CRISP Salesforce Strategic Consultant Vendor Follow-Up Questions

Updated March 14, 2017

1. When will Contracting occur?
   1. Contracting will happen after the decision is made in April
2. Is this a full time position?
   1. At first, during discovery, yes. Over a longer time, this could simply be an advisory role part-time.
3. How many Salesforce users are there?
   1. Full Salesforce license - 90
   2. Community Users - 20,000
4. Is there a defined champion for these efforts?
   1. Michael Berger
5. Who is the decision-maker regarding cost/benefit of enhancements, vision, etc.?
   1. There is a Committee within CRISP that will be making this decision.
6. Will you be looking for an advisor to drive a top-down analysis of opportunities or to respond to ad-hoc questions?
   1. Top down predominantly. Ad hoc as well, but only if escalation is needed after review by someone else.
7. What is the relationship with the Salesforce developers you are working with?
   1. They are Consultants, not in-house developers, and have been with us about 6 months.
   2. Any suggestions from the Salesforce Strategic Consultant would be implemented by them.
   3. As a note, some on the call indicated this RFP is less appealing to bid if there is not work for a team as well. Working with their own team adds a "multiplier effect".
8. Since the duration and number of hours are not defined, will you be purchasing based on hourly rates based on experience?
   1. Yes, we will be purchasing based on hourly rates.
9. Should we include pricing in our RFP response?
   1. Yes; please see Part D of Section 3: Proposal Content.
10. Should we assume there is no total price?
    1. Correct, just hourly rate is fine.
11. What is the driving factor for bringing in an strategic resource?
    1. CRISP has used Salesforce for 3-5 years, and any enhancements to its implementation have been driven internally. While the system works for what CRISP needs to accomplish, these features were added without any large consideration to a larger, unifying picture. Furthermore, the CRISP resources implementing these changes only have experience with Salesforce from CRISP; we do not bring to the table any high-level Salesforce design principals or experiences on which to fall back on. The strategic resource will bring Salesforce knowledge and experience to guide our implementation to be more effective for CRISP.
12. We are on the Power of Us Hub: Link [HERE](https://powerofus.force.com/_ui/core/userprofile/UserProfilePage?u=0058000000CZ2ApAAL&tab=My_Org)
13. Our Account Executive is Toby Quaranta
14. Can you name the consultant(s) you have worked with? Are they bidding on this project?
    1. We will not name the consultant we are working with at this time
15. HIPPA: I understand your current SF instance tracks medical providers and your recruitment and engagement with them and the other services you provide, but does it keep actual patient medical records? And what HIPPA requirements you are looking for in your vendor?
    1. No medical records are stored in our Salesforce instance. Vendors must be able to pass a general HIPAA compliance assessment as they will likely encounter health information throughout the course of the position. Any knowledge of or experience with HIPAA is useful if Salesforce is to integrate with other CRISP infrastructure.
16. How many records are stored within your SF instance? Of those how many are active? Would you be willing to share screen shots of your system’s record counts and any installed applications?
    1. Contacts - 111,000
    2. Accounts - 9,000
    3. Leads - 0
    4. Opportunities - 0
    5. Licenses
       1. CDS - 40,000
       2. DEA - 40,000
       3. Dentist - 5,000
       4. Nursing - 10,000
       5. Pharmacist - 20,000
       6. Physician - 45,000
       7. Podiatrist - 2,000
       8. Veterinarian - 3,000
    6. Delegator - 32,000
    7. Doc Halo Contact - 1,000
    8. ENS Recipient - 2,000
    9. Point of Contact - 3,000
    10. Prioritizing Account - 0
    11. Single Sign On Contact - 17,000
17. How many departments and employees do you expect to be engaged in this strategic discovery meetings?
    1. Most likely one from each of Operations, Outreach, someone from a higher-level strategic position, plus myself and Michael.
18. Who are the Customer Community Logins?
    1. Applicants in our online registration process
19. Are there other CRISP locations?
    1. Our only office space is in Columbia, MD. We serve the entire state of Maryland and members of the Outreach team will visit these practices regularly.
20. What is Salesforce used to track?
    1. Salesforce is used as a traditional CRM tool by the Outreach team, but is otherwise largely used to track user provisioning.
21. Would there be a PM on this engagement?
    1. We are not sure what the balance between this consultant and the PM would be, but we would have a PM available as necessary.
22. How long is this engagement?
    1. The length of this first engagement is not known at this time. The intention is for this position to be long-term, but this first engagement is an evaluation period to ensure there is a good fit on both sides.
23. Was there a previous RFP process?
    1. We recently concluded an RFP process to procure a Healthcare Provider Directory, opting not to continue with any of the solutions presented.