

Question	CT Green Bank Answer
Is there an estimated budget range or not-to-exceed contract value for this engagement?	We have budget allocated for this engagement but do not share specific amounts during the RFP process.
What is the expected annual spend or allocation between managed services and project work?	We currently operate on a set monthly fee for a defined number of support hours.
Is there an existing/incumbent Salesforce support vendor? If yes, what are the key challenges or gaps with the current vendor?	Yes, we are not able to share specific details, but we encourage vendors to describe how they approach communication, ticket responsiveness, and collaboration on complex builds in their proposals.
What level of transition support, documentation, and knowledge transfer will be provided by the existing vendor?	The selected vendor will have access to our internal admins and our documentation.
What is the expected split of effort between ongoing support vs Salesforce 2.0 transformation?	2:1, Ongoing support : Salesforce 2.0. The relative weighting will depend on project phase and timing.
Are there any target timelines or milestones for completion of Salesforce 2.0?	We have internal milestones but are not sharing specific timelines at this stage.
What is the approximate number of Salesforce users and licenses?	80
What is the current volume of data to be migrated/cleaned as part of Salesforce 2.0?	We are not able to provide specific data volumes at this time. SF 2.0 involves consolidating program data from siloed objects into a unified schema. Vendors should describe their experience with data migration and transformation in their proposals.
Are there any known high-priority pain points or critical issues in the current system?	No critical issues in the current system. Process improvements, Automations, and UI enhancements of program-specific project data are increasingly more difficult to manage.
Are all listed tools (Pardot, DocuSign, FormAssembly, Calendly, etc.) currently implemented or partially implemented?	Most tools are fully implemented.
Are there any additional legacy or external systems not listed that require integration?	No.
Does the agency have a preferred AI platform (Salesforce Einstein vs third-party tools)?	We have explored multiple AI platforms. We are open to recommendations.
Are there specific approved AI use cases already defined?	We operate under the State of Connecticut Policy AI-01 AI Responsible Use Framework.
Are there any specific state or organizational compliance requirements beyond standard Salesforce security practices?	As a quasi-public agency of the State of Connecticut, the Green Bank is subject to applicable state requirements including FOIA. We undergo periodic security health checks and support SOC-2 audit activities.
Are there any constraints or preferences regarding onshore vs offshore resource allocation for this engagement?	No.
Is there a requirement for US-based or Connecticut-based resources for certain roles?	No requirement. Connecticut-based vendors are given preference per the RFP
Are vendors expected to provide onsite/in-person support, and if so, what is the expected frequency and location?	No in-person requirement. All work may be delivered remotely.
Are there any roles that must be delivered onshore or onsite (e.g., stakeholder engagement, governance, training)?	No roles are required to be delivered onsite. We do ask vendors to accommodate the Green Bank's standard business hours (M-F 8-5 ET) for check-ins, trainings, etc.
Does the 10-page proposal limit include the cover page, table of contents, references, resumes, and appendices, or does the limit apply only to the proposal narrative?	The 10-page limit applies to the proposal narrative only. Supporting materials such as resumes, references, and appendices may be included separately.
Is Green Bank seeking a fixed monthly managed services model, a time-and-materials model, or a hybrid approach?	We are open to any model. Our current vendor operates on a fixed monthly fee for a set number of support hours, with additional scope funded separately. Please describe your proposed model and its advantages in your response.
Can Green Bank provide an estimate of expected monthly support demand?	Our current vendor provides approximately 40 hours of support per month. Ticket volume runs approximately 20–25 tickets per month.

Can Green Bank provide a high-level overview of the current Salesforce environment?	Our instance is highly customized with custom objects, fields, and automations. Standard fields are used widely as well.
Is there any existing architecture, data model, process, or system documentation available?	Our system documentation is limited. We won't be sharing our documentation through this RFP process.
Has the Salesforce 2.0 initiative already begun? What has been completed and what remains?	Yes, SF 2.0 is underway. We are taking a program-by-program approach and are more than halfway through the first program.
Has Green Bank defined a target-state Salesforce 2.0 architecture or future-state data model?	Yes. The target model consolidates siloed program data into a unified structure built around core shared objects.
What are the primary business objectives and success criteria for Salesforce 2.0?	The primary objective is to consolidate program data currently managed in siloed custom structures into a unified, scalable data model that supports cross-program reporting, reduces administrative overhead, and improves data quality and governance.
Does Green Bank anticipate consolidating all program data into shared objects, or will some programs require dedicated custom structures?	Consolidating into shared objects.
Should vendors include Salesforce 2.0 implementation costs within the initial proposal, or price assessment and roadmap activities separately?	Managed Services should be the primary scope. For Salesforce 2.0, please provide pricing for assessment and roadmap support separately.
Should vendors assume responsibility for data cleansing and migration, or will Green Bank provide cleansed data?	We anticipate a collaborative approach. Vendors should describe their recommended methodology for data cleansing, migration, and validation in their proposals.
Has Green Bank conducted a recent data quality assessment?	We have a high-level data quality dashboard that is reviewed monthly.
Does Green Bank intend to migrate all historical data into the SF 2.0 model, or will some be archived?	All project data will be migrated into the 2.0 model, historic and active.
Who will be responsible for migration validation, reconciliation, and business sign-off?	Green Bank internal staff will be responsible for business sign-off and validation. The selected vendor will be expected to support reconciliation and provide tooling or processes to facilitate review.
Can Green Bank provide an inventory of current Salesforce integrations?	DocuSign, FormAssembly, Eventbrite, Calendly, and Account Engagement (fka Pardot) are currently being used.
Are current integrations maintained internally or by the incumbent vendor?	Maintained collaboratively.
Are there any planned integrations or major system changes to be aware of?	Nothing outside of what is noted on the RFP currently.
Will Green Bank facilitate a formal knowledge transfer from the incumbent to the selected vendor?	The Green Bank will work with the chosen vendor and the incumbent to ensure the transition is as seamless as possible.
What are the most significant challenges Green Bank would like addressed in year one?	Proactive communication, responsive ticketing, collaboration on complex builds, effective user training, and progress on the Salesforce 2.0 project
Can Green Bank share historical managed services metrics from the past 12-24 months?	Vendors can expect 20-25 tickets per month
Does Green Bank require specific SLAs for incident response?	We currently prioritize tickets as low, medium, high, highest, and blocker. Blocker requires immediate action. Highest priority items should be resolved within days; high and medium within a week or 2; low priority items can be completed during periods of low volume.
Beyond SOC 2, are there any specific security, compliance, or governance requirements?	As a quasi-public agency of the State of Connecticut, the Green Bank is subject to state procurement and FOIA requirements.
What backup, disaster recovery, and data retention practices are currently in place?	We have OwnBackup for data recovery and retention purposes.
Does Green Bank maintain formal governance processes for enhancement intake and change control?	We have internal processes for ticket prioritization, weekly check-ins with our vendor, and an Environmental Management Plan.
What are the most significant reporting and cross-program visibility challenges?	Cross-program reporting has historically been limited by siloed data structures, which SF 2.0 is designed to address.
Has Green Bank identified specific AI or automation use cases to prioritize?	No specific AI use cases have been approved at this time. The Green Bank is currently exploring use cases, with AI-automated document ingestion being our highest priority. Vendors are welcome to include relevant recommendations in their proposals.
Are there upcoming business initiatives or program expansions that may impact Salesforce priorities?	The Salesforce 2.0 migration is the primary initiative.
Can Green Bank provide metrics on data volume and system complexity?	We are not able to provide specific record counts or storage figures at this time.

Please clarify the desired pricing format — Firm-Fixed-Price or labor-category-based hourly rates?	We are open to either model, with a preference for fixed monthly fee for a set number of hours.
Does Green Bank intend to award a Firm-Fixed-Price contract or a Time-and-Materials/Labor-Hour contract?	We are open to either model, with a preference for fixed monthly fee for a set number of hours.
Does Green Bank permit the use of subcontractors?	Only with the expressed written interest in doing so through the vendor's RFP response. Subcontracts will be required to go through the same vetting process as Vendors.
May offerors rely on subcontractor past performance and experience to satisfy the RFP's qualifications requirements?	No.
Will subcontractor references and past performance be evaluated equally to prime contractor references?	Yes.
Can a subcontractor be used to satisfy the preference for Connecticut-based companies?	No.
Can Green Bank clarify what "Managed Services" means in this context?	Managed Services refers to ongoing, subscription-style support for our Salesforce instance rather than one-time project work. This includes day-to-day administration support, creation and management of objects, fields, workflows, flows, and dashboards, troubleshooting, user support, integrations maintenance, security and health check reviews, training, and proactive recommendations for platform improvements.
What specifically should be priced? Is there a detailed SOW or task breakdown available?	There is no SOW beyond the RFP. Vendors are free to submit an SOW based on the RFP to explain their managed services methodology and justify pricing.
Please provide details on the existing contract — contract number, value, duration, team size, and role-based staffing.	The Green Bank has been with our current vendor since our last RFP process in 2023. The Green Bank is currently engaged with Craftsman Technologies for Salesforce managed services.
Support Volume: What is the typical monthly volume of support tickets or enhancement requests the Green Bank anticipates for "Ongoing Salesforce Managed Services"?	Vendors can expect approximately 20–25 tickets per month across support and enhancement requests.
Staffing Levels: The RFP mentions working with "IT staff, Salesforce administrators, and program staff." How many internal Salesforce-focused staff members currently support the platform, and what will be the division of labor between internal staff and the contractor?	The Green Bank has internal admins who review tickets before being submitted, and two internal admins who support when needed. Internal admins handle day-to-day tasks, including but not limited to field creation, flow design, and user management. Vendors will be engaged for complex or time-consuming tasks.
AI Implementation: Regarding the "identification, adoption, and integration of AI tools," has the Green Bank already identified specific platforms or use cases beyond document collection and data entry?	No specific AI use cases have been approved at this time. AI-automated document ingestion is our highest priority area of exploration. The Green Bank operates under the State of Connecticut Policy AI-01 AI Responsible Use Framework. Vendors are welcome to include relevant recommendations in their proposals.
User and License Count: How many Salesforce users and what types of licenses (e.g., Sales Cloud, Service Cloud, Communities) are currently active across the various programs like C-PACE and Energy Storage Solutions (ESS)?	Approximately 80 total users. License types include Sales Cloud, Service Cloud, and Experience Cloud. External Community users support programs including C-PACE and ESS.
Integration Complexity: For the third-party integrations mentioned (e.g., Marketing Cloud Account Engagement, DocuSign, FormAssembly), are these already active, or is the contractor expected to perform new implementations?	Most integrations are fully implemented and active. Vendors are expected to support in maintenance and enhancements if needed.
System Health: Does the Green Bank have a current assessment of its "technical debt" or "data quality concerns," or is the contractor expected to perform a baseline audit as part of the initial engagement?	We maintain a high-level data quality dashboard that is reviewed monthly. A more formal baseline audit as part of onboarding would be welcome and vendors should describe their approach to this in their proposals.
Project Roadmap: Is there a predefined timeline or deadline for the completion of the "Salesforce 2.0" data reorganization effort?	We have internal milestones but are not sharing specific timelines at this stage.

Migration Scale: What is the approximate volume of data (records and objects) that will need to be migrated or rationalized from legacy program-specific structures to the unified model?	We are not able to provide specific record counts at this time. SF 2.0 involves consolidating program data from siloed objects into a unified schema. Vendors are welcome to describe their experience with data migration and transformation in their proposals.
Discovery Status: Has the "data model design" and "object rationalization" already begun, or will the contractor be starting this from scratch?	SF 2.0 is underway. A target-state data model has been defined and we are taking a program-by-program migration approach, currently more than halfway through the first program.
Release Management: Does the Green Bank currently use specific DevOps tools for "testing, deployment planning, and release support," or should the contractor propose a new methodology?	The Green Bank does not currently use a formal DevOps tool stack. We currently rely on our managed services vendor for our DevOp needs.
Meeting Cadence: The RFP mentions "regular check-in calls." Does the Green Bank have a preferred frequency for these (e.g., daily stand-ups, weekly status updates)?	Weekly check-in calls are our current standard and preferred cadence
Documentation Standards: Are there existing naming conventions and documentation standards in place, or is the contractor expected to develop these as part of "Salesforce governance"?	Our system documentation is limited. Developing governance standards including naming conventions is an area where we welcome vendor input and recommendations.
Budgetary Guidance: Does the Green Bank have a "not-to-exceed" budget range for the first twelve months of the contract?	We have budget allocated but do not share specific amounts during the RFP process.
Selection Weighting: How will the Green Bank weight the "preferred qualifications" (such as clean energy experience or being a Connecticut-based company) against the proposed "cost of services"?	Proposals are not formally weighted. The Green Bank evaluates all factors in its sole discretion per the RFP terms.
Evaluation Process: If the Green Bank decides to interview contractors, what is the anticipated timeframe for those interviews following the June 30th proposal deadline?	Shortlisted vendors will be contacted directly if an interview is deemed necessary in mid July.
Timeline: Would Green Bank be willing to extend the proposal due date?	No, assuming that the Green Bank receives adequate responses, there will be no extension to the deadline.
Resources: Are offshore resources allowed on this contract?	Yes, there are no constraints on offshore or hybrid delivery models.
Are vendors permitted to use staff located outside the United States for Salesforce administration, development, data migration, support, or AI/OCR-related work?	Yes. There are no restrictions on offshore or hybrid delivery models for any work under this engagement.
Are there data residency, background check, citizenship, or U.S.-only access requirements?	No specific data residency, citizenship, or background check requirements. As a quasi-public agency of the State of Connecticut, the Green Bank is subject to applicable state requirements including FOIA and SOC-2 audit activities.
Please provide approximate record counts, file/attachment volumes, Salesforce data/file storage usage, and key custom object volumes to support migration and managed services sizing.	We are not able to provide specific record counts or storage figures at this time. Vendors should describe their approach to environment assessment and sizing as part of their onboarding methodology.
Can Connecticut Green Bank provide current system architecture diagrams, Salesforce object/data model diagrams, integration diagrams, automation inventory, security model documentation, and environment/sandbox strategy documentation?	Our system documentation is limited and will not be shared during the RFP process. The selected vendor will have access to our internal admins.
What Salesforce 2.0 planning or design work has already been completed, what target-state decisions have been made, and what remaining work is expected of the selected vendor during the 12-month term?	We are taking a program-by-program approach and are more than halfway through the first program. The selected vendor will be expected to support continued migration, data reconciliation, and deployment across remaining programs during the 12-month term.
For each current or planned integration, please identify the system, business owner, integration method, data flow direction, frequency, and whether the selected vendor is expected to maintain, rebuild, or advise on it.	Current integrations include DocuSign, FormAssembly, Eventbrite, Calendly, and Marketing Cloud Account Engagement (formerly Pardot). All are currently active. The selected vendor is expected to maintain existing integrations and advise on improvements. No rebuilds are currently planned.
What monthly ticket volume (please provide split by Level 1, Level 2, Level 3), enhancement volume, reporting volume, and production support volume should vendor assume?	Vendors can expect approximately 20–25 tickets per month across support, enhancements, and reporting. We currently prioritize tickets as low, medium, high, highest, and blocker, with a majority of tickets being categorized as medium or high.

What is the expected support coverage for CT Green Bank's Salesforce solution? Is there after-hours support expectations?	Standard coverage is during normal business hours (M–F, 8–5 ET). We may require immediate assistance during business hours for urgent issues. After-hours support is not expected on a routine basis.
Are there SLAs around response times, resolution targets for this engagement?	We currently prioritize tickets as low, medium, high, highest, and blocker. Blocker requires immediate action. Highest priority items should be resolved within days; high and medium within one to two weeks; low priority items can be completed during periods of lower volume. Vendors are encouraged to propose an SLA framework in their response.
Should vendors assume full execution of data extraction, transformation, deduplication, migration, validation, reconciliation, and cutover or advisory/support services only pertaining to migration of historical data?	We anticipate a collaborative approach. Green Bank internal staff will be responsible for business sign-off and validation.
What volume of historical data must be migrated versus archived?	All project data will be migrated into the SF 2.0 model. Nothing is currently planned for archival only.
Which AI/OCR use cases are highest priority, what tools are currently approved or prohibited, and should AI/OCR implementation be included in the base not-to-exceed price or separately scoped?	AI-automated document ingestion is our highest priority area of exploration. No specific tools have been approved or prohibited at this time. AI/OCR implementation should be scoped and priced separately from base managed services.
Does CT Green Bank have an expected annual budget for this scope of services?	We have budget allocated but do not share specific amounts during the RFP process.
Should the proposal price assume a fixed baseline managed services capacity plus separately scoped Salesforce 2.0 projects, or one blended not-to-exceed amount for all work?	Vendors should propose a fixed baseline for managed services as the primary scope, with Salesforce 2.0 assessment and roadmap support priced separately. Implementation work beyond the baseline will be funded via PSA amendment as scope is defined.
Is there an incumbent vendor supporting CT Green Bank's Salesforce solution?	Yes. The Green Bank has been engaged with Craftsman Technologies for Salesforce managed services since our last RFP process in 2023.
What is the current number of employees (internal and contractor) currently supporting CT Green Bank's Salesforce solution?	The Green Bank has 3 internal admins. The incumbent managed services vendor provides approximately 40 hours of support per month
Who are the primary users of the Salesforce Application and what is the volume of users?	Approximately 80 total users across Project Management, Finance, Marketing, and Operations. External Community users also access the platform to interact with programs including ESS and C-PACE.
Please define the expected annual volume of managed services work, including anticipated monthly hours, number of tickets, number of enhancement requests, and expected support cadence.	Our current vendor provides approximately 40 hours of support per month. Ticket volume averages 20–25 per month across support, enhancements, and reporting. Weekly check-in calls are our standard cadence.
Please define "Salesforce 2.0," including whether it is an approved initiative with defined business requirements, a discovery/assessment effort, or a full implementation and migration expected during the 12-month term.	Salesforce 2.0 is an approved, active initiative with a defined target-state data model. It is a full migration effort consolidating siloed program data into a unified schema built around core shared objects. It is not a discovery effort. Design decisions have already been made. The selected vendor will be expected to support continued migration and deployment across remaining programs during the contract term. Not all programs are expected to be fully migrated within the initial 12 months.
Please provide the current number of Salesforce users by license type, number of communities/Experience Cloud users, number of internal administrators, and approximate number of active business units using Salesforce.	Approximately 80 total internal users across Project Management, Finance, Marketing, and Operations. 3 internal administrators. External Community/Experience Cloud users support programs, including C-PACE and ESS. License types in use include Sales Cloud, Service Cloud, and Experience Cloud.
Please provide current counts for custom objects, fields, flows, validation rules, approval processes, Apex components, and integrations.	We are unable to provide a complete configuration inventory during the RFP process. Our instance is highly customized, more than 75% custom, with hundreds of custom fields, numerous flows, and multiple custom objects. Automation is almost entirely declarative with minimal Apex.
Please provide estimated data volumes for Salesforce 2.0 migration, including number of records by object, file/document volumes, historical data retention requirements, duplicate rates, and known data quality issues.	We are not able to provide specific record counts or file volumes at this time. All project data, historical and active, will be migrated into the SF 2.0 model. We maintain a high-level data quality dashboard reviewed monthly. Vendors should describe their approach to migration sizing, deduplication, and data quality assessment in their proposals.
Please clarify whether the vendor is expected to identify AI/OCR opportunities only, recommend tools, implement tools, integrate tools, or provide ongoing operational support for AI-automated processes.	The vendor is expected to identify opportunities, recommend tools, and support implementation and ongoing maintenance as part of managed services. AI-automated document ingestion is our highest priority area of exploration.

<p>Because the PSA period is 12 months, but the RFP asks for costs to complete “the project in its entirety,” should vendors assume all Salesforce 2.0 and enhancement work must be completed within the initial 12-month term?</p>	<p>No. The PSA is structured as one-year contracts renewable over a three-year period, at which point a new RFP would be conducted. Salesforce 2.0 work is expected to span beyond the initial term. Vendors should price managed services as the primary scope and the Salesforce 2.0 project as a separate scope.</p>
<p>Will the Salesforce contractor be responsible for coordinating with third-party vendors such as DocuSign, FormAssembly, Calendly, finance system providers, analytics providers, or document management vendors?</p>	<p>No. The selected vendor is expected to maintain existing integrations and advise on improvements.</p>
<p>What categories of sensitive data are stored in Salesforce, including financial, customer PII, contractor, incentive, tax, or compliance-related information, and what data handling or security standards apply?</p>	<p>Salesforce contains financial, contractor, incentive, and program-related data for Green Bank’s financing and incentive programs.</p>
<p>Please confirm how vendors should mark confidential, proprietary, and pricing information in the proposal, and whether Green Bank will notify the vendor before disclosing such information under a FOIA request.</p>	<p>All proposals submitted in response to this RFP are subject to disclosure under the Connecticut Freedom of Information Act. Respondents should expect that any submitted proposal may be released in its entirety in the event of a FOIA request. The Green Bank will make a reasonable effort to notify the respondent prior to disclosure, but has no obligation to do so. Respondents are encouraged to avoid including information in their proposals that they would not want disclosed publicly.</p>
<p>Please provide the evaluation criteria and relative weighting for technical approach, qualifications, cost, Connecticut presence, SOC 2, clean energy experience, nonprofit/public-sector experience, and diversity-related considerations.</p>	<p>Proposals are not formally weighted. The Green Bank evaluates all factors in its sole discretion per the RFP terms.</p>
<p>“What is the anticipated contract term and preferred pricing model (e.g., fixed price for a defined scope, fixed monthly hours, time and materials, another model) for each of the scope areas: 1) Ongoing Salesforce Managed Services and Support 2) Salesforce 2.0 Data Reorganization, Architecture, and Implementation Support 3) System Administration, Integrations, Security, Training, and Reporting”</p>	<p>The contract term is one year, renewable over a three-year period. The Green Bank prefers a fixed price for fixed monthly hours for all scope areas.</p>
<p>Are all support tiers (L1, L2, L3) within the scope of this engagement? If yes, how does Green Bank define the roles and responsibilities of each level?</p>	<p>We currently prioritize tickets as low, medium, high, highest, and blocker. Blocker requires immediate action. Highest priority items should be resolved within days; high and medium within a week or 2; low priority items can be completed during periods of low volume.</p>
<p>What support hours and availability are required for each level (e.g. 24x7 for L1/L2 and 8x5 for L3)? Please also confirm the primary support time zone (e.g. US Eastern Time).</p>	<p>Standard coverage is M–F, 8–5 ET. After-hours support is not expected on a routine basis. For blocker-level issues, direct phone and email access to a project manager is required during business hours. US Eastern Time is the primary time zone.</p>
<p>Onsite/Onshore Requirements: Is any on-site or U.S.-based (onshore) presence required for the support team? If yes, would near-shore resources (e.g. based in Canada or Mexico) be acceptable for meeting this requirement?</p>	<p>No onsite or U.S.-based presence is required. All work may be delivered remotely. Offshore, nearshore, and hybrid delivery models are all acceptable.</p>
<p>Please provide any available data on recent Salesforce support ticket volumes (e.g., average number of incidents and service requests per month over the last 6–12 months, and their breakdown by priority/severity). A ticket dump for the last 6-12 months would help.</p>	<p>We are not able to provide a ticket dump during the RFP process. Vendors can expect approximately 20–25 tickets per month across support, enhancements, and reporting.</p>
<p>If available, what is the approximate distribution of tickets by complexity (simple vs. medium vs. complex issues) in Green Bank’s environment?</p>	<p>We do not currently track tickets by complexity tier. Our internal admins handle routine day-to-day tasks independently. Tickets escalated to the vendor tend to skew toward medium and complex work: configuration, flow development, integrations, and custom object management.</p>
<p>Does Green Bank have any data on the average resolution time or typical time-to-resolve for tickets at each support level (L1, L2, L3), or by complexity category?</p>	<p>We do not currently track formal resolution time metrics. Our SLA expectations are: blocker = immediate; highest = within days; high and medium = within one to two weeks; low = during periods of lower volume.</p>

<p>What Service Level Agreements (SLAs) or key performance indicators (KPIs) will apply to this engagement (e.g., target response and resolution times for different priority tickets)? Are there existing SLAs/KPIs that the current team is measured against which the new contractor should maintain or improve?</p>	<p>We are not sharing our KPIs during the RFP Process. Vendors are encouraged to propose a KPI framework, including response times, resolution targets, and monthly reporting metrics in their response.</p>
<p>What reporting and metrics does Green Bank require from the selected contractor (e.g. monthly service reports, ticket trend analysis, annual summary of work and technical debt, etc.)?</p>	<p>At minimum, we expect a monthly summary on ticket volume, status, and topics discussed during weekly meetings. Vendors are encouraged to propose additional reporting and trend analysis capabilities.</p>
<p>Does Green Bank currently have a ticketing or intake system for Salesforce change requests (e.g., Jira, email, a Salesforce case queue)? How are priorities set today?</p>	<p>We currently manage tickets collaboratively between our internal admins and the incumbent vendor through the use of Jira. Priorities are set at ticket creation and can be changed at any time.</p>
<p>What are Green Bank's expectations for the contractor's involvement in Salesforce governance and release management (e.g., documentation standards, naming conventions, change control)? Can we assume we can follow Green Bank's existing processes or recommend new governance improvements as part of the service?</p>	<p>Vendors are encouraged to recommend and help implement governance improvements. Vendors are primarily responsible for release management with support from internal admins. Vendors are free to include their governance practices in their response.</p>
<p>Does Green Bank have a current Salesforce support arrangement? If so, when does it end and what is the expected transition plan for the new contractor? For example, will there be a required knowledge transfer/overlap period with the incumbent team or any specific transition support activities we should plan for?</p>	<p>Yes. The Green Bank is currently engaged with Craftsman Technologies. The Green Bank will work with the chosen vendor and the incumbent to ensure the transition is as seamless as possible. The selected vendor will have access to our internal admins throughout the transition.</p>
<p>Can Green Bank describe current challenges managing Salesforce today and/or any challenges with the current Salesforce managed services provider?</p>	<p>We are not able to share specific details about the current engagement. We encourage vendors to describe their approach to communication, ticket responsiveness, and collaboration on complex builds in their proposals.</p>
<p>Can Green Bank describe the current internal Salesforce administration and IT capacity, including the roles and responsibilities of internal administrators, business owners, IT staff, and program staff who will participate in prioritization, testing, deployment, and adoption?</p>	<p>We have internal admins who handle day-to-day tasks, including user maintenance, data management, field creation, workflows, and reporting. Program and finance staff participate in testing, prioritization, and user acceptance. The selected vendor handles more complex configuration, flow development, integration maintenance, training, and SF 2.0 migration support.</p>
<p>Dedicated vs Shared Team: Does Green Bank expect a fully dedicated support team for Green Bank's Salesforce platform, or would a shared team (supporting multiple clients with defined SLAs) be acceptable?</p>	<p>A shared team model is acceptable; the Green Bank has no requirements for the team engagement model.</p>
<p>Are there categories of work Green Bank expects to be handled primarily by internal staff versus the selected contractor?</p>	<p>Internal admins handle routine day-to-day administration. The contractor is expected to handle complex configuration, flow development, integrations maintenance, training delivery, SF 2.0 migration support, and proactive platform recommendations.</p>
<p>Which Salesforce clouds/products are currently active in Green Bank's org, and how many licenses are currently in use or anticipated during the course of this contract? (Sales Cloud, Service Cloud, Experience Cloud / Communities, Marketing Cloud Account Engagement / Pardot, Shield, etc.)</p>	<p>Sales Cloud, Service Cloud, Experience Cloud, and Marketing Cloud Account Engagement (formerly Pardot) are currently active. We are on Enterprise Edition. Approximately 80 internal users plus external Community/Experience Cloud users supporting programs including C-PACE and ESS.</p>
<p>Can Green Bank provide an overview of the current Salesforce feature landscape, including core functionality in use today, known capability gaps, requested enhancements, and areas currently handled through support or optimization efforts?</p>	<p>Our instance is highly customized with standard and custom objects, hundreds of custom fields, and declarative automation via Flow. Known areas for improvement include Marketing Cloud Account Engagement optimization, cross-program reporting, and SF 2.0 migration completion. Enhancement requests are managed through our weekly ticketing and check-in process.</p>
<p>Can Green Bank provide an inventory of current integrations, such as DocuSign, FormAssembly, Calendly, finance systems, analytics tools, document management tools, Marketing Cloud Account Engagement, or other platforms? For each integration, who owns support today, and what issues or enhancements are anticipated? Is it built on native connectors, a middleware/iPaaS tool (e.g., MuleSoft, Zapier, Workato), or custom API code?</p>	<p>Current integrations include DocuSign, FormAssembly, Eventbrite, Calendly, and Marketing Cloud Account Engagement. All are currently active and maintained collaboratively between our internal admins and the incumbent vendor. Integrations are built primarily on native connectors. No rebuilds are currently planned.</p>

