

Salesforce Consulting Services for Transportation Demand Management RFP: Questions and Answers

Q) What is the timetable for funding for project approved by GDOT?

A) ARC and GDOT are working to approve funding and enter into a funding agreement to access the funds. The timetable for the agreement to be in place is July 1, 2020.

Q) There is a reference to Exhibit D for a list of the types of TDM-specific information needed to be tracked to determine the level of engagement for each partner. The “engagement level” will need to be tracked and automatically calculated (scored we presume?) based on specific fields. How will the department want that scoring to be displayed (Contact/Account Objects, and/or Lists/Reports)?

A) Engagement Level should be displayed as field within the account object. The TDM-specific data is currently housed in a separate object that is related to the accounts. Account owners need to be able to edit and update TDM-specific fields as needed, which should automatically update the engagement level for the associated account.

Q) How are you currently segmenting the TMA’s from one another? Is this through Sales Cloud or are you doing this through Communities?

A) Currently, all TMAs have access to the same instance of Salesforce, but have differential access to data, so that nobody else can see information associated with the accounts they own unless they intentionally share it.

Q) Are you expecting that any Salesforce specific licensed product (those that are sold and distributed by Salesforce) be provisioned within this RFP through the firm selected?

A) ARC is not expecting for any Salesforce specific products to be used, but the consultant should feel free to propose the use of these products if they see fit.

Q) Do you want all the ESO's to access features through the Salesforce mobile app? Just to confirm, ESOs will be actual users within salesforce?

A) Salesforce mobile app is not a requirement of this contract, but ARC is open to considering its use if the consultant proposes it.

Q) How are survey results captured and how do you envision them being uploaded into salesforce?

A) Surveys are captured digitally in a standardized format. Currently, they are uploaded to Salesforce using a process that connects a filled-in, standardized survey csv file to a specific account using that account’s unique Salesforce id. Each unique survey object must be related to a specific account. The consultant should feel free to propose their own methodology for uploading survey results into Salesforce.

Q) Regarding training, how many are needing basic user training and admin users, and will these trainings be individualized or in groups? Also, the request was for onsite training, is that still a requirement under our current Covid-19 environment?

A) Basic training is done in groups and is usually needed once or twice a year, depending on how many new hires have been brought on since the previous training. Given the current Covid-19 work environment, we anticipate all trainings to be conducted virtually until further notice. There will only be one or two administrators at ARC. These admin users will be the direct point of contact for the consultant and do not require formal trainings. Rather, they should be informed and updated on Salesforce workflows, functionality, structure, and reporting on an ongoing basis.

Q) Regarding support services, it appears that you want a help desk available for users who run into issues with the platform. What is the expected response time or availability of a support agent be required (immediate live phone support vs. email or ticketed support requests with 1 business day response)?

A) The current system of support involves a ticketed support request system with an average response time of one to two business days. The consultant should feel free to propose any support service structure that they prefer.

Q) The stated budget for this project is \$113,000 (for the intended contract period). Does this budget include both licenses and the related Salesforce consulting services?

A) The budget of \$113,000 includes the budget for both licenses and related Salesforce consulting services through December 31st 2021.

Q) How many users are there within the GCO and each of the seven TMAs? What is the total number of TDM users across the shared CRM account?

A) Currently, across ARC, GCO, and the seven TMAs, we have 3 admin licenses, 49 standard plus users, 8 read only users, and 2 report only users.

Q) Will ARC consider proposals from out-of-state Salesforce integrators?

A) Yes, ARC will consider proposals from out-of-state Salesforce integrators.

Q) Will ARC consider waiving the hard copy submission requirement?

A) Unfortunately, ARC is unable to waive the hard copy submission requirement. However, as long as firms send their proposal via USPS with a tracking number by June 26th, they can simply send the tracking information to Casey Sloan (csloan@atlantaregional.org) as proof of this submittal along with their submitted digital copy.

Q) Will ARC consider proposals from DBEs certified by entities besides ARC and/or outside of Georgia? If yes, are DBE primes required to submit DBE Utilization Plans?

A) DBEs must be certified in the State of Georgia either by GDOT or MARTA.

Q) How many employer partners will use the system? Are they all licensed on Salesforce?

A) Employer partners will not be using the ARC Salesforce platform. This is reserved for ARC employees and sub-contractors.

Q) Is a customer community in use?

A) No, a customer community is not currently in use. The consultant should feel free to propose the use of a customer community they consider it to be applicable.

Q) What is the event registration process? Will that be done through Salesforce or another platform?

A) The Atlanta Regional TDM Program does not currently use Salesforce for event registration. The process and software used for event registration varies by each organization working within the program.

Q) How many surveys will be uploaded annually?

A) There is no set amount of surveys to be uploaded annually, but we can expect anywhere between 100 and 500 surveys uploaded annually.

Q) Is information about employer and property manager partners manually entered or uploaded?

A) Information about the Atlanta Regional TDM Program's employer and property manager partners and their commute options programs is manually entered by the TMAs and GCO (the account owners). Survey responses are uploaded.

Q) Will employer partners need to see reports and dashboards, or just see the data they uploaded?

A) Employer and property manager partners do not have access to the Atlanta Regional TDM Program's Salesforce instance. This access is reserved for ARC, GCO, and TMA employees who work within the program. These program employees, however, will need access to reports and dashboards in addition to the data they upload.

Q) Is an integration with Agile Mile expected? How many data elements would need to be queried / updated? Does a web service exist for Agile Mile? If so what type (REST / SOAP)?

A) An integration with Agile Mile is desired, so consultants should propose an approach to making this connection if they have the capabilities. Currently, there is no set number of data elements that need to be queried. The most important thing is making a connection between the companies that are accounts in Salesforce and the companies that our Agile Mile users work for. Agile Mile has a REST API and also consumes services through a REST API.

Q) Are there any additional funds for incremental enhancements?

A) The stated budget should cover incremental enhancements.

Q) Can international bidders take part in this project?

A) Companies from outside the USA may apply; however, the nature of the work would be difficult for a firm to conduct from outside this region.