

**TSET Salesforce Implementation Q&A**  
**11/29/2023**

**1. Any ideas on how many users will be active in development?**

Answer: We anticipate an internal implementation team of 8 with 1 team lead representing each division (6) + 2 project managers.

**2. For the integrations, can you elaborate on how you would like each integration to work? For example, do you want all integrations to give real-time information? Would some integrations be on a schedule, such as nightly integration with PeopleSoft?**

Answer: Routinely scheduled integrations suffice for TSET's needs with this implementation.

**3. In #4, Deliverables, the state refers to a number of documents and templates. Please clarify how the state generates these documents. Is there a system currently in use that creates these documents, and would need to be integrated into the proposed implementation plan? Or do you need a new document generation solution to be part of the implementation plan proposed by the vendor?**

Answer: Currently, contracts are manually made using Microsoft Word or PDF, while grant reports are generated in Smartsheet. We plan to streamline our processes by inputting data into Salesforce forms, allowing us to produce reports and documents in Word, PDF, or Excel. Salesforce, which already includes Adobe Sign and DocuSign, can handle this without additional integrations. While integrating with Smartsheet is not necessary, we will consider it if included in a proposal.

**4. Clarifying Item #4 under Responsibilities related to Templates: Our approach to implementation is to set TSET up for success and continuous ownership of the platform. To do this we often develop templates for key items and walk the teams through processes for modifications and creation of additional assets from these templates. The approx. number of items called out in #4, are those what TSET is requiring the implementor develop OR is that the number of items that TSET would like to be able to scale to over time given the right tools and enablement?**

Answer: TSET specifies the number of items in #4 that our internal team aims to scale gradually over time, provided we have the right tools and enablement to facilitate this scaling process.

**5. Regarding forms and templates, are these available for review, or can you describe the forms? For example, how many fields are in each form? Are the forms similar in that half or more of the information collected on each is the same?**

Answer: Priority forms and templates for TSET include monthly and annual grant reports for approx. 15 types of grants. These will contain mostly the same information. Other priority documents include grant RFP's and submission packages, grant budget templates, reviewer data input forms, and reports that consolidate this information. These will be similar across grant types with half or more of the data collection fields being the same.

**6. Can you please confirm that the attached is the only document for the RFP?**

Answer: Yes, the OMESFormCP050\_FINAL is the only existing document for this RFP.

**7. Can you please confirm that the attached Statement of Work is only intended as your request for quote/proposals and the contract terms will be mutually agreed upon award?**

Answer: Yes, Statements of Work (SOWs) will be employed to evaluate the optimal vendor alignment with TSET's requirements. The terms of the contract will be refined and collaboratively agreed upon after the vendor selection is made.

**8. As a follow up to this question, can we leverage the State's SW1022C Contract between Carahsoft and State of Oklahoma?**

Answer: Yes, we will use existing statewide contracts whenever possible.

**9. Are we bound by the prices submitted on statewide contract?**

Answer: Yes.

**10. Does TSET allow for the use of offshore resources (typically Developers, QA etc.) This would be a blended approach with more strategic resources (Technical Arch, Project Manager) on shore.**

Answer: No, the state of Oklahoma requires utilized resources within U.S. Territories.

**11. #10 Under Deliverables for Data Cleansing, can we confirm that the expectation is for the vendor to provide the template and guidance on the data cleansing but that they will not lead in the actual execution?**

Answer: Yes, the expectation is that the implementation vendor provides the tools and direction for data cleansing and migration while our internal team executes the processes.

**12. The RFQ/SOW includes an anticipated timeline of 4 months for this project (2/1/24 - 5/31/24). If the scope included in the RFQ/SOW needs more time than 4 months for implementation, is state amenable to a phased approach which includes MVP (Minimum Viable Product) functionality to go-live with before 5/31/24, followed by incremental release that includes rest of the scope and functionality as prioritized by TSET?**

Answer: Yes, we are amenable to a phased approach to include MVP functionality with go-live by 5/31/2024 followed by incremental release to include remaining scope functionality. However, preference will be given to vendor(s) able to execute all requirements indicated in the RFQ/SOW by the go-live date.