

Attachment A, Vendor Questions

Instructions: Please answer all questions below, while not required, vendors are encouraged to answer all questions. If a vendor elects not to respond to a question, please provide feedback on why.

General Questions

1. Please state whether or not your company would consider bidding on a CRM RFP for services described within this RFI. If you are not interested in bidding, please tell us why.
2. Please provide a brief summary of your CRM solution.
3. Covered California believes that all CRM solutions run in the cloud. Does your solution run the cloud or is it an on-prem solution? If it's an on-prem solution please provide documentation that our infrastructure team may need for review.
4. Please describe your experience with integrating with a digital service similar to California Eligibility Enrollment Retention System (CalHEERS) which is the system of record for consumer case/application data.
5. Please describe how you would approach Covered California's need for an internal and external knowledgebase.
 - a. Please include the time it normally takes a Knowledge Staff Employee to become proficient in the solution.
6. Please list three competitive advantages that differentiate your CRM solution from others.
7. Covered California is required to maintain all data related to eligibility and enrollment for 10 years. Can your solution meet this requirement? And, if so, how?
8. Covered California is exploring the use of mobile for internal and external users. Please describe how your solution would handle this.
9. Covered California currently is using Lithium ~~and Sprinklr~~ for social media interactions. Could your solution allow for Covered California to discontinue these external applications or allow for customer data and interactions to flow to the CRM solution?
10. Please share any feedback, suggested requirements, or other information your company would consider important for the State to consider with respect to the CRM procurement.
11. Please share what your thoughts on how Covered California should best approach its chat offerings. Should Covered California continue its chat channel through CRM or should we look at implementing chat through our Cisco stack.

12. Covered California currently offers chat in English and Spanish please answer the following questions:

- a. Do you support the following languages? English, Spanish, Arabic, Chinese, Hmong, Korean, Russian, Tagalog, Armenian, Farsi, Khmer, Lao, Vietnamese.
 - i. If you do not currently support a language do you plan on supporting it at a later time?
- b. What steps does Covered California need to take to ensure they are able to increase the chat language offerings at a later time?

Contracting and Pricing

1. Please answer the following in regards to pricing:
 - a. Describe any pricing policies concerning subscriptions, particularly with regard to discounts for multiyear contracts, volume, and terms for commencing relationships and renegotiating renewals.
 - b. Describe in detail your primary pricing model and unit costs.
 - c. Do you subscribe or license your product line based on named users?
 - d. Do you offer role-based subscriptions or licenses on a per-user basis?
 - e. Do you offer module-based licensing?
 - f. Do you offer subscriptions or licenses based on the number of active customers (defined by customer master files or customer and prospect files)?
 - g. Do you offer subscriptions or licenses based on the number of transactions (e.g., based on the number of purchase orders)?
 - h. For subscription-based pricing, do you either discount fees or forgo charges for the period required to implement the solution?
 - i. For subscription-based pricing, do you provide for a grace period at the end of a contract to allow for negotiations on renewals (as opposed to having automatic renewal clauses, having the software simply cease functioning, or having fees adjust to then-current pricing policies)?
 - j. For subscription-based pricing, do you provide test or sandbox environments free of additional charges? How about cloning?
 - k. Do you offer a way for Covered California to not be charged for licenses that are only used seasonally?
2. Do you provide functionality descriptions in the contract, and can you guarantee that the system functionality will never be diminished?
3. Do you extend the terms and discounts negotiated for the initial purchase to future, additional purchases over a defined period?

4. Do you allow exchanges of unused licenses or subscriptions (aka shelfware) for other products of similar value in your portfolio?
5. Do you provide a source code escrow account a client can access in case your company is acquired, or you discontinue a product?
6. Please describe any additional costs for add-ons, options or third-party, bundled products which may be required for use with relevant products of interest.
7. Are there additional charges for data extracts? If so can you please provide them, also are these rates guaranteed through the duration of the contract.
8. Please provide all standard contract documents including customer responsibility that would be required for this transaction.

Maintenance and Support

1. Is there a dedicated customer success team to support your clients?
2. Do you assign a named customer success manager for each client?
3. Does the customer support team assist in the adoption of your CRM software solutions?
4. Describe the job role (goals) for your customer success team.
5. Do your customer success managers assist clients with resolving priority issues?
6. Does your organization provide migration planning services for clients?
7. What should Covered California consider to be a reasonable system availability or uptime SLA (for example, 99.999% uptime)?
 - a. Please describe what uptime SLA means to your company?
 - b. Are there different SLAs for Business Hours and Non-Business Hours?
 - i. If yes please describe the difference
8. What performance monitoring tools does your solution offer?
 - a. What is your standard notification for degradation and/or system outages?
 - b. What are your current performance monitoring tools being utilized?
 - c. What are your security breach and notification protocol?
 - d. What is your time to notification for degradation and system outages?
9. What is your recommendation regarding data conversion of existing contacts and incidents?
10. Does your organization provide a lead time prior to an upgrade (if so, how long)?

11. How frequently are upgrades scheduled, and what is the average downtime for the CRM system to accommodate an update?
12. What is the process to evolve or improve your product from one version to the next to make it more useful to the user?
13. Do you have a release schedule established on planned enhancements, new functionality and new technology to be delivered during the next two years?
 - a. Is a detailed, current description of the release schedule for your CRM solutions available for review?
 - b. Briefly describe three to five significant enhancements planned for your product or product portfolio during the next year or upcoming release.
14. Please describe how pricing varies for different levels of maintenance and support (including periods of coverage and response times)
15. Please describe the priority and severity levels you assign to support requests, including the resolution SLAs you maintain for each and escalation process.
16. Do you price maintenance as a percentage of total discounted licenses purchases (as opposed basing it on list price)?

Technical Criteria

1. Please indicate the scalability of your solution. What are the size limitations for records including reporting limitations?
2. Please provide a list of all available APIs.
3. Describe how your system complies with Section 508 of the Rehabilitation Act of 1973 ADA 508c3.
4. Are you FedRamp Certified? If not are you working on becoming certified?
 - a. Please provide the pricing difference between the following cloud options: Public, Gov, and FedRamp
5. Provide a listing of all active certifications and roadmap for any future certifications.
6. Does your system offer Single Sign On (SAML)?
7. Does your system comply with the following security standards:
 - a. NIST 800-53 Recommended security controls for federal information systems and organizations (security guidelines for moderate level data)
 - b. MARS-E (current version), Minimum Acceptable Risks and Standards for Exchanges
 - c. FIPS 140-2
8. What language is needed for customization and coding of your solution?

9. Does your system allow for Public Internet connection for data connectivity?
10. Does your system integrate with Oracle Eloqua?
 - a. How would you complete the integration to allow staff to access marketing materials that have been sent to consumers?

Training

1. Are published prices on training materials, such as documentation, computer-based training modules and user guides, publicly available on your website?
2. Do you offer discounted group training packages, resulting in a lower per-person price point?
3. Do you offer free computer-based training via the internet for users?
4. Covered California is interested in having a solutions that would enable end users to customize, and maintain reports. Please describe the type of training available for this type of user?
5. What training options to you have for admins?
 - a. What training courses do you recommend admins take prior to the start of an implementation?
6. What is the average time needed for an admin to be able to complete standard day-to-day tasks and general change requests?
7. How long does it typically take a user to become proficient with the solution?
 - a. What is a typical customer's pace of adoption?
 - b. What techniques do you use to drive adoption?