Salesforce Strategic Consultant

*Request for Proposal*

RFP Issue Date: March 9, 2017

Proposals Due: March 23, 2017

Chesapeake Regional Information System for our Patients

7160 Columbia Gateway Drive, Suite 230

Columbia, Maryland 21046

# Contents

[1. Overview and Objective 3](#_Toc476723362)

[CRISP Overview and Background 3](#_Toc476723363)

[Engagement Objective 3](#_Toc476723364)

[Vendor Qualifications 3](#_Toc476723365)

[Scope of Work 3](#_Toc476723366)

[2. RFP Process and Submission Instructions 4](#_Toc476723367)

[Contract Type 4](#_Toc476723368)

[RFP Process Overview 5](#_Toc476723369)

[i. RFP Timeline 5](#_Toc476723370)

[ii. Bidders Conference and Requests for Clarification 5](#_Toc476723371)

[Terms and Conditions and Confidentiality 6](#_Toc476723372)

[Submission Instructions 6](#_Toc476723373)

[Proposal Evaluation 6](#_Toc476723374)

[3. Proposal Content 7](#_Toc476723375)

[A. Summary 7](#_Toc476723376)

[B. Company Overview 7](#_Toc476723377)

[C. General and Technical Questions Responses 8](#_Toc476723378)

[D. Finances 8](#_Toc476723379)

# Overview and Objective

## CRISP Overview and Background

Chesapeake Regional Information System for Our Patients, Inc. (CRISP) is an independent not-for-profit membership corporation that operates a health information exchange (HIE) serving the Maryland and District of Columbia region. CRISP, which is a private entity chartered and governed to pursue health IT projects best pursued cooperatively, is the state designated HIE for Maryland. Its participants include each of the 48 acute general care hospitals in Maryland, all eight hospitals in the District of Columbia, as well as numerous other facilities and providers of care.

CRISP leverages the Salesforce (SFDC) platform to manage many different aspects of its business. The Outreach team uses SFDC as a traditional selling tool, tracking Leads and working Opportunities, which are ultimately passed to the Operations team for account setup. The Operations team uses SFDC to manage system setup procedures and to track user account information. SFDC serves as a consolidated repository of all user access in downstream systems, and this record is maintained manually.

Force.com has enabled CRISP to automate portions of its [Onboarding](https://crisphealth.force.com/crisp2_login) and Audit practices. The Onboarding process walks new users step-by-step through CRISP’s requirements for access, while the Audit page is provided to each practice to periodically verify their users on file with CRISP.

## Engagement Objective

CRISP is seeking a vendor to evaluate our usage of SFDC and advise high-level strategic initiatives for improvement. The vendor will work with CRISP employees to understand current usage of the system, as well as a team of SFDC developers to implement any proposed changes. We anticipate this role is filled by a single resource, but are also open to a team of advisers if the case is made.

***This RFP is intended to evaluate the abilities of the selected vendor for potential future work.*** The scope of the engagement will be to enable CRISP to better understand our products, from when a customer first expresses interest in the product to when all new accounts have been established. CRISP lacks visibility into our customers’ interests in our products; this prevents us from effectively managing our Outreach team to focus on those most important or in-need-of-attention products.

## Vendor Qualifications

Key qualifications for a vendor include:

1. Proven success guiding SFDC implementations, with at least one deployed solution serving a related use case
2. Compliance with HIPAA and the Maryland Medical Records Act
3. Knowledge and experience working with existing CRISP business processes is preferred but not required
4. Able to meet the goals and deliverables of the project

## Scope of Work

The proposed scope of work is to enable CRISP to quickly identify system access for a user. Major project tasks and key deliverables are described in Figure 1.

**Figure 1: Tasks**

|  |  |  |
| --- | --- | --- |
| ***Task*** | ***Timeframe*** | ***Proposed Major Deliverables*** |
| **SFDC Architectural Review** | Within 14 Days of Contract Execution | The product should include a brief description of the status of CRISP’s Salesforce environment and any blockers to delivering our goal of quickly identifying system access for a user. |
| **Development of Detailed Implementation Plan** | April 2017 | The product should include a detailed description of the solution proposed and expected increments of delivery. |
| **Stakeholder Engagement** | Ongoing | The vendor will manage and support a robust process for communicating with stakeholders throughout the engagement. Deliverables will include meeting agendas, minutes, and timeline updates to the delivery of the Healthcare Directory. |
| **Post Development Support** | May 2017 | Vendor will be expected to train and transfer knowledge of maintenance and operation items to CRISP post warranty period. |
|  |  |  |
|  |  |  |
|  |  |  |

# 2. RFP Process and Submission Instructions

## Contract Type

CRISP will issue full contract specifications as part of the final procurement process as outlined in the RFP timeline below. Vendors are welcome to propose and justify other contract types if deemed appropriate.

## RFP Process Overview

This RFP requires vendors to set forth a plan for Salesforce Strategic Consulting. Based on responses, CRISP will select multiple vendors for in-person/webinar interviews and conduct reference reviews. Following the interviews, CRISP will issue refined specifications and ask selected vendors to provide a final response and financial bids.

CRISP expects to issue the final vendor award approximately two months after issuance of this RFP.

### RFP Timeline

Figure 2, the Procurement Timetable, represents CRISP’s best-estimated schedule for this procurement. All dates, including the contract start date are subject to change.

**Figure 2: Procurement Timetable**

|  |  |  |
| --- | --- | --- |
| **Event** | **Approximate Dates** | **Notes** |
| **CRISP Issues RFP** | March 9, 2017 | Any proposal updates will be issues on the CRISP website |
| **Clarifications and Q&A** | Ongoing | Ongoing, posted on CRISP website  Questions may be submitted to Seth.Sacher@crisphealth.org |
| **Vendor RFP Responses Due to CRISP** | March 23, 2017 | Proposals must be emailed by 5 pm |
| **Follow-Up with Vendors** | March 28, 2017 | CRISP will contact vendors as needed |
| **Vendor Selection and Contracting** | April 2017 | CRISP will contact selected bidders to initiate contracting process |
| **Contract Execution** | April 2017 | Contract will begin upon execution |

CRISP will work in good faith to provide adequate and equal opportunity for all participating vendors. However, CRISP reserves the right to adjust or modify the Procurement Timetable at any point, as deemed necessary, in the process.

### ii. Bidders Conference and Requests for Clarification

CRISP will hold a bidder’s conference on **March 14, 2017 at 1pm ET**.

In addition, CRISP will routinely answer and post to our website questions and answers related to this procurement. It is assumed that all Q&A will be finalized by **March 23, 2017**. Please email questions and requests for clarification to: Seth Sacher [Seth.Sacher@crisphealth.org](mailto:Seth.Sacher@crisphealth.org).

## Terms and Conditions and Confidentiality

All responses become the property of CRISP and will not be returned to responders. Responses may be disclosed to CRISP and CRISP advisors as deemed appropriate by CRISP. All pricing information will be treated confidentially.

CRISP expressly reserves the right to make any decision regarding future direction or future technology partners. This includes the right to not award a contact pursuant to this RFI/RFP process. CRISP also reserves the right to:

* Accept or reject any and all proposals or parts of proposals received in response to this RFP
* Amend or modify the RFI/RFP or cancel this request, with or without the substitution of another RFI/RFP
* Waive or modify any information, irregularity, or inconsistency in proposals received
* Request additional information from any or all respondents
* Follow up on any references provided
* Negotiate any terms of contract or costs for any proposal
* Request modification to proposals from any or all contractors during review and negotiation
* Negotiate any aspect of the proposal with any individual or firm and negotiate with multiple individuals or firms at the same time

Submission of a proposal in response to this RFP constitutes acceptance of all the conditions of this procurement process described here and elsewhere in the RFP.

A bidder receiving a positive response to their RFP proposal should be prepared to immediately begin negotiation of final terms based on the RFP and other mutually agreed-to terms and conditions, provided that terms described by bidder in their response may be rejected in whole or in part and/or otherwise negotiated by CRISP in the contracting process. In addition, a positive response from CRISP does not assure that a contract will be entered into; CRISP may discontinue negotiations with a bidder at any time, at our sole discretion. Until and unless a formal contract is executed by CRISP and responder, CRISP shall have no liability or other legal obligation to a responder whatsoever, relating to or arising from this RFP, the RFP process, or any decisions regarding pursuit of a formal solicitation.

CRISP will hold responses as confidential.

In no event will CRISP be responsible for damages or other remedies, at law or in equity, arising directly or indirectly from any decisions or any actions taken or not taken in response to or as a result of this RFP or response by a vendor. All responder’s costs from response preparation, response delivery, and any negotiation will be borne by the responder.

## Submission Instructions

Responses to this RFP should be submitted by **March 23th, 2017 no later than 5 pm (EST)** to **Seth Sacher** at **Seth.Sacher@crisphealth.org****.** Vendors should submit the proposal as a single file containing all response and supporting materials.

## Proposal Evaluation

Proposals will be evaluated based on:

* Vendor meeting minimum qualifications of at least one deployed solution;
* A preliminary examination to determine completeness of the response;
* An evaluation of the capabilities of the Salesforce Strategic Consultant, including previous project successes;
* Reference review;
* Review of estimated price in the finances section.

# 3. Proposal Content

The technical proposal provides CRISP with an understanding of your company, proposed resource or team, and your work plan. Resumes for the proposed resource and team should be included in appendices and do not count towards page limit.

***CRISP does not expect a solution or work plan to our engagement objective, “to enable CRISP to better understand our products,” as a part of this RFP response. Additional details for this specific project will be communicated directly to any down-selected vendors by CRISP resources to permit for adequate Q&A to respond.***

## A. Summary

Provide a summary of the proposal including company overview and proposed resource or team (1 page)

## B. Company Overview

In this section, provide a company overview including the proposed resource or team and a description of similar projects client references. This section should describe the experience and qualifications of the individual team members to be assigned to this project. Resumes should be attached as an appendix and do not count towards the page limit. The vendor should provide two customers for reference (use table format in Figure 3). References should be for customers with requirements similar to those described in this RFP. CRISP will provide vendors notice before contacting any references.

**Figure 3: Client References**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Client Company Name & Industry*** | ***Client Contact Name*** | ***Client Phone and/or e-mail*** | ***Implementation Date*** | ***Approximate Cost of Engagement*** |
| 1. |  |  |  |  |
| 2. |  |  |  |  |

## C. General and Technical Questions Responses

CRISP requests responses to all questions listed below, and all answers should be clearly provided within the context of the proposal and/or in their own separate section. All answers provided should be succinct in length to ease reviewer evaluation, while providing sufficient depth to answer each question thoroughly.

CRISP will assume that any non-answer will indicate that any proposed company or technology will be unable to provide or unwilling to disclose a solution to the question, and this may negatively impact CRISP’s perception of the overall proposal. Inability to provide a response to any question will not immediately disqualify a proposal from consideration.

**Please NOTE: All responses, assertions, and commitments made in this proposal will be part of the contract.**

1. Please detail a previous engagement in which your strategic guidance was able to identify previous unexplored areas for improvement and tangibly impact your customer’s efficiency or bottom line.
2. What is your typical process for requirements gathering? What is a typical design session?
3. What is your experience working with a team within your organization, within your customer’s organization, or with third-party consultants? Which is your preferred method for successful project implementation?
4. Why is your company uniquely suited to advise CRISP on Salesforce improvements and implementation? Why is the resource recommended in this RFP the best fit for CRISP?

## D. Finances

**Hourly Rates**

The vendor should provide hourly billing rates for junior, mid-level, and senior resources.

**Expenses**

The vendor should also provide an estimate of expenses associated with the project including estimated trips and travel expenses.

**CRISP resources**

The vendor should describe the CRISP resources, by role, they expect to need to be successful along with the estimated time commitment for each.

**Other CRISP borne costs**

If the solution requires additional systems or capabilities not included in the vendor’s proposal, those should be delineated in the final tab of the spreadsheet in any form you find suitable. For example, the vendor’s solution requires 1 SQL Server license; with the expectation that CRISP will purchase the license.