12/15/2023

**RE: Responses to Vendor Inquiries for the 3CE Salesforce CRM RFP**

Hello vendors,

Thank you for submitting questions and showing interest in the Salesforce CRM RFP for 3CE. Below are the answers to the questions submitted:

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| **Questions** | **Answers** |
| **Can you confirm if 3CE has already, or intends to, purchase a Salesforce environment and Service Cloud licenses to facilitate some of the items within the Enhanced CRM section like “efficiency resolution of customer issues”, service trends and customer satisfaction metrics”, and “Channel Journey Analytics and Optimization”?** | 3CE is currently leveraging a Salesforce solution via a third-party vendor on FORCE.COM. We are evaluating options to enhance this existing setup or considering the procurement of a new Salesforce environment tailored to our specific needs. |
| **Will 3CE consider third-party developed Salesforce solutions (commonly referred to as an ISV reseller managed package solution) that can be combined with Service Cloud and configured according to 3CE’s needs. Or is 3CE only looking to leverage Service Cloud and configure that application only?** | We are open to exploring a range of solutions, including both third-party Salesforce solutions and the exclusive use of Service Cloud, based on our operational requirements. |
| **How many energy programs are managed by 3rd party contractors? Can a list, or the names of those programs be provided?** | Currently, the oversight of our energy programs is internally conducted, with the engagement of third-party contractors for specialized enhancements in forms and Salesforce integration. |
| **What level of analytics and program support is needed? Any detail you can provide would be helpful.** | We require an analytics and reporting framework, particularly focusing on key and member agency accounts. Our intention is to employ our existing data warehouse with Tableau for reporting functionalities and therefore would require less innate salesforce reporting. |
| **What is the level of ongoing system support expected?** | We anticipate ongoing system support, primarily aimed at resolving any system malfunctions that may occur. We do want to have in house expertise for the on-going support and only rely on external vendor assistance for the more complex issues. |
| **What type and number of marketing campaigns do you anticipate, or is marketing limited to mass mailers only?** | Our marketing initiatives are subject to seasonal fluctuations. We seek a flexible solution that supports the deployment and customization of various campaigns by our internal team. |
| **What is the source(s) of data and how much historical data will be imported?** | Our Azure-based data warehouse is the repository for all customer-related data, which we require to be seamlessly integrated into Salesforce at regular intervals. |
| **What kinds and number of reports are the expected to be developed? Are you looking for the ability to create your own reports or would you need us to develop some reports for you?** | While we are open to exploring standard reporting features, our primary focus is on integrating Salesforce data into our data warehouse for tailored report development. |
| **What is the expected solution delivery date?** | The timeline for solution delivery is contingent on the proposed solution. Our target is to achieve a production-ready instance within a maximum of 6 months from the contract initiation. |
| **What data feeds will need to be developed?** | Our primary requirement is a robust integration system between our Azure-based data warehouse and Salesforce. |
| **What interoperability requirements are there for existing platform(s) e.g., billing?** | Our data warehouse comprehensively contains all billing and invoice data. We are seeking a solution capable of automatically extracting this information into Salesforce via an API. |
| **What APIs need to be developed?** | The primary API requirement is for a seamless data feed from our Azure-based Data warehouse into Salesforce. |
| **Can you provide structure and different type of accounts in your database?** | All accounts in our database follow a uniform structure. We will provide detailed column structure post the selection of a solution. |
| **Are all Account data to be synced with Salesforce in Data Warehouse or is there additional data source for accounts?** | Our data warehouse encompasses all necessary account data. However, the implementation phase may require a reassessment of our current Salesforce solution, including the potential migration of energy program information and unique customer service notes stored in Salesforce. |
| **In the current state, are relationships maintained at the principal account level only or are relationships maintained at the principal account (parent) and related accounts (child)?** | Presently, relationships are maintained at both the principal and related account levels. However, to ensure comprehensive visibility, we prefer a solution that organizes all relationships under the principal account. |
| **Per this statement "Consolidating Multiple Accounts into a Principal account.." Is this due to duplicates being created or is surrounding changing the account structure per the Advanced Hierarchy use case?** | The request to consolidate multiple accounts under a principal account primarily aims to enhance visibility, allowing customer relationship information at the sub-account level to be accessible at the parent level. |
| **Can you describe structure of Customer Service team to access Salesforce? (number of managers, support agents)** | Our customer service operations are predominantly outsourced. Our internal team is primarily focused on managing escalated customer requests. |
| **What are channels available for support? We have identified Email, Contact Us form, phone number from website.** | Our support channels include Email, the 'Contact Us' form, and phone support as identified. |
| **Do you need implementation of SLAs monitoring in CRM? (i.e time for first answer to ticket created, resolution time...)** | We are open to considering the implementation of SLA monitoring if it demonstrates tangible business value. |
| **Is support provided only in English? If multiple language supported how are request routed to correct agent between English and other languages?** | Our current support system does not differentiate by language. However, we are interested in incorporating this functionality in the proposed solution. |
| **2 email addresses for support exists: NorthSupport@3CE.org and SouthSupport@3CE.org. Are both email address requests routed to unique team or do you have assigned team for each address?** | Both email addresses are managed by our third-party vendor. The distinction primarily caters to the different service areas. |
| **Should telephony system be integrated with CRM? If yes can you provide list of phone numbers, IVR routing and structure of team assigned to phone requests?** | Our phone support is handled by a third-party vendor. Our requirement is limited to integrating contact information from our data warehouse into Salesforce. |
| **Is customer service team involved similarly between B2B clients and B2C clients?** | Our customer service team engages equivalently with both B2B and B2C clients. |
| **Should Live Chat functionality be implemented on existing website? If yes, are you managing internally changes on existing site or is it managed by external partner to involve in implementation process?** | We currently do not utilize live chat on our website, but are interested in exploring this feature. |
| **Should integration with Social Media be included in CRM scope? If yes can you provide list of social media to be included?** | We are open to assessing the advantages of integrating social media into our CRM. Our presence includes Facebook, Instagram, LinkedIn, and Twitter. |
| **Should Knowledge database for internal users be included in Salesforce CRM for ticket resolution help? If yes, do you have existing content to be imported in Salesforce? How many articles?** | Our knowledge base is hosted on SharePoint. We do not anticipate the need for its integration within Salesforce. |
| **Can you provide estimation of number of accounts and master accounts to import in Salesforce?** | We estimate approximately 550K -600K accounts to be imported into Salesforce. |
| **Do you have preferred integration method between Salesforce and Warehouse? (API, ETL, Middleware)** | We have no specific preference for the integration method. Our data warehouse updates daily; hence we require a reliable solution that facilitates daily data uploads. |
| **Can you provide list of tables you would consider would be necessary to integrate between your data warehouse and Salesforce? (i.e Accounts, Products, Price catalogs etc)** | Our data warehouse includes tables related to customer information, invoices, usage, contact, and attributes. Exact naming conventions are confidential, but this provides an overview of the data structure. |
| **Should Salesforce send any information to Data warehouse or scope is limited to mono-directional integration from warehouse to CRM?** | We require Salesforce to send data back to the data warehouse for reporting purposes |
| **Can you provide number of forms that are currently created in formstack and will need to capture information in Salesforce?** | We have approximately 10-15 programs requiring annual form edits. The current process necessitates annual form recreation, and we seek a more efficient solution for the future. |
| **Do you currently have mass mailing marketing system? If yes, please answer the following: system name, subscriber list size, monthly send volume, number of emails per day/week.** | Our system currently includes mass mailing capabilities. To our understanding, it is an embedded app within Force.com. Our volumes range depending on the campaign. Our total email pool is approx. 550K, but we would rarely send a mass email to all customers. |
| **If yes, can you provide use case already in place for marketing tool?** | Our marketing use cases include promoting energy programs and targeting potential customers who are not currently enrolled in our services. |
| **Do you have a master file of subscribers or will we need to import in segments?** | We possess a comprehensive list of customers in our data warehouse that will require migration into Salesforce. Additionally, Salesforce holds significant data pertaining to our energy programs and customer interactions that will also necessitate migration into any new solution we adopt. |
| **How are opt-in/opt-out currently managed in existing system? Do you have preference center in place?** | At present, we manage email opt-outs but do not have a preference center. |
| **Do you have an in-house team to create email templates, or do you need partner to support email design and/or build?** | Our in-house team is responsible for creating email templates. The new solution should enable our internal teams to continue this practice effectively. |
| **Please give us details of the emails that need to be sent from Marketing Cloud using data from the integration (account created, post-purchase etc)** | Our primary email communications are promotional in nature, focusing on our various energy programs. |
| **How many domains do you plan to send from?** | All our email communications are dispatched from a single domain. (3ce.ORG) |
| **Do you currently send any Transactional emails - like Outage Alerts, Billing information from Mailing Systems, and is sending Transactional emails a future requirement from Marketing Cloud?** | We currently send a limited number of transactional emails, as most are managed by the primary utility. However, this is not a primary requirement for our Marketing Cloud integration. |
| **Do you do business in more than 1 State/Region. Is there a requirement to have more than one Business Unit in Marketing Cloud - like Residential BU or Commercial BU, or BU by State?** | Our services are currently limited to various customer classes within California, and we have no immediate plans to expand beyond state borders as we are a governmental agency established by various local governments withing California |
| **Do you communicate with customers via SMS today; and if so, for what use cases?** | Limited customer communication is conducted via SMS, primarily for promotional purposes. |
| **What is the source of truth for Email preferences as of today?** | Our primary reference for email preferences is based on customers who have not opted out of our email communications. |
| **Is there custom segmentation of customers happening today in the Mailing System, or is that a manual process where Segments are created outside of the Mailing system; and imported for emails?** | Customer segmentation is currently executed through filters within Salesforce, which is then integrated into our mass mailing system. |
| **How do you measure Marketing KPIs today like Engagement Metrics - Sends, Opens, Bounces etc. Is there a tool you are using for that Analysis?** | We utilize limited capabilities provided by our mass mailer to track email engagement metrics like open and success rates. |
| **In the current state are you using a GIS software today, i.e., ESRI?** | We do not utilize any GIS software currently. However, we do have basic mapping capabilities through Tableau. |
| **Do you plan on using any enhanced mapping features to work with GIS data that is brought the CRM? i.e., Salesforce Maps?** | We intend to utilize our data warehouse and Tableau for any visualization and reporting needs, rather than integrating enhanced mapping features into the CRM. |
| **Can you provide overview of price structure per Accounts? Do you manage one price catalog per client or is price managed in generic price catalog?** | Our pricing is based on electric rates, varying by the unit of energy depending on the customer’s rate. This information is sourced from our data warehouse, eliminating the need for Salesforce to calculate pricing. |
| **Please describe price catalog structure (number of SKUs, number of different price catalogs)** | As our prices are determined by electric rates and vary based on the customer’s rate class, the data warehouse supplies all necessary information, and Salesforce does not require a pricing calculation mechanism. |
| **Which system are you using as pricing source of truth and prices update?** | All invoice data for our customers is provided by our data warehouse, which serves as the pricing source of truth. Salesforce is not utilized for generating invoices. |
| **In the current state, if not currently using, does 3CE plan on moving to UAE Cloud (program management Data Model is Native) or is it expect to build out the a similar data model to accommodate the program management elements within Sales and Service Cloud (Core)?** | We lack sufficient knowledge to determine the best approach between UAE Cloud and a similar data model within Sales and Service Cloud. We expect guidance from the selected vendor in this area. |
| **As it relates to enrolling into a program, does 3CE plan to offer this as a self-service portal that is behind authentication, where customers can apply and enroll into the different programs and also securing upload required documents for approval process?** | Currently, our program forms are accessible without any authentication layer. We are open to considering the benefits of a more secure, authenticated portal for program applications. |
| **Do you currently have BI tool that need to be integrated with CRM?** | Yes, we have Tableau Cloud integrated with our data warehouse and are seeking direct integration between Salesforce and our data warehouse. |
| **Can you provide example of expected metrics to be tracked in CRM?** | Metrics of interest include electric usage by principal accounts, number of interactions per customer, total billed amount per customer, and energy program enrollment statistics. |
| **Will Salesforce be used by Sales Team to generate quotes in PDF?** | No, Salesforce will not be used for generating quotes in PDF format. We do not have sales team in the conventional sense. Our team are primarily customer service based and therefore not quotes are generated |
| **Do you have sales teams working organized by geography, product suite, vertical?** | Our teams are divided geographically into North and South regions, primarily due to servicing different IOUs. |
| **Do you have the same process followed across the teams?** | Yes, our processes are uniform across all teams. |
| **Do you need CRM to work on mobile device?** | While we are open to understanding the benefits of mobile CRM functionality, it is not a critical requirement in our request. |
| **Should quote created in Salesforce by Sales Team be synced with Data Warehouse?** | As we do not generate quotes, there is no need for such synchronization. |
| **How many Sales Cloud users are going to use the Salesforce CRM platform by role? Please include growth projections for next 24 months, if available.** | The total number of users will not exceed 40, as we are a small organization with no anticipated growth beyond 10 additional members in the next two years. |
| **What type of profiles will access Salesforce? (i.e Sales, Marketing etc)** | Profiles accessing Salesforce will include Marketing, Billing-related, Energy Programs, and data related. |
| **Do you have identity provider to be configured with Salesforce for Single Sign On (SSO) for user access?** | Our current Salesforce solution is enabled with Single Sign-On (SSO). |
| **Can you provide segmentation between number of users in Sales team and Customer service team expected in Salesforce?** | All our members are part of either the Customer Service team or the Energy Programs team. |
| **Can you provide the details of the existing data warehouse? a) What technology is it built on? b) What is the schema of the data warehouse (tables/objects, fields, their relations)? c) Can we have a short video / screenshots of the data warehouse? d) How is 3CE currently using this data warehouse?** | Our current data warehouse is based on Azure cloud technology and encompasses various tables including customer attributes, invoices, usage data, contact information, and rate details. We use this warehouse for various customer insights dashboards. Specific schema details cannot be shared. |
| **What is the existing CRM you need to transition to Salesforce? Is this the same “data warehouse” mentioned in the RFP?** | Our existing CRM is a FORCE.COM-based solution integrated with a mass mailer for outbound campaigns and Formstack for customer form submissions. |
| **What are the departments utilizing the CRM platform?** | The CRM platform is utilized by our Customer and Outreach (C&O) and Energy Programs departments. |
| **Please provide the details of the “current operations” that the Salesforce solution should reflect and maintain its continuity.** | Salesforce currently serves as the primary tool for managing customer interactions and overseeing our energy programs. |
| **Can you provide more details on the expected integration capabilities with the existing data warehouse?** | We require seamless and daily integration between the data warehouse and Salesforce. |
| **What are the energy programs that are implemented by 3rd party contractors?** | The management of energy programs is primarily an internal function, with third-party contractors involved in specific tasks. |
| **Do you already have any Formstacks and/or GIS systems you need the Salesforce to be integrated to? Please share the details.** | Formstack is currently integrated with Salesforce, and this integration will need to be maintained in the new solution. |
| **Please provide more details on this requirement: “Customizable Energy Programs: Enable in-house customization of energy programs, from form creation to defining program elements. “** | We need the capability for our internal staff to create and manage application forms for various energy programs, including managing program funds and applicants. |
| **Do you already have a mass mailer system that Salesforce should be integrated with? If yes please provide the details.** | Our current Salesforce solution is integrated with a mass mailer, which facilitates bulk communications to selected customer groups. |
| **Are there any specific Salesforce modules or features that 3CE is particularly interested in?** | We are open to any modules that effectively address the core requirements of the RFP. |
| **What are the current technical limitations of 3CE's CRM system that you aim to overcome with Salesforce?** | Currently, significant effort is required in data integration from our billing system into Salesforce and in mapping new programs from Formstack into the Salesforce schema. We aim to streamline these processes in the new solution. |
| **Which spatial analysis tools are used?** | None. |
| **Is there a preferred approach or technology stack for the integration of spatial analysis tools?** | We are aiming to use our data warehouse with Tableau for any of our reporting and visualization needs. |
| **What is the expected timeline for the implementation of the Salesforce CRM?** | The anticipated delivery date will be a key consideration in evaluating proposals, with a production-ready instance to be developed in no more than 6 months from the initiation of the contract. |
| **Are there any key milestones or phases in the project that vendors should be aware of?** | None at the moment. |
| **Is there a budget range that 3CE has allocated for this project?** | We are open to viewing the various solutions and the proposed pricing by the various members. The selected vendor and pricing will be subject to board approval. |
| **How many users are needed to be trained by us?** | Approximately 40 team members will require training on the new system. |
| **How critical is the factor of having references from public utility companies or energy sector clients in selecting an awardee?** | Not critical, but highly desired. |

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