REQUEST FOR INFORMATION

MICHIGAN ECONOMIC DEVELOPMENT CORPORATION

TO REPLACE SALESFORCE CUSTOMER PORTAL WITH A COMMUNITY

RFI-CASE-288020
A. Background

The Michigan Economic Development Corporation (MEDC) strives to expand overall economic growth by serving as Michigan’s lead entity for business, jobs, tourism, and more. The MEDC offers many programs to businesses that are needed to drive them to make investments and create jobs in Michigan. These dozens of programs include grants, loans, access to capital, and other economic assistance for businesses and communities. Many of the programs provided at the MEDC use our Salesforce Customer Portal. Customers perform a variety of activities on this portal including submission of project information, applications, compliance activities, and request of funds.

B. Purpose of the Request for Information

The MEDC is preparing to release a Request For Proposals (RFP) to design, develop and implement a Salesforce Community to replace our current Customer Portal which is written in Visualforce code. This Request For Information (RFI) is to select contractors to present initial written and in-person presentations to assist us with writing an RFP.

Over 300 MEDC internal staff use Salesforce to manage customer relations, monitor project pipelines, perform compliance activities for multiple programs, as well as a multitude of additional day to day activities. Our Customer Portal is used by over 2,000 external clients to interact with MEDC staff daily, with increased use during required reporting periods (i.e., annual mandated report submissions). Currently, 11 specific MEDC programs are managed on this portal. Please see Appendix A for an example of a current MEDC Program Process Flow.

The MEDC implemented Salesforce in April 2011, which included the Customer Portal. Our environment has been highly customized for our business processes and we utilize many custom objects. On the portal, we currently use 20+ custom objects to collect/display the data and many of those objects include multiple record types and page layouts. Data security is an extremely important part of our model that will need to be maintained in the new Community environment. The key features which are currently part of our portal that need to be migrated to the Community include:

- Foundation Pages: Landing, Sign-In, Log-out, Password Reset, Profile by User and Account, Additional Description/Landing pages
- Communications: Password/Email Templates
- Applications: 5 unique intake record types with associated approval processes
- Metrics: 19 unique intake record types across 11 Programs with various notifications and approval processes
- Milestones: 4 unique intake record types across 3 Programs with various notifications and approval processes
- Project Information: Large (over 200 fields) intake form, collects data across multiple Programs and includes process flows/logic dependent on data provided
- Sites: (Nonfinancial Projects related to an Account) 1 record type
- Incentives (Portions of Programs offered/awarded to businesses/communities): 9 unique record types to display data for all Programs
• Disbursement Schedules (DS), Requests (DR), Budgets (DRB): 2 unique DS and DR record types and 1 DRB with various notifications and approval processes
• Attachments: Ability of user to upload multiple attachments to a record
• Secure Data: User access to data based on associated Account record and one-off access based on Incentive record relationship, potentially other ways to grant access in future

Since Salesforce no longer offers their Customer Portal and their roadmap focuses on Lightning and Communities, we want to move in the same direction. Our internal MEDC staff successfully migrated from the Salesforce Classic interface to Lightning in December 2018 and now our effort is focused on the replacement of the portal with a Lightning Community. The primary goal of this project is to enhance the user experience of our external users which include businesses, communities, and local governments. We plan to do this by:

1. Improving our user interface to make it more intuitive and user-friendly while maintaining all the current functionality available on our portal and shown in the list of key features.
   ❖ The solution should be easy to use and promote adaption.
   ❖ The look and feel should reflect the MEDC’s business website at Michiganbusiness.org.
2. Improving our response time to internal staff requests related to the portal through optimization of our current business processes and code.
   ❖ As a precursor to development, the solution should include evaluating the current structure and processes.
   ❖ The solution should include code modifications that improve code quality and efficiency wherever possible.

THIS RFI IS SEEKING INFORMATION ONLY AND DOES NOT IMPLY, COMMIT, OR GUARANTEE FUNDING IN ANY MANNER NOW OR IN THE FUTURE TO ANY PARTY. THIS RFI IS NOT SEEKING BIDS FOR SERVICES AT THIS TIME.

ANY DOCUMENTS PRESENTED AS A PART OF THE RFI ARE SUBJECT TO DISCLOSURE UNDER THE FREEDOM OF INFORMATION ACT.

C. Request for Information Guidelines

All Questions AND Responses must be submitted via e-mail only to contractsandgrants@michigan.org as a single Portable Document Format (.pdf) attachment. Responses will not be accepted via U.S. mail or any other delivery method.

RESPONSES MUST INCLUDE THE FOLLOWING IDENTIFYING INFORMATION APPEARING IN THE SUBJECT LINE OF YOUR EMAIL:

“RFI-CASE-288020-[Your Organization’s Name] - Message X of 10”.
(X = number as appropriate, if the bid consists of multiple emails)

• March 13, 2020, at 3:00 p.m.: Questions regarding this Request for Information from potential Respondents are due. Please note: The MEDC will not respond to questions that are not received by the above date and time.
• **March 18, 2020, by close of business:** Answers to all qualifying questions will be posted on the MEDC's website, [https://www.michiganbusiness.org/288020](https://www.michiganbusiness.org/288020).

• **March 27, 2020, at 3:00pm:** RFI Responses are due, via email submission to contractsandgrants@michigan.org.

• **The MEDC will not respond to telephone inquiries, or visitation by Bidders or their representatives. Bidder’s sole point of contact concerning the RFI is below and any communication outside of this process may result in disqualification.**

• Responses can be a maximum of 10 pages, utilizing ten (10) point font or greater, submitted as a single .pdf file.

Any change or update to this RFI will be posted on the MEDC website. Such postings shall constitute constructive notice to the general public of any modifications or alterations of the RFI.

### D. Request for Information Response

Respondents are asked to respond to and provide information for the following items:

1. **Contact Information of the Respondent**
   a) Organization and business name and address.
   b) Name, title, email and phone number of the individual(s) responsible for the respondent’s RFI response.

2. **Background, Area of Expertise and Experience**

3. **Project**
   a) Describe approach to design, planning and development of the project.
   b) Include high-level timeline detailing design, planning, implementation and completion of project.
   c) Include recommendations for additional specifications to enhance the product.
   d) Training and Support, including documentation, to be provided to MEDC staff assuming support after implementation and end-users of product.

4. **Pricing Models for Services** – If available, include pricing option(s) using MEDC resources as part of the project (i.e., developer, business analyst). *Note: This is high-level estimated cost and hours to enable the MEDC to budget accordingly and assist us in preparing the RFP.*

Please include any additional information that you believe may be beneficial that is not described above.
Appendix A: Michigan’s State Trade Expansion Program (MI-STEP)

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 2</th>
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<td>Get information about new customers</td>
<td>Get information about the specific company need</td>
<td>Track Pipeline, grantees, and grant amount</td>
<td>Ensure Compliance, track reimbursement process</td>
<td>Follow-up to gather metrics for program success measurement</td>
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- Get information about new customers
- Web to Lead
- Get information about the specific company need
- Account/Contact
- Create Portal User
- Application
- Opportunity
- Incentive
- Reimbursement Milestone Metrics
- Disbursement Request
- Progress Report Metrics