

Salesforce Consulting Services for Transportation Demand Management RFP:

Questions & Answers

1. Are we showing all commute options irrespective of account types or is it based on preferences? Are these preferences received only from surveys or is data received from external systems too?

The fields related to an organization's commute options program will be specific to the account type (e.g., employer vs property manager).

2. Please elaborate if the ARC uses any Analytics Tool for Advance reporting and analysis?

ARC does not currently use any additional Salesforce apps for analysis or advanced reporting.

3. Is Agile methodology being followed for delivery? If not, which methodology would be preferred?

ARC has no specific preference for delivery methodology. This will be left to the vendor's discretion as to what type of development and delivery methodology to propose.

4. If Agile methodology is to be followed, do we have a setup/tool for Sprint management? If not, is the vendor expected to propose relevant options available in the market?

See above (Question 3)

5. Please elaborate of the ARC uses any AppExchange Products linked to Service Cloud?

ARC currently utilizes a TDM-specific application developed and made available by OneCommute, who also handles any specific custom development needed by ARC.

6. List of all applications (Salesforce and Third Party) installed currently in Salesforce org?

See above (Question 5)

7. Any new applications planned for the new Atlanta Regional TDM Program Salesforce platform?

Not currently but the vendor is welcome to propose applications for use in the future.

8. What is the size of ARC's current in-house team for Salesforce Platform development services work?

ARC has one dedicated staff member who handles all Salesforce related issues.

9. Does ARC have a list of all automation (workflows, process builders and/or flows) needing to be configured within their new instance to share for scope estimation?

ARC does not currently have a definite list of all automation needed for configuration under the new system. ARC will work with the consultant on this under Task 1: Needs Assessment and Plan Development to develop such a list.

10. Are vendors allowed to bid on specific portions of the RFP or is a full response addressing all Tasks required with the ARC having the ability to select a vendor for each task?

Vendors are not allowed to bid on specific tasks only. They must bid on the entire contract. Sub-contractors should be used by the vendor if they lack expertise in a particular area.

11. As mentioned in the RFP the available budget is Approx. \$100,000. Is this fixed or any chance for escalation?

No, \$100,000 is the ceiling on the budget for this project.

12. Are the business processes for each group (GCO and 6 different TMAs) the same or is discovery and design needed for each group separately?

GCO and each of the six TMAs will be using the exact same system, but privacy measures will be put in place to allow each organization access to only it's accounts and related info.

13. Can you explain the business process behind current Salesforce implementation?

This and related issues will be discussed with the selected vendor under Task 1: Needs Assessment and Plan Development.

14. Please elaborate if ARC uses Classic or Lightning version? If you are on classic - are you planning or have you started conversion of Classic components to their Lightning Alternatives?

ARC currently uses Lightning.

15. What Edition of Salesforce is currently used by Atlanta Regional TDM?

See above (Question 14)

16. Do you have communities implemented? Is it for Partners or Customers?

No, ARC does not have communities implemented for its TDM Program Salesforce instance.

17. How many Partners/End Users access the partner community/customer community through their own login?

See above (Question 16)

18. What do the Partners/customers/end users use the community for? e.g. create Lead, raise tech support issues etc.

See above (Question 16)

19. Is your community heavily customized i.e. has heavy UI/UX customizations?

See above (Question 16)

20. Can vendors be exempted from the DBE participation goals recommended for this project?

It is ARC's policy to ensure that DBE's have an equal opportunity to receive and participate in DOT-assisted contracts. As a recipient of federal financial assistance, ARC has established a DBE Program that meets USDOT regulations. There are no exemptions from DBE requirements on DOT funded projects.

21. Is it necessary to have a DBE participation as a contractor or subcontractor?

The ARC DBE participation goal is 17.61%. This is an overall agency goal. Lack of DBE participation does not deem a proposal non-responsive.

22. Page No:3 of the RFP mentions about the DBE goals by ARC ad 17.61%. Is this goal only for this opportunity or the overall goal of ARC for the fiscal year 2022-23?

17.61% is the overall goal for the agency. ARC does not use project specific contract goals.

23. Can you please clarify if the DBE must be certified by GA DOT or from any certifying agency which is out of state of Georgia?

DBE must be certified as a DBE in the state of Georgia.

24. Can you please help us with a directory of GA based DBE's or provide any web link?

UCP Directory: <https://gdotbiext.dot.ga.gov/ext-bi/saw.dll?dashboard>

25. If the VOSB is certified from any agency in the state of Georgia, can we have that firm as our subcontractor to meet the DBE goals?

They must be certified through GDOT or MARTA.

26. If we are unable to identify a qualified DBE at the time of submission of our response, can we provide that info at the time of execution of the contract?

Yes. If the information is not provided by the time of contracting, participation will not count towards the agency goal.

27. Can vendors provide latest financial statements or audited financial statements upon the notice of award?

No. Per the RFP submittal requirements, the firm's latest financial statements or audited statements are to be submitted as part of the proposal.

28. Does ARC have a local firm preference for the purpose of services described under the scope of this RFP?

No.

29. RFP page #13 (debarment certification), 14 (contractor affidavit),15(contractor/vendor information) must be notarized and submitted along with our response?

Yes

30. For references will the email address suffice as contact information?

Contact information should be provided as requested on page 2 of the RFP.

31. Is US citizenship required for staff working on the project? Can a US-based company leverage offshore resources (or non-US citizens) for this engagement?

Companies from outside the USA may submit proposals to this RFP

32. Can the project be completed with a combination of resources Onsite and offshore (India)?

Yes, companies from outside the USA may submit proposals to this RFP.

33. Can ARC please elaborate if vendors can provide services can be provided from their offshore (non-US) offices?

Companies from outside the USA may submit proposals to this RFP.

34. How is ARC currently managing the Salesforce consulting and development services for the Atlanta Regional Transportation Demand Management (TDM) Program, particularly the development of custom objects and fields, workflows, and privacy settings. Outsourced/ in-house team?

ARC currently utilizes a TDM-specific application developed and made available by OneCommute, who also handles any specific custom development needed by ARC.

35. Could the ARC please elaborate if they have an incumbent currently providing the services under the scope of the RFP?

ARC currently utilizes a TDM-specific application developed and made available by OneCommute, who also handles any specific custom development needed by ARC.

36. Is there currently an incumbent company, who has a similar contract performing these services?

ARC currently utilizes a TDM-specific application developed and made available by OneCommute, who also handles any specific custom development needed by ARC.

37. If so - can you please provide incumbent name, contract number, dollar value and period of performance?

Current provider is Celwell/OneCommute. Contract number is UP2045. Dollar value is \$190,390.00. Period of Performance is August 2020-December 2022.

38. Are you satisfied with incumbent performance?

ARC is satisfied with the incumbent's performance but has decided to bring its TDM Salesforce platform in-house and so no longer requires access to the specific Salesforce application offered through OneCommute.

39. Roughly how many custom objects are being leveraged within Atlanta's TDM Instance?

Although the vendor that ARC is currently using for TDM-specific Salesforce consulting has many custom objects, ARC uses approximately 10 or so on a regular basis.

40. Any custom development work performed till date?

ARC currently utilizes a TDM-specific application developed and made available by OneCommute, who also handles any specific custom development needed by ARC.

41. Please elaborate if ARC needs vendors to perform Data Cleanup/Deduplication as well? If yes please give details as well as approximate volumes?

The consultant may need to perform some data cleanup, but this will be fairly minimal and is not expected to be too heavy of a lift. ARC will work with the consultant on this under Task 1: Needs Assessment and Plan Development.

42. Is there a need for data migration from existing/legacy systems?

Yes, there will be a need to migrate data from the system currently being utilized by the TDM Program.

43. Is there a DevOps setup already in place? If not, is the selected vendor expected to propose best practices on the process and also to suggest tools for the same.

We don't currently see a need for DevOps but if the selected vendor thinks it is in our best interest, then we will consider it.

44. In Engagement Level, based on criteria, the commute option is calculated. What are the criteria's we are considering here?

The details for calculating engagement levels and creating workflows to do so will be discussed with the selected vendor during the work under Task 1: Needs Assessment and Plan Development.

45. Please elaborate on the ERP system currently in use by the ARC? Which data syncs from Salesforce to ERP & vice versa?

ARC does not currently use an ERP system.

46. For Events and Meetings, does ARC utilize a 3rd Party for the creation and management?

No.

47. Regarding Events and Meetings, are we referring to internal activities and events or town events which might cause traffic?

Internal events, such as meeting with an employer or holding a tabling event at an employer's worksite.

48. Is there a consideration to use Salesforce Experience Cloud?

If the vendor wishes to propose the use of Experience Cloud, ARC is open to considering it.

49. Is there a functional flow document/object model/diagram that can be shared with us that depicts how the current system works? If we could get a demo, that would be great!

Currently, there is no functional flow document to share, but developing one will fall under Task 1: Needs Assessment and Plan Development.

50. Will ARC know if the funds will be available prior to the RFP deadline?

Funds are currently available for this project. However, available funding is always subject to change.

51. Will ARC know and share the amount of funds being allocated prior to the RFP deadline?

The available funds for this project are \$100,000. However, available funding is always subject to change.

52. How is grant managed in the existing system?

The TDM Program does not use Salesforce for grant management.

53. Does the ARC wish to perform improvements in phases, focusing on a few modules first and then add more modules later? Or would you prefer to start improvements and enhancements together?

The process by which the desired Salesforce instance will be built out is left up to the consultant to propose. ARC simply desires that all agreed upon development be complete by January 1, 2023.

54. Which are highest priority areas which the ARC seeks to improve first?

The process by which the desired Salesforce instance will be built out is left up to the consultant to propose. ARC simply desires that all agreed upon development be complete by January 1, 2023.

55. Please elaborate of the Service Cloud has any integrations with Third Party systems?

We do not currently integrate with any third party systems, but the possibility of doing so will be discussed after a consultant has been selected.

56. Does ARC need vendor to provide Integration Service? If yes, can ARC please elaborate how the integrations are built using a Middleware(e.g. MuleSoft, Dell Boomi) or are they Point to Point REST/Soap API based?

ARC currently uses 3 other systems besides Salesforce for the TDM Program that we would like to explore integrating with Salesforce. These systems include: Agile Mile, which is our commuter-facing Ride Matching database; MailChimp, our mailing list database and customer communication tool; and Business Wise, a B2B lead and contact database and communication tool. We are not currently integrating these systems with Salesforce, but are interested in doing so and will further explore these integration with the selected contractor under Task 1: Needs Assessment and Plan Development.

57. How many integrations does CRM have?

See above (Question 56)

58. Which Integration(s) need improvements/enhancements?

See above (Question 56)

59. What third Party tools need to be integrated within the Salesforce instance?

See above (Question 56)

60. Under Task 1 Needs Assessment and Plan Development. – Review other systems. What additional systems or databases are being used by the Atlanta Regional TDM program for consideration? Do you have a list of these other functional areas or applications?

See above (Question 56)

61. What are the products, features and licenses being used including Salesforce and other systems?

See above (Question 56)

62. Do we have external systems to be integrated to the Salesforce org?

See above (Question 56)

63. In the case Interviews are conducted, will the interview be conducted in-person or via video conferencing?

Interviews can be conducted either way. This will be determined if and when it is decided that interviews will be necessary.

64. What types of salesforce licenses are planned for the new Atlanta Regional TDM Program Salesforce platform?

We will be utilizing standard license types in the new ARC TDM Salesforce platform, but the vendor should not include licensing in their proposal as this will be handled by ARC.

65. What Salesforce Platform license type does the TDM program have?

See above (Question 64)

66. Can you list all types of salesforce licenses currently available in your Salesforce account?

See above (Question 64)

67. Can we get a brief idea on the long-term vision that is to be achieved from this implementation?

The long-term vision is for the vendor to work with ARC to develop a Salesforce platform that meets the needs of our TDM Program, which largely consists of tracking progress with the employer and property managers that we work with to develop site-specific TDM programs and strategies. The finished work will be the proprietary software of ARC.

68. Is the new Proposed Platform to be developed on this existing salesforce instance or on an entirely new salesforce instance?

ARC has an organization-wide Salesforce instance, but this will essentially be the build-out of an entirely new instance specific to the TDM Program.

69. How many users are planned for the new Atlanta Regional TDM Program Salesforce platform?

There are currently 56 users, but this number fluctuates throughout the year depending on a number of factors. The consultant should expect between 50 and 60 individual licensed users, representing 8 different organizations. For each org, there should be at least a standard user and an admin profile. In addition, there will be a system admin profile for ARC. ARC desires privacy settings to be put in place so that users from each organization can only see their own accounts and related info, but can share with other organizations if they so desire.

70. How many users currently use the system? Also, Please elaborate if ARC wants to add any more Teams/Users in Salesforce? If Yes, Pls specify the number of users to be imported.

See above (Question 69)

71. How big is your Service Team? How many roles and profiles are configured?

See above (Question 69)

72. Please elaborate if your Service Representatives divided into different groups with different accesses to Sales Cloud? If yes, how many groups are there?

See above (Question 69)

73. How many different profiles are currently leveraged across the Atlanta TDM program?

See above (Question 69)

74. Do the GCO and 6 different TMAs utilize multiple profiles per organization or does each have a single profile?

See above (Question 69)

75. What's the total count of users in this program?

See above (Question 69)

76. How many users are present in the current Salesforce platform?

See above (Question 69)

77. Will there be other teams working on the same org/environment?

See above (Question 69)

78. Can you list and describe various user personas needed on the new salesforce platform?

See above (Question 69)

79. What are the different personas of users that would be using Salesforce platforms?

See above (Question 69)

80. Could the ARC please elaborate if they need vendor resources to work out of ARC's office / onsite location?

Some of the work tasks under this contract may require in-person meetings, but the majority of it can, and is expected to be, done remotely. The vendor will not be given office space to work out of ARC's offices.

81. Are there other Vendors who work on your Salesforce instances? Who resolves defect/builds enhancements on your existing Salesforce Instance currently? Will the Proposer need to work with other vendors as part of this proposal? Will there be any dependency for Knowledge Transfer etc. on the current Vendor?

The selected consultant will not be working with any other vendors on this contract.

82. Could we get some more information on how the organization helps employers to implement flexwork and telework options?

We work directly with employers and other organizations to help them establish flex work programs and prepare for a remote workforce.

83. How does the incentive scheme work for commuters?

Incentives are not handled through Salesforce.

84. On what basis are we showing alternative commuting modes in mode counts?

Mode counts are collected through surveys and/or a variety of other methods.

85. How are the routes of different commuters matched as of now? Is it matched based on the start and destination locations being the same or does it also consider commuters who would drop someplace on the same route?

Route Matching is not done in Salesforce. It is handled through a separate ride matching system called Agile Mile. Integration with this system will be discussed under Task 1 once the vendor is selected.

86. How are tax benefits given to Employers?

The program helps employers, among other things, understand the tax benefits available to them, but we do not actually provide them with tax benefits.

87. Are there any transport vendors involved in the commute program or is it only meant for private vehicles?

The program does work with a number of transportation and transit agencies in the region.

88. Is there any vehicle tracking mechanism also in place or in scope for future implementation? If it is already in place, how is the tracking information being received by Salesforce?

No, we are not tracking vehicles.

89. Can vendor team work from an onshore (within US) location in a remote setting?

Some of the work tasks under this contract may require in-person meetings, but the majority of it can, and is expected to be, done remotely.

90. Does any task within the RFP require an onsite presence or can all tasks be completed virtually?

See above (Question 89)

91. Can the work done remotely or in-person?

See above (Question 89)

92. Please elaborate if the ARC is looking to build new reports and dashboards in Salesforce? Can you share an approximate number?

Yes, ARC will be interested in building a number of reports and dashboards, but there is no approximate number at this time. ARC will work with the consultant on developing a list of desired reports and dashboards under Task 1: Needs Assessment and Plan Development.

93. Is there a requirement for Salesforce certification?

ARC does not require Salesforce certification for vendors putting in a proposal.

94. Please elaborate the Salesforce modules used by the Atlanta Regional Commission (ARC) - Sales Cloud, Service Cloud , Experience Cloud(Communities), Marketing Cloud / Pardot.

For the TDM Program, ARC is currently using Sales Cloud.

95. What is the deployment pipeline followed as of now in terms of Salesforce sandboxes?

A sandbox will be created for this project in order to test and create before final deployment. ARC has sandbox licenses, so a sandbox can be created for the selected vendor.

96. Is scratch org utilized for development?

The current plan is to use a Sandbox development, but using a scratch org may be considered, depending on the time and cost.

97. Please elaborate which service channels do your customers use to create cases e.g. Web, Call Center, Chat, Social Media etc?

ARC does not use Salesforce to respond to customer questions and problems. For the TDM Program, Salesforce is used to track our outreach progress at employer and property manager sites, including updates to these organizations' TDM Programs.

98. Do you have SLA's for cases? If Yes, what type of SLAs are used?

See above (Question 97)

99. Do you have Case milestones defined for e.g. first response within 8 hours, resolution within 24 hours etc?

See above (Question 97)

100. Do you assign cases using Territory or Assignment Rules?

See above (Question 97)

101. Which processes have customizations for e.g. Triggers, custom Lightning pages?

See above (Question 97)

102. Please elaborate the kind of support offered to your customers 24*7, 8*5 etc?

See above (Question 97)

103. Which areas need improvements/enhancements in Service Cloud?

ARC is not currently using Service Cloud for the TDM Program's Salesforce instance.

104. Based on feedback received on the website, are we having any service cloud to maintain customer support for the same?

See above (Question 103)

105. ARC has indicated that they need vendors to provide support and maintenance through the end of the contract on June 30, 2023. Could the ARC please share the nature of support and maintenance services and their SLAs.

The support and maintenance will consist of troubleshooting any questions or issues that users might run into while using the newly developed system.

106. How many hours does ARC envision needing for support/maintenance services over the 6 month period?

There is no set number of hours that ARC envisions being needed for support and maintenance. This is up to the vendor to propose.

107. Does ARC utilize a Survey tool that is integrated within Salesforce?

Currently, ARC does not directly integrate a survey tool with Salesforce, but we are open to that option should the consultant propose it.

108. Are we using survey form details for commute options or for any other analysis?

Yes, survey form details are currently used to populate an account's mode share.

109. Please elaborate if ARC plans use any Tools for Deployments e.g. Copado? How many instances would we need to deploy code/configurations?

ARC does not plan to use any Tools for Deployment, but if the selected vendor thinks it is in our best interest then we will consider it.

110. For system training, can the training be held as one individual large group or do each of the 7 groups (GCO and 6 TMA's) each require their own training sessions? Is ARC open to a "train the trainer" approach where the selected vendor would train select ARC staff who would train additional internal staff as needed?

Trainings are typically held in one large group. We are open to the train the trainer approach should the vendor propose such an approach.

111. Can you share examples of existing documentation and/or training materials?

The approach to training materials and documents will be left up to the vendor to propose, but ARC will work with the consultant on this under Task 1: Needs Assessment and Plan Development to develop such a list.

112. The RFP does not list any user stories. We need a high level user story document in order to effectively estimate what level of effort is needed to develop them?

This and related issues will be discussed with the selected vendor under Task 1: Needs Assessment and Plan Development.

113. How many resources does ARC envision to be on Vendor's project team?

The number of individuals working on this contract under the vendor's team is left up to the consultants to propose.

114. What is the business need behind designing a new system for the Atlanta Regional TDM Program that is not achievable with the current system?

This and related issues will be discussed with the selected vendor under Task 1: Needs Assessment and Plan Development.

115. In RFP it's mentioned that "Currently, the Atlanta Regional TDM Program contracts with a Salesforce consultant who provides licensing and access to their TDM-specific Salesforce platform, with TDM-specific functionality and application". Will the same vendor involved with this engagement? What would be the role of current Salesforce consultant?

No, the current vendor will not be tasked to work with the newly selected consultant.