approaches. Responses to this aspect are not a determining factor in the final award.

222.   Outside of Salesforce Reports/Dashboards, does INPRS have other reporting tools or preferences on future tools that should be utilized as part of this project?

Answer: Looker or Tableau can be considered additional reporting tools.

223.   The RFP refers to needed reporting, how many distinct reports or dashboards does INPRS anticipate?

Answer: The number of distinct reports/dashboards will be determined during the design phase of the project.

224.   What processes do you want to be evaluated? All 165 listed in Appendix G spreadsheet or just the Member Advocate and Employer Advocate processes (66)?

Answer: All processes should be considered.

225.	What is the anticipated IOT engagement for this project, if any?

Answer: No IOT engagement is anticipated for this project.

226.	Can you please share the budget that been allocated for this particular scope of work?

Answer: INPRS is not prepared to share the budget for this project.

227.	Are there any restrictions about using offshore or near shore resources?

Answer: All resources should be US based and able to pass standard State of Indiana background checks for third party contractors.

228.	Does INPRS Intend to utilize Access Indiana for authentication?

Answer: INPRS is considering using Access Indiana to authenticate Employer and/or Member users.

229.	Do you have an anticipated budget for this project? If so, will you share the budget amount?

Answer: INPRS is not prepared to share the budget for this project.

230.	Do you see any circumstance where the number of licenses listed in 3.2 would not meet expected demand for use? If yes, please provide additional details.

Answer: The license counts provided are the best available estimate for anticipated users.

231.	Is the agency currently using another system and/ or vendor for this functionality? If so, what is the system/vendor? If not, how is the functionality currently being managed?

Answer: INPRS does not currently use a CRM system. Some employer case handling is performed in the 8X8 telephony system. Member case handling is performed in Voya's Salesforce system.

232.	Will this project require data migration from existing systems? If so, please describe the data, the number and type of records, the total size of the files, etc.

Answer: Refer to Questions #117.

233.	Please list the external systems that will need to be integrated?

Answer: Refer to Question #27.

234.	Do the systems you wish this solution to interface with have APIs available? If so, are they available for review? If not, please describe integration capabilities.

Answer: There are no existing APIs to review. However, we expect to deploy APIs in MuleSoft for system data integration (INPRS systems). The data integration for Voya will be handled separately.

235. Have you seen demonstrations of systems prior to issuing this RFP? If so, will you share which systems?

Answer: INPRS has received demonstrations of other systems.

236. Regarding insurance requirements, would you accept our Umbrella Policy to meet the required amounts?

Answer: That would depend on the coverage in the policy. We do not expect problems if you carry coverage that is reasonable and customary to do business of this nature.

237. What is the timeline for the OCM RFP? Can the same vendor be considered for both RFPs?

Answer: See question #58.

238. Does INPRS mandate that all project team members be located onshore, or would a hybrid onshore/offshore model be permissible?

Answer: Propose an onshore staffing model.

239. Is there a specific criterion regarding the minimum number of years of Salesforce implementation experience required for the contractor?

Answer: There is not a specific minimum requirement, however experience is a criteria when evaluating vendors.

240. With respect to the Marketing/Communication automation requirement, is Salesforce Marketing Cloud the stipulated platform, or would INPRS be open to contractor recommendations in the proposal?

Answer: INPRS is currently using Delivra as mass email communication platform. However, we are open to contractor recommendations.

241. Could you please specify if INPRS currently employs any Business Analytics tools, such as Tableau, in its existing system landscape?

Answer: INPRS does not currently license Tableau but will consider this tool as part of the vendor proposals.

242.   Regarding data migration, could you provide an estimate on the current case volume (number of records) that needs to be transitioned to Salesforce? Additionally, is there a requirement or preference for an archiving solution?

Answer: No cases are planned to be migrated. The archiving solution has not been chosen and will need to be determined at a later date.

243.   (3.1 Data Strategy) In the RFP document, there are requirements around integration with the Voya Salesforce org. During the kickoff call, it was mentioned that instead of an integration that data might be migrated instead. Can you clarify the goal and preferred method for integrating with Voya?

Answer: The intent is for INPRS to maintain a synchronized copy of Voya's case data. This implies an initial load of existing cases AND an ongoing integration with Voya for newly created cases.

244.   (Appendix G) Do you have any other business requirements besides this excel document (INPRS processes Catalog)?

Answer: These processes represent the majority of INPRS's business processes for case management and workflow. There could be other requirements discovered during the project.

245.   (2.3 Phase I) Are there existing knowledge articles that will need to be migrated to Salesforce? If not, who will take responsibility for writing new articles, and in what format will they be delivered?

Answer: There are no Existing knowledge articles.

246.   (1.21 Summary of Milestones) Do you have any pre-defined demo requirements? What are you expecting to see?

Answer: If a vendor is selected to do an oral presentation, INPRS is suggesting the vendors do a "live" presentation of their proposal. This can include a system demo (if available) or a slide presentation of vendor capabilities and solutions.

247.   (2.3 Proposed Solution) Which of these business requirements in the Excel document (INPRS Process Catalog) aligns with phase 1, 2, 3?

Answer: The process descriptions provided refer to Phase I of the project.

248.   (2.3 Proposed Solution) What is the current ERM system? Is the integration with that system planned to be accomplished using MuleSoft?

Answer: ERM is the Employer Reporting and Maintenance system. Yes, there will be planned integrations with ERM to Salesforce via MuleSoft.

249.   Please confirm integrations are to be excluded from the 1% customization calculation.

Answer: Yes, integrations are excluded from the 1% customization target.

250.   Please provide the number of objects in scope for reports, integrations, and conversions that should be estimated.

Answer: This will be determined during the solution design phase of the project.

251.   Please confirm that data cleansing and data migration are in the scope of this RFP.

Answer: INPRS does not expect data cleansing to be a major component of the project. We do expect data migration with limited data transformation.

252.   The RFP requests Agile delivery and Fixed Fee. In our experience, most clients requesting this combination of methodology and contracting are actually seeking iterative development of fixed scope for a fixed fee. Can you confirm INPRS's expected application of Agile in the context of this RFP should be interpreted as a methodology for iterative development of fixed scope as defined by this RFP?

Answer: Yes, INPRS is seeking a proposal to deliver a fixed scope of work in an Agile methodology for an agreed upon price.

253.   During the "Initial Analysis and Planning" phase outlined in section 3.1, additional requirements may be discovered that would change the basis of the fixed scope defined in this RFP. Does INPRS expect to use the completion of this phase to validate the original fixed scope expectations and/or to adjust the fixed scope expectations through the program's change control process?

Answer: INPRS is expecting each vendor to make their proposal based on the "original" scope of work. At major milestones during the project, the vendor should validate that scope and costs are still on track to the original proposal. Should a new scope item be discovered, INPRS is open to using Change Management to authorize scope and cost revisions.

254.   Can INPRS provide a weighted scoring matrix that will be used in evaluating scoring of responses?

Answer: No.

255.   The RFP doesn't clarify permissible work locations. Please confirm that INPRS requires all services associated with this RFP to be performed onshore.

Answer: Yes, INPRS expects work to be performed onshore.

256.   (2.3 Proposed Solution p. 10 *Data*) What are your data sources for the INPRS application?

Answer: Refer to Question #27.

257.   (2.3 Proposed Solution p. 11 *Data*) Can you confirm if for Phase 1 we will need to integrate with any other applications besides Voya's Salesforce instance & ERM? For example, INPAS, IRP?

Answer: Refer to Question #27.

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258.   (2.3 Proposed Solution p. 11 *Data*) What is the difference between Tier 1 and Tier 2 applications?

Answer: Tier 1 and Tier 2 refer to the INPRS Call Centers. The Tier 1 Member Call Center is located at Voya Financial. The Tier 2 Member Call Center is located at INPRS. A single Tier Employer Call Center is located at INPRS.

259.   (3.1 Initial Analysis and Planning p.16 *Data*) Will data conversion be scope as part of Phase 1?

Answer: Refer to Question #117.

260.   (3.1 Initial Analysis and Planning p.16 *Data*) What data (e.g., objects) do you need for day-0 from Voya or other databases in the new Salesforce org?

Answer: Refer to Question #27.

261.   (3.1 Initial Analysis and Planning p.16 *Data*) Will data clean-up be required? Who will be responsible for cleaning the data?

Answer: Refer to Question #252.

262.   (3.1 Initial Analysis and Planning p.16 *Data*) Can you provide a rough estimate of the record count of data to be cleaned-up & migrated?

Answer: Approximately 500,000 members and 2,000 employers.

263.   (2.3 Proposed Solution p. 10 *Integration*) Would we require one-way sync from Voya to Salesforce or should there be a two-way sync?

Answer: INPRS is expecting a two-way sync with Voya.

264.   (2.3 Proposed Solution p. 11 *Integration*) Where are you in your MDM program timeline? Would we be interacting with an MDM application in Phase 1 or is that part of Phases 2 or 3?

Answer: INPRS is early in our MDM program. We do not expect an MDM application to be live during the Phase I project.

265.   (2.3 Proposed Solution p. 11 *Integration*) Are there existing member and employer portals in Phase 1 that Salesforce will need to integrate with prior to the implementation of a Salesforce portal?

Answer: No, there are no existing portals for integration as part of Phase I.

266.   (3.3 Case / Workflow General Scope p. 19 *Integration*) When are you intending to achieve 360-degree view of customers? Phase 2 or 3?

Answer: Employer 360-degree view in Phase II. Member 360-degree view in Phase III.

267.   (3.2 CRM General Scope p. 19 *Integration*) Does this scope of work fall under the MuleSoft contract?

Answer: Vendors are not asked to propose MuleSoft integration costs as part of any Phase of project. However, the vendor will be expected to incorporate MuleSoft integrations with the proposed solution.

268.   (3.6 Customizations / Upgradeability p. 21 *Development*) In the event that a requirement cannot be met through configuration of standard Salesforce features, are you willing to leverage App Exchange packages? If so, would this count against 1% customization?

Answer: INPRS is open to vendor proposals that include App Exchange packages.

269.   (3.6 Customizations / Upgradeability p. 21 *Development*) What is classified as customization? Would custom objects/custom fields be considered custom vs. declarative configuration?

Answer: Refer to Question #161.

270.   (3.6 Customizations / Upgradeability p. 21 *Development*) How do you plan on assessing 1% customization?

Answer: Refer to Question #161.

271.   (3.6 Customizations / Upgradeability p. 21 *Business Process*) Are there any business or regulatory requirements that must be met even if they require customization (i.e. cannot be configured)?

Answer: There are no regulatory requirements. However, there could be business requirements that must be met. Customization requests will be reviewed and approved on a case-by-case basis.

272.   (2.3 Proposed Solution p.10 *Business Process*) What is your current process for handling INPRS and case management?

Answer: Limited employer cases using our telephony solution. Some member case management using the Voya salesforce system.

273.   (3.3 Case / Workflow General Scope p.19 *Business Process*) Do you have an existing Knowledge Base or would one need to be created to support Knowledge Base documentation in Service Cloud? Who would be responsible for documenting these articles?

Answer: INPRS does not have an existing knowledge base. This will be created during the project. The content for the articles will be created outside of this proposal.

274.   (Appendix A.1 Section 33 p.25 *M/W/VBE*) What is the required percent of participation for M/W/VBE?

Answer: We would like to know the level of participation in these areas, but it will not be used in scoring your response.

275. (3.7 Separate RFP for Organizational Change Management (OCM) p.21 *OCM Services*) The RFP states a separate RFP for OCM services will be issued, is there the possibility of OCM services to be awarded through this RFP?

Answer: OCM services will be awarded through a separate RFP.

276. (Section 2.3 Phase 2 p.10 *Other Technologies*) Has the agency determined which modern telephony system will be used as this will aid in understanding future activities with Call Center operations and management?

Answer: No. INPRS has not decided on its modern telephony system. The State of Indiana is using Genesys. This is one option being considered by INPRS as a quasi-agency.

277. Do you have an estimate of the volume of data to be migrated, what is the complexity of the data and is there a need for cleansing?

Answer: Refer to Question #252.

278. Is there any requirement for active directory for SSO?

Answer: The expectation is the solution will use the State of Indiana Active Directory solution for INPRS staff users.

279. In section 3.2, the language stating, "To increase effectiveness regarding communication with members and employers the system will need to be configured to support campaign management, email communication, and customer segmentation and analytics." would likely require Marketing Cloud to perform those functions, but that is not included in the BOM. Is it safe to assume this component is not in the current scope?

Answer: That is correct, Marketing Cloud is currently not in scope.

280. Onsite vs. Offshore: Is this opportunity intended for onsite work, offshore work, or a combination of both?

Answer: Onshore only.

281. Tax Registration Criteria: Could you please specify the tax registration criteria that vendors need to meet in order to be eligible for this project. As we don't have tax registration in Indiana , can we apply for it online and bid on the RFP?

Answer: Respondents do not need to register with the Secretary of State in order to respond to the RFP, but registration will be required prior to executing a contract.

282.   Type of Firm: Is this RFP open for all types of firms like local, national, or an international firm?

Answer: Any firm can respond. We reserve the right to evaluate the risk of any offshore operations considering the confidential nature of a large pension plan's data security. The scope of this RFP will be onshore, but that does not exclude all international respondents as a group.

283.   Please advise if some of the work can be performed outside of the USA, such as in Canada, India, or other locations.

Answer: See question #238.

284.   To ensure the delivery of a high-quality and optimized response, we kindly request a three-week extension.

Answer: See question #213.

285.   We understand that case creation via email, web, and social media is within the scope of Phase 1. Can you please confirm this?

Answer: For Phase I, INPRS expects manual case creation, email case creation, and Voya integration cases.

286.   Are you currently creating cases from social media, and if so, could you provide details on how this process works? Additionally, for the planned Salesforce ecosystem, do you have Salesforce licenses that allow for case creation through social media? Furthermore, could you please specify which social media platforms are currently being used for case creation, as well as any additional platforms that are being considered for the new system?

Answer: Creating cases from social media will not be considered until Phase III.

287.   It seems that Call Center Integration with Salesforce and the setup of Computer Telephony Integration (CTI) will be part of phase 2. Could you please confirm this understanding?

Answer: Yes, INPRS expects telephony integration for Phases II and III.

288.   The request is to implement Omni Channel capabilities in Phase 3, but there may be a need for it earlier. Is there a specific reason for keeping this in Phase 3, or is there flexibility to consider it in an earlier phase if required?

Answer: Yes, there is flexibility to consider this capability earlier.

289.   Can you please provide the number of knowledge articles/FAQs to be migrated? Also, please let us know if there are any attachments. Please provide the number of attachments, size and type.

Answer: This is a new deployment of knowledge articles.

290. What are the existing systems or applications that Salesforce Service Cloud needs to integrate? Please share existing landscape details along with integrations.

Answer: Refer to Questions #27 and 117.

291. We understand that you have a Master Data Management (MDM) system in place. Could you please provide information on how many tables or objects need to be synced between the MDM system and Salesforce?

Answer: No synching requirements exist for MDM and Salesforce for Phase I.

292. We understand that data synchronization is expected between Salesforce and Voya, which is another Salesforce instance. Could you please specify the number of objects that need to be synced between these systems? Additionally, could you clarify if this synchronization should occur in real-time or through batch processes?

Answer: The case object for members should be synchronized.

293. Could you please provide a list of all the entities that need to be migrated to Salesforce and specify their respective volumes from a Salesforce perspective?

Answer: Refer to Question #117.

294. Could you please provide information on the security and data encryption features currently used in the system? Additionally, could you specify the security testing technologies that are currently in use and share more details about them?

Answer: We will share this with the successful bidder.

295. Please let us know the volume of emails sent out per day and frequency of campaigns. Also, please confirm if salesforce marketing cloud licenses are procured OR could you please provide information on the volume of emails sent out per day and the frequency of campaigns in the current system? Additionally, please confirm whether Salesforce Marketing Cloud licenses have been procured or are planned for "Marketing/Communication Automation" purposes.

Answer: These numbers will be decided as the design matures.

296. Could you please provide information about the ticketing system or tool that is currently being used?

Answer: minimal use of 8X8 telephony system for employer cases. Voya Salesforce is used for member cases.

297. Could you please share if there are any specific pain points or areas for improvement that you would like to address through the proposed solution?

Answer: See the pre-proposal slides at the end of this document.

298.   Could you clarify what functionality will be achieved with the Salesforce scheduler that the Salesforce Sales team has proposed?

Answer: Scheduling of retirement counseling sessions.

299.   We assume that Salesforce Shield will be implemented based on the suggestion from the Salesforce Sales team. Can you please confirm this?

Answer: For this proposal, assume that Salesforce Shield will be used.

300.   For Phase 2 & 3, could you provide more details about any key milestones or KPIs that INPRS has in mind for tracking the progress of the project?

Answer: Self-service case avoidance, customer satisfaction, and initial wireframe design for portals.

301.   Can you please explain how your Voya system currently works, and what potential additional integrations you may require in the Voya system processes after the implementation of Salesforce/Service Cloud?

Answer: Voya's instance is used to manage member interactions. If calls need to be escalated to the Tier II call center (INPRS) an INPRS salesforce case is created with status and resolution communicated back to Voya.

302.   Can you please advise if you have any preferred implementation timeline, such as the start or end of the project? Are there any project freeze periods in your migration calendar?

Answer: There is no preferred implementation timeline. There are no known freeze periods outside of typical state holidays.

303.   For references, INPRS has asked for a vendor-hosted solution. Does this refer to a Salesforce-hosted solution?

Answer: This refers to a Salesforce or other CRM Software as a Service (SaaS) reference.

304.   Is the vendor required to be on site for any portion of the contract term?

Answer: Yes, from time to time as needed.

305.   Are there any Security needs required to maintain the data? I.e., FEDRAMP and audit requirements? If so, please describe.

Answer: Please see the sample contract for more details.

INPRS RFP 23-03
Salesforce CRM Implementation

October 3, 2023

Bidders Conference Agenda

- Schedule
- Compliance to RFP
- Modernization for Transformative Change
- Overview of RFP
- Evaluation Criteria
- Questions and Answers
- Wrap Up

Schedule

ACTIVITY	EXPECTED DATE
Release of RFP	September 26, 2023
Pre-proposal Conference Call	October 3, 2023, 1:00 P.M. (EDT)
Respondent's Inquiry Period Ends	October 6, 2023, 3:00 P.M. (EDT)
Answers to Inquiries Published to Website	October 13, 2023
Submission of Intent to Respond	October 18, 2023, 3:00 P.M. (EDT)
Respondent RFP Submissions Due	November 3, 2023, 3:00 P.M. (EDT)
Finalist Presentations	December 18, 2023
Selection of Finalist	January 3, 2024
Contract Negotiation	January 8, 2024
Commencement of Services	February 9, 2024

Compliance to RFP

- No Unauthorized Communication
  - Formal Contacts are Outlined in the RFP

- Due Dates are Strictly Adhered

- Confidential Information Identified as Outlined in Section 1.14

- All Proposals must remain Open and In Effect for 180 days

- Appendix A.1 – Essential Clauses must be accepted

INPRS

Modernization for Transformative Change

- Address key challenges identified by INPRS

- Current business processes involve significant manual effort

- Analyze existing workflows and facilitate the achievement of the "Future State"

- Salesforce Service Cloud to implement Workflow and Case Management is the vehicle for change

- Vendors are encouraged to partner to bring the strongest solution across all project phases

- INPRS desires less than 1% customization of unique Salesforce Objects – Solution must be implemented using Salesforce Objects

INPRS RFP 23-03 Salesforce CRM Implementation

RFP Overview

Three Phase Modernization

- Phase 1
  - Implement core CRM platform including case management, workflow automation, and knowledge management capabilities
  - Integrate to key INPRS systems and strategic partners to enable workflow automation

- Phase 2
  - Implement Employer Portal, integrate call center and modernize telephony solution
  - Enable Employer Content & Channel Management capabilities

- Phase 3
  - Implement personalized Member Portal
  - Enable Member self-service and omni-channel capabilities
  - Assess if Salesforce will be used as the front-end of the public website/portal and or member account access

Scope of Services - Highlights

- Initial Analysis and Planning
  - The Vendor will provide an in-depth review of business processes, ensuring the Current State and Future State is accurately captured
  - Technical Assessment and Data Strategy provides the foundation for all phases
  - Governance and Security must take into account the sensitivity of INPRS data

- CRM General Scope
  - The Vendor will work closely with INPRS 3rd Party Record Keeper, VOYA
  - Key Performance Indicators (KPIs) listed are examples – The Vendor is encouraged to suggest others deemed appropriate
  - Initial Licensing has been determined by Salesforce. The Successful Vendor will have experience in optimizing use of licenses and assisting in future license needs.

Salesforce Service Cloud Licensing

Product	Quantity
Service Cloud - Unlimited Edition	158 (80 Initially)
Customer Community - Unlimited Edition (Members)	4,500
Service Cloud - Voice	34
Salesforce Scheduler - Unlimited Edition	10
Customer Community - Unlimited Edition (Logins/month)	50,000
Government Cloud Plus	1
Salesforce Shield	1
Lightning Platform - Unlimited Edition (Administrators)	66 (10 Initially)
OwnBackup for Salesforce	1

Note: INPRS is independently procuring these licenses. The Vendor IS NOT expected to include Salesforce license costs in the proposal, however the Vendor may provide a separate quote for the license quantities listed above as an alternate option. If the Vendor requires INPRS to purchase other licenses to fulfill the proposed solution, those costs must be included in Appendix F – Fee Proposal.

Integrations - MuleSoft is the Integration Platform of Choice

- INPRS has selected MuleSoft for all integrations

- APIs will either be written natively within MuleSoft or be gatewayed within MuleSoft.

- Integration APIs will either be developed by INPRS or another third-party under a separate contract.

INPRS

Customizations / Upgradeability

- INPRS has a strong desire to keep system customizations to a minimum, ideally less than 1% of unique Salesforce objects

- The proposed solution must retain as much compatibility to future Salesforce releases as possible

- Any customizations and/or modifications that could influence future compatibility must be approved in advance

- Vendor proposed solutions that do not meet this criteria will be identified as less than ideal

INPRS RFP 23-03 Salesforce CRM Implementation

Evaluation Criteria

Evaluation Criteria

1. Fulfilling the requirements set forth in the RFP

2. Technical knowledge, skills, and other competencies of the vendor

3. Respondent qualifications

4. Quality and completeness of responses to this RFP

5. Quality of references

6. Experience and track record

7. Price (i.e. detail of fee proposal)

8. Quality of finalist presentation, if selected

9. Additional qualifying factors, as determined relevant by INPRS

INPRS RFP 23-03 Salesforce CRM Implementation

Wrap Up