

Question	CGB Answer
How many vendors have expressed interest in participating in this RFP?	More than 6
Have resources been set aside for this project, and if so, what is the targeted monthly amount?	Yes, we have budget, we don't share during RFP process
Are the requirements for vendor selection weighted, and if so, are you able to share the breakdown? For example: 30% Required Qualifications, 20% Preferred Qualifications, 10% Proposal Process, 40% Proposal Format.	Not weighted
How does a potential investment enter the pipeline?	Projects are entered into Salesforce by users (including admins) and through our Contractor Community.
What objects are created for the potential investment, and how many fields are currently tracked?	Accounts, Contacts, Opportunities, Leads, Reports, Campaigns, Dashboards, Cases. We also have a number of custom Objects, such as Projects, Sites, Solar Incentives, Funds, Transactions.
How many users does Green Bank have in its Salesforce instance, and what departments/functions are they from?	25-30 internal users; Project Management, Finance, Marketing, Operations. We also have external/Community users
What, if any, external stakeholders interact with Green Bank's Salesforce instance?	Our existing MS vendor. Also contractors who submit projects through our Community platform.
Has Green Bank worked with other vendors on its Salesforce instance in the past?	Yes
What employees of Green Bank will participate in the weekly check-in call?	The Admins and a select group of users
Does Green Bank have an existing team for managing its Salesforce instance, and what will their involvement look like going forward?	Yes, they participate in weekly calls and will work more closely on the specific projects as they arise
Does Green Bank have a budget allocated to enhancements for its Salesforce instance?	Yes, when we identify significant enhancements needed we make funding available
Is Green Bank looking for a vendor who can provide qualified consultants to address the evolving Salesforce application needs and the program will be managed by Green Bank?	We are looking for a vendor who can address our evolving SF needs.
Is there an incumbent providing services similar to the scope of this RFP to Green Bank?	Yes.

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What is the expected volume of work annually?	Our current vendor provides 40 hours per month. We will likely need 40 hours per month for the remainder of the year and will reassess hours then.
Can you provide the ticket volume for the last 12 months that would help us in sizing this opportunity?	Around 20-25 tickets/month--we recently built two new portals and a screenflow application
Can this be delivered remotely outside USA?	Yes
What are the other 3rd party systems in addition to Pardot that are integrated with Salesforce CRM that falls in scope of this RFP?	Zapier, Form Assembly, DocuSign
We are a Salesforce platinum partner and have succeeded in delivering Salesforce projects through the On-Demand Services model that is curated to deliver customer success. Is Green Bank open to such innovative delivery models?	Yes, please include a description of the model in your proposal
What is the expected contract duration for this RFP?	One year contracts over the next 3 years, when another RFP would be done.
We believe "SAMPLE STANDARD PROFESSIONAL SERVICES AGREEMENT" should be signed only by the qualified vendor during the contract signing stage and is not required for submission during the proposal process. Please confirm.	Correct.
Should we submit the "STATE OF CONNECTICUT CAMPAIGN CONTRIBUTION CERTIFICATION" even if there is no contribution and during the proposal submission stage?	No, submission not needed until we enter into the PSA.
<b>Please advise if you have preferred SLA for this engagement. If so, please provide details.</b>	<b>Open to what you think works best. Right now we pay a set amount each month for a certain amount of support.</b>
<b>Are you open to the Consultants working within USA (outside Connecticut state) and travel for meetings/Trainings as required? If yes, how many days per month approximately expected at Green Bank office?</b>	<b>Yes. No requirements to be in Green Bank office.</b>
<b>Are you open for Hybrid Model with mix of USA based Consultants &amp; India based Consultants where one of USA based Consultants will be the point of contact?</b>	<b>Yes.</b>

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1. Which Clouds is the Connecticut Green Bank currently utilizing? (e.g. Sales, Service)?	Service Cloud, Experience Cloud, Sales Cloud, Pardot
2. Is Pardot already implemented and configured within Green Bank's Salesforce instance?	Yes, but it does not work as needed, and we are looking for support to help with that.
4. What is Green Bank staff's Salesforce experience?	8 years of experience for the admins, all other users experience varies between new user and 7 years experience
5. Can you describe the makeup of the Green Bank's Salesforce team (admins/users)? How many should we plan on for training purposes?	We have between 25-30 internal users and two who are users/admins. Everyone should be trained.
6. Does Green Bank have documentation from the original implementation that the selected team could review?	We do not.
7. Do you have an existing vendor providing support? Can you share the current support load (average week or month)? And do you have expectations for what that support load may look like moving forward?	Yes. They provide us with about 40 hours of service per month. That will likely not decrease.
8. Can you provide guidance as to your budgeted support on an annual basis? We have several ways to model our support offerings and a realistic understanding of the budget will help us provide the solution that offers the most value.	We don't provide budget numbers during the RFP process.
9. Under Scope of Services, one of the items listed is "provide system enhancement options... with cost estimates." Is the expectation that these enhancements if Green Bank elects to implement them would be covered under this support agreement or that these would be contracted outside of this agreement?	If they were not able to be covered under the Managed Support hours in this agreement, we would add the new scope and additional funding to the PSA.
What is Green Bank's current version of Salesforce?	Enterprise
Please list all Salesforce subscriptions (and related tools) to enable proposers to gain a better understanding of Green Bank's current state.	Service Cloud, Experience Cloud, Sales Cloud, Pardot
Please list AppExchange products being used.	Zapier, DocuSign, Form Assembly
Has Green Bank's existing solution been updated to "Lightning"?	Yes and the recent Experience Cloud deployment was done using Lightning Components.

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Please describe Green Bank's service level exceptions (i.e. response and resolution times by priority)	Currently we prioritize tickets from low, to medium, to high, to highest. We expect the highest to be done within the week, high and medium within 2-3 weeks and low within a month or more. We occasionally (allbeit seldomly) require immediate assistance during business hours (M-F 8-5) if an urgent matter comes up that prevents us from completeing time-sensitive, core business activities. We would need access to an individual's direct phone number and email for these occasions and cannot always rely on a weekly meeting.
Please provide a list/summary of enhancements completed within the last 6 months/1 year	New Expereince portal (ESS), 2 new custom objects (Funds & Transactions)
Can Green Bank provide an approximate volume of incidents/service tickets (reports, user admin, error analysis, etc.) submitted or expected per month	20-25 tickets per month.
List of enhancements planned for future (if available)	not available at this time
Are offshore resources permitted to be used as part of project teams?	Yes
When was Green Bank's last security or health check performed?	Current MS provider does these checks quarterly. The Green Bank has no critical items in need of addressing.
Can you please provide existing Salesforce technical stack being used currently - such as Salesforce Sales Cloud, Service Cloud, Mulesfot etc	Service Cloud, Sales Cloud, Experience Cloud, Pardot
What are support SLAs required by Green Bank ? What is support window expected ( 8X5, 16X5 or 24X5, 24X7 etc)?	Approxmiately 40 hours/month. Also, there are occasions where we may need immediate help during normal business hours (M-F, 8-5) outside of our weekly check-in calls. We need direct access to a project manager (by email or phone) when these urgent matters arrise, as they can prevent us from completeing time-sensitive work.

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Can you please describe high level processes that current Salesforce instance is supporting?	Screenflow applications, RDL - required document uploads. email alerts, tasks, workflows, process builder
What is overall configuration vs customization % split ? Is you system heavily customized ?	It's highly customized (more than 75%). While we're using many standard objects (Accounts, Contacts, Leads, Opportunities, Reports, Cases, Dashboards), we have just as many custom objects. We've also created hundreds of custom fields and record types within the standard objects. Almost 100% of the work that is custom in the Green Bank's instance has been done through declarative configuration. Very little code exists within the system. There is some complexity around Flow.
Is Green Bank looking for labor rates and respective roles in cost of services ?	Yes, for contractual purposes. Currently we pay a set monthly fee for support
Since RFP does not provide fixed scope and services in detail (Scope of integration, scope and no. of enhancements, support coverage and SLAs), can vendor provide labor rates for desired roles in cost of services?	Yes
What are major painpoints with current system/services that you want vendors to address in their services/offering?	We'd like to focus on strong communication between Green Bank and our vendor to ensure that things are built correctly. Smooth process around tickets and quick response time. Strong training skills. Our programs are complex, so it would be helpful to have the flexibility to work on updates live with the vendor (instead of trying to articulate complex changes in a ticket)
On the support hours, would 40 hours/month suffice all the requirements at CT Green Bank? Looking at the scope and the requirements in the RFP, it seemed to involve greater support efforts.	40 hours is an average, at times there may be more, at times less.

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<p>Can you please shed some light on what competencies are covered internally within your Salesforce team and what would be needed from us as consultants from your perspective?</p>	<p>We have 2 internal Admins that take care of the 'day-to-day' stuff- user maintenance, data management, field creations/edits, workflows, reporting, etc. that have 7-8 years of experience working in our platform and have a pretty high-level understanding of how it works. But since we're not full-time SF users, we don't always have the time or expertise to complete all tasks, especially more complicated/time consuming ones. Consultant would be used for these situations, plus helping to continue to improve the existing platform through SF updates/upgrades, offer trainings and technical assistance when needed, and help us to add new features (fields, reports, dashboards, objects, flows, processes, outside app integrations, etc etc).</p>
<p>Has there been any efforts to forecast the volume of work expected to support Salesforce this coming year? Is there any data on the number of cases and total support hours needs the last year or two?</p>	<p>About 20-25 tickets/mo, due to the creation of two new portals and a screenflow activation. We anticipate volume to remain at similar levels, or decrease slightly, unless there is a significant change in the scope of what SF currently does for us.</p>
<p>How many users does your Salesforce instance support?</p>	<p>25-30 internal users, as well as Community users for our C-PACE program</p>

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Will the requests for support under this contract be made through your primary admin, or will the selected vendor be responsible for handling all support requests from all users?	Users would usually go through admins
<ul style="list-style-type: none"> <li>• Ongoing management and support for the Green Bank’s Salesforce instance, as needed</li> </ul>	
o Creation of objects, fields, workflows, dashboards	
o Management of objects, fields, workflows, dashboards	
o Support for custom processes to support the business	
<b>How many support requests on these items do you see per week on average?</b>	Between 0-5
<ul style="list-style-type: none"> <li>• Weekly check-in call</li> </ul>	
<ul style="list-style-type: none"> <li>• Manage sandbox and production if needed</li> </ul>	
<ul style="list-style-type: none"> <li>• Integration into/from 3rd party systems (i.e., Pardot)</li> </ul>	
<b>Can I assume the scope is limited to support to ensure existing integrated systems are working properly, or will additional systems need to be integrated under this scope?</b>	Existing systems for now
<ul style="list-style-type: none"> <li>• Provide system enhancement options including pros and cons with cost estimates</li> </ul>	
<ul style="list-style-type: none"> <li>• Recommend security and access control improvements</li> </ul>	
<ul style="list-style-type: none"> <li>• Describe systems maintenance needs</li> </ul>	
<ul style="list-style-type: none"> <li>• Review disaster recovery configuration</li> </ul>	
<ul style="list-style-type: none"> <li>• Propose implementation plans as needed</li> </ul>	
<b>Are there currently any plans to implement new functionality in your Salesforce instance?</b>	We have ideas but not plans. Depending on the scope, those could be incorporated into the current scope or we can add to it via agreement amendments.