	QUESTIONS	RESPONSE
-	General RFP Questions	
1.	Is all work completed by vendor required to be performed onsite or would only relevant meetings that include the Covered California project team be required onsite, including post go live support?	Covered California (CC) anticipates the need for a blended model where there would be a need for onsite meetings with CC stakeholders and some work could be performed remotely. Location will be driven by needs and the respondent should propose the model they believe best meets the requirements outlined in the RFP.
	Account Setup	
2.	How many users will be accessing SFMC?	30 total internal SFMC users; 12 of which will access SFMC on a daily/weekly basis.
3.	Do different emails / campaigns have the same header & footer? Any differences?	Yes, there are differences in the header. The footer remains the same.
	What is the from name and from address for your email sends? Do they differ between campaigns?	<u>CoveredCA_Outreach@covered.ca.gov</u> – it does not change between campaigns.
5.	How do you manage unsubscribes / profile data / preference updates (e.g. standard profile & preference center vs. custom)?	Unsubscribe link to a custom preference center is provided in every email.
6.	What is your average, daily send volume?	We don't typically send daily, but if you average it per day, the average daily send during our open enrollment period is around 160,000. For February through September, the average daily send volume is around 35,000, though again we don't send daily.
7.	How many private IP addresses are you using today? Have you thought about your strategy after migrating to SFMC? For example, are marketing and transactional sends sent from different IPs?	Shared range of 15 IPs. The respondent should propose the model they believe best meets the requirements outlined in the RFP.
8.	Do you have any peak sending events that would stress your IP address maximum send volume (e.g. holidays, sales, events)?	Yes, Renewal + Open Enrollment Oct – Jan.
9.		Yes, we allow consumers to reply back, but in our footer, we explain that replies are not monitored. We also have an automatic reply.
10	. What types of emails are you sending to customers today (transactional, promotional, onboarding)	Transactional, promotional, onboarding and exploring more in the future.
	Content	
	. Do you need assistance with the creation or migration of email or email templates in SFMC?	Yes. We would like to be trained on both creation and migration.
12	. Will you be using an agency to create designs and copywriting for emails, landing pages, sms, and preference centers?	We primarily handle all of these functions in house, though we could work with an agency in the future.
13	. Will you be able to provide mockups and all collateral needed to re-create the mockups in Marketing Cloud such as images, hex colors, etc.?	Yes.

14. Will you provide translations for languages other than	Yes.
English?	
Surveys	
15. Can you provide any examples of the types of surveys you are looking for? How many questions might be on a single survey?	We are working on a survey plan and strategy for next year. Our past surveys have been sent to our members and were relatively short, but this is not indicative of future efforts.
16. How often are surveys sent? Are they triggered from certain events that occur in either Salesforce Service Cloud or CalHEERS?	We are working on a survey plan and strategy for next year. The previous surveys have not been driven by triggers from events Salesforce Service Cloud or CalHEERS. We are open to discussing these options with the selected contractor.
17. Will you need assistance creating new surveys in SurveyMonkey?	Possibly.
Data	
18. Is CalHEERS already integrated into Salesforce? If so does it have all the data you will need or is there some data that is not in Salesforce?	Limited CalHEERS data is integrated into Salesforce Service Cloud, however, additional CalHEERS data is needed, which is currently sourced through a batch file from the data warehouse.
19. What type of data will be required to integrate from CalHEERS? Can you provide a list of objects/tables? # of records?	Data from CalHEERS is used to update contact records. Specific data elements will be provided to the selected bidder.
20. How often is the data in CalHEERS updated? Is their a requirement for real time integration or is batch acceptable?	Batch is acceptable.
21. What kind of data will be needed from Salesforce Service Cloud?	Account and Contact data.
22. Will there be any PII or HIPAA data that will be needed in Marketing Cloud for segmentation or personaliation?	Yes.
23. Will the data require transformation?	Data transformation and migration strategy should be proposed by the bidder given the context for the constraints and requirements of Eloqua and SFMC database and data import/export tools and will be driven by needs of the project.
24. Do you need to migrate the tracking data from Eloqua?	Yes.
Journey BuilderSMS	
25. Have defined journeys/campaigns been identified? If not can you provide general examples of what they might be?	Yes, Open Enrollment, Renewal, Welcome, Special Enrollment, Lead Capture, 1095, Retention, Undeliverable Mail and more. We are also exploring additional campaigns.
26. Are the open enrollment and special enrollment period campaigns included in the 16 multi-step campaigns listed under email or are they separate? If separate would they include both email and sms?	Yes, both are included in the 16 multi-step campaign
27. Will any of the SMS messages require the recipient to reply?	Not at this time.

28. Will you be doing any marketing that displays the sms short code for prospects or members to send inbound texts to you?	Not at this time. This is something we may consider if resources are allocated to respond to prospects' inbound texts.
29. Are you looking to reach customers across the globe?	No, California only
30. Is the prospect campaign one individual campaign with 40 messages or these 40 individual prospect campaigns?	There are currently 3 campaigns – Open Enrollment, Special Enrollment and Lead Capture.
Cust Pref Center	
31. Will subscriber profile and subscription information be managed on your site or in SFMC?	We would like it to be managed within SFMC but we are open to discussing other options.
32. What is the current subscriber unsub process today? If subscriber unsubs do they unsub from the Business Unit, Unsub from BU only, or from Enterprise? Are there different rules for different BUs?	We do have an email preference center so that subscribers can elect to unsubscribe from different category types of emails or globally unsubscribe.
33. What communication channels will this pref center be inclusive of?	Email only. However, we can discuss if changing this is beneficial to the consumer.
34. Can you send a link to your current profile/subscription center?	LINK
35. Do subscription profile/subscription options vary based on business unit or other subscriber specific information?	Not at this time.
36. What creative inputs will the customer provide?	Yes, Layout, Content, & Look and Feel.
37. Will the preference center require responsive design?	Yes.
38. If responsive, is there a strategy outlining what content to show based on target media screen size?	No, it must all be responsive.
39. What is your unique subscriber identifier (email address, customer number, other)?	Email address at this time.
40. Will any form fields be pre-populated?	None currently but we are open to discussing options within SFMC.
41. Will there be any other data sources contributing to the subscriber or subscription data?	Yes, CalHEERS data will contribute to the subscriber or subscription data.
42. Can you provide a description of each subscription (content, frequency, etc.)	We only have one email subscription currently, but subscribers can subscribe or unsubscribe to the following email categories (Enrollment Information and Dates, Health Tips and Newsletter, Helpful Account Tips, Surveys, Tax Information about 1095, and globally unsubscribe).
43. Is it a requirement for users in Salesforce to be able to update someone's preferences on their behalf?	Yes, this is a requirement.
Change Management	
44. How many users will be accessing SF MC and what are their personas?	Approximately 12 internal users who will span the following personas: 1) Marketing Manager 2) Leadership 3) Marketing Specialist 4) Designer-Developer 5) IT Services

45. For each persona, what level of expertise will they need for MC? What key things will they need to accomplish in the system?	 Marketing Manager: oversees teams, projects, and campaigns Leadership: uses data to craft CC's marketing strategy Marketing Specialists: build and execute campaigns and use data to find insights Designer-Developer: creates and codes marketing assets IT Services: supports marketing and data operations
46. Where are the users located? i.e. are they all on site in Sacramento, or does knowledge transfer need to include digital strategy as well as on site? What has worked best for CC in the past?	All users are in Sacramento, CA
47. Who will be the MC system admin? What is their level of expertise (how much training will they need)?	The SFMC system admin will be a dedicated resource from CC's Information Technology Division who holds Salesforce developer and administrator certifications. This admin will ramp up on additional SFMC training as required.
48. Does CC have internal training or communications resources that would work on this project? If so, how much bandwidth would they be devoting & what specific items will they own?	While CC has internal training and communications resources, the Contractor shall provide all needed resources that ensure a successful project.
49. Is the 45 day partial development blackout intended for developing and delivering training, or for only delivering training?	Developing and delivering training.
50. Who will be responsible for drafting project communications collateral on the CC side?	CC will produce communication collateral mock-ups that will be developed into working assets by the Contractor in SFMC.
51. Item 4e notes that the contractor will serve as the SME for development of user guides. Item 14d notes that the contractor shall provide user guides. Which requirement is correct? We find that user guides and desk procedures quickly become outdated without ongoing maintenance. Is there someone internal to CC who will own ongoing user guide/desk procedure updates? If not, could recorded webinars be used in lieu?	User guides shall be developed and provided by the Contractor, including the coordinating and tracking of versioning to avoid re-work or miscommunication. The respondent should propose the model they believe best meets the requirements outlined in the RFP.

52. Change management & operational readiness plans are called out in part 1 h. What deliverables are anticipated in scope as a part of each? Is change management intended to mean managing user success, or does it refer to change management as system governance over time? (i.e. how is the MC backlog managed over time)	For the initial deployment, change management and operational readiness plans should be structured around technology enablement, content, and adoption.
53. Are current Eloqua users aware of the need to change systems? i.e. do they see a compelling rationale for SF MC and will they want to make the change?	Yes.
54. Item 15c notes "continued extensive training of end users" what is the vision with this statement? Our standard implementation is to complete training prior to go-live and then to be available for support and Q&A on the new solution - i.e. act as a "pull" resource as needed. What is the vision beyond being a pull resource (what kind of scheduled training would we be expected to provide for over 2 months post-go-live?)	CC anticipates extensive training prior to go-live and limited support as a "pull" resource post go-live as required.
Other Questions:	
55. Is creation of the messaging strategy and content for the emails and other messaging channels in the scope of the RFP? If not, who will be providing?	Not required as CC Marketing will provide, but we are open to hearing new ideas.
56. In the scope of work you mention 16 – Multi-step email campaigns and 8 – Single-step email campaigns. Do you have an estimate of the number of touchpoints in each of the campaigns? A touchpoint could be defined as an email, SMS, push notification, etc.	Some can be up to 40 touchpoints, some only one.
57. Does Covered CA utilize any email templates currently? If so, can you provide examples in HTML format?	Yes, templates are built in Eloqua – not HTML. Training will be needed on how to rebuild all templates in SFMC.
58. Section F of Exhibit A states that all work must be performed onsite. Is this requirement for all services provided or just reporting?	See response to Question 1 above.
59. What are you expecting to be translated for the languages listed in task 1G in Exhibit A?	Spanish at this time, but we could explore additional languages in the future.
60. Approximately how many users would be added to Marketing Cloud?	See response to Question 1 above.
61. Does Covered CA plan to use multiple business units? (Do certain groups and their data within Covered CA need to be separate from other groups and their data?)	No.

62. Approximately how many other systems will Marketing	CalHEERS: CC's system of record
Cloud integrate with? (Outside of Service Cloud.)	Tableau: For reporting and dashboards
a. What are the main functions of these systems?	Google Analytics 360: For reporting and lead scoring
b. What is the main goal of the integrations? (Is it	
for passing contact data?)	
63. For data that is migrated from existing systems into	Data migration is a task of the Contractor as outlined in the
Marketing Cloud, does Covered CA plan to scrub the	RFP.
data internally or is this an expected task of the	
consultant?	
64. Will the email/campaign/SMS content be provided by	Provided by Covered California.
Covered CA or is this a task of the consultant?	· · · · · · · · · · · · · · · · · · ·
65. Does Covered CA have a dedicated graphic	Yes, we have an in-house graphic designer.
designer/branded digital assets ready or will the	
consultant be responsible for producing digital assets	
for email templates, campaigns, etc.	
66. We kindly request a 1-week extension of the due date.	The RFP dates are firm. We are not granting extensions at
	this time.
67. Please describe your current pain points using Oracle	N/A
Eloqua.	
68. Besides Service Cloud (and the objective of	In addition to Service Cloud, CC currently uses Sales
implementing Marketing Cloud), does Covered CA use	Cloud and Community Cloud.
any other Salesforce products? Do you have interest in	Cloud and Community Cloud.
using other Salesforce products?	Approvimately 12 users
69. Approximately how many Covered CA staff would need	Approximately 12 users.
to be trained on Marketing Cloud functionality? 70. How many TOTAL contacts/subscribers do you have	~For email, 5 million subscribers. ~For SMS, 40 thousand
that could potentially receive an email blast or SMS blast from Covered CA?	prospects and ~55 thousand members.
	Emoil Encolment reminders, enhanding, health tine and
71. Can you give some examples of what type of	Email - Enrollment reminders, onboarding, health tips and
messages/campaigns/content would be sent via email	more.
marketing? How about through an SMS campaign?	SMS – Account update requests, deadline reminders,
	payment reminders.
72. What resources from Covered CA would be made	CC resources from Marketing and IT will be made available
available to support this project?	to support this project.
73. Approximately how soon after the beginning of the	As soon as possible. The Contractor should provide
estimated term date do you expect the Marketing Cloud	guidance and a draft timeline based on work performed for
instance to be set up and "launched" for use?	similar projects and/or organizations.
74. For vendors outside of California, during what phases	See response to Question 1 above.
of the project should the consultant team be on-site?	
75. Can you describe the use cases for the 10 landing	Landing pages are used for Surveys and English &
pages in English and 10 landing pages in Spanish?	Spanish Translations
76. What are the use cases for the surveys you'd like to	We are still working on a plan for next year that will contain
send?	USES.
77. Have you seen any demos from Salesforce or a	Marketing has not.
Salesforce implementation partner?	
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78. What types of steps do you envision for the "Open Enrollment" path/campaign?	It depends on the capabilities of the vendor. We will share the steps of our current campaigns with the successful vendor.
79. What types of steps do you envision for the "Special Enrollment Period" path/campaign?	It depends on the capabilities of the vendor. We will share the steps of our current campaigns with the successful vendor.
80. The RFP states that "Responses shall not exceed \$250,000 in total costs." Does that budget cap for the initial year/implementation pertain to costs for Licenses and Implementation Services, or does that only apply to the services component?	Services only.
81. Can the minimum qualifications for all 3 staff be revised to allow for general Salesforce implementation experience (in the case of Lead Business Analyst, requirements gathering experience) at a government or private entity, in lieu of the Salesforce Marketing Cloud specific experience?	CC requires a team that has significant knowledge and experience with SFMC, however, experience with a mixture of Marketing Cloud and non-Marketing Cloud products may be accepted within the discretion of CC.
82. Which department at Covered California would serve as the contract administrator for this project?	CC Information Technology Division
83. Exhibit A, Data Conversion – 8"	There are currently 5 million contacts in Eloqua that will need to be migrated to SFMC.
Data conversion - Please provide the historical, current data volumes, size that needs to be converted?	
84. Exhibit A, Data Integration – 9	No.
Do we need to consider integrating with any additional data sources or business entities other than Salesforce Service Cloud, CalHEERS, Survey Monkey?	
 85. RFP Section 3.2 What marketing channels are currently used? (Outbound, Inbound, Email, Paid Ad, Paid Search, Social, Webinars, Events, etc.) 	Email, Paid Ad, Paid Search, Social, Direct Mail, SMS.
86.RFP Section 3.2	Yes.
Do you have A/B test emails, landing pages and other types of communications?	
87.RFP Section 3.2	Yes, between 50-100.
Will there be marketing emails that need to be migrated into Salesforce Marketing Cloud? a. If so, what is the count?	
88. RFP Section 3.2	CC anticipates owning campaign operations and maintenance post go-live with support from the selected
It's our understanding that post deployment, Covered California will own on-going campaign operations, platform maintenance and support? Please confirm.	vendor as needed.

Vendor shall ensure successful completion of training and knowledge transfer to CC Marketing and IT staff. CC has
certified Salesforce Administrators but will require SFMC
training to address specific platform needs to ensure CC
can fully utilize the solution independently.
CC Information Technology Division
Only Spanish at this time, possibly more in the future.
Depends on what comes native from SFMC. This is what
we hope to learn from the new vendor.
Depends on what comes native from SFMC. This is what
we hope to learn from the new vendor. We are open to
other options.
No.
See response to Question 1 above.
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96. Are we able to leverage resources from our team in Argentina to deliver some of the components of the project?	Use of personnel located in Argentina for Salesforce (Marketing) would most likely represent an "external information system" and, under MARS-E SA-9, CMS approval is required before Covered CA could utilize any external information system service outside of the continental U.S. NIST implementation standards pertaining to SA-9 likewise require that the contract under which such services are utilized contain provisions wherein the vendor would agree to be subject to U.S. Federal laws pertaining to PII and that the service provider contractually agree to abide by Exchange privacy and security standards. Consequently, while the Contractor could theoretically utilize personnel located in Argentina, CC's ISO and Privacy Office would first need to subject a Change Notification form to CMS request approval.
97. Do you want a copy of the RFP on a CD-ROM or will a flash drive suffice?	CD-ROM is our policy.
98. Do you currently utilize a Business Intelligence or Reporting Tool for all your reporting needs? If no, do you intend to implement one?	Yes, Tableau and Google Analytics 360.
99. Do you currently utilize a Business Intelligence or Reporting Tool for all your reporting needs? If no, do you intend to implement one?	See response to Question 98 above.
100. Do you envision that the assets being migrated from Eloqua such as Emails & Templates need any modification in regards to the look and feel?	Yes.
101. How many Active Subscribers do you currently have in Eloqua	Approximately 5 million.
102. How many emails do you send each day from your current marketing solution?	We don't typically send daily, but if you average it per day, the average daily send during our open enrollment period is around 160,000. For February through September (Special Enrollment Period), the average daily send volume is around 35,000, though we don't send daily as well.

103. Can you describe what campaigns are being migrated from Eloqua categorized by Automated (e.g: Customer Journey), Adhoc (e.g: Manual Newsletter send)	All existing campaigns – OE, Renewal, Welcome, SEP, Lead Capture, 1095, Retention, Undeliverable Mail and more.
104. Will there be any new campaigns developed after migration? If yes, could you describe?	Yes, which are still to be determined.
105. Can you provide some examples of segments or filters you create for the campaigns you deploy today?	Some examples of campaign segments include - Renewal, OE, SEP. Some examples of campaign filters include – Application started, Application submitted, new members, passive members, lead capture, etc.
106. Can you describe a few examples of the type of dynamic content you use in your campaigns today?	First name tag.
107. How many email templates and unique emails will be migrated from Eloqua?	TBD.
108. Do you have any other integrations with Eloqua besides Salesforce Service Cloud, Survey Monkey and CalHEERS?	Tableau and Google Analytics 360.
 109. Preference Center: a. Will users be required to login to manage their email preferences? b. Do you envision the preference center to allow users to change their email address and other important contact information or will contact information be read only? c. Do you envision the preference center to update data in real time in other systems such as Salesforce Service Cloud? d. Do you envision integrating Marketing Cloud with other channels such as WhatsApp or DirectMail? 	This depends on the new vendor's capabilities, but: A – They are not at this time, possibly in the future B – TBD C – Yes. D – TBD

 110. Page 11 of Exhibit A states: "The Contractor is required to perform all services under this Agreement on site at Covered California The Contractor is required to perform all services under this Agreement on site at Covered California, unless directed otherwise by the project representative listed in this Exhibit." a. Is this a requirement for this proposal? 	See response to Question 1 above.
111. Can sections 4.3.1 - 4.3.5 be combined into a single document or should they be submitted into separate documents?	It is encouraged that the sections remain separate abiding by the "No more than # of pages" rule for each section.
112. Is the rates column shown in Exhibit B, Attachment1 - Cost Worksheet.docx intended to be hourly rates?Or rate for duration of the contract?	Hourly Rates.
113. For Exhibit D do we just return the document with any comments (using track changes) we may have?	Yes, Bidders may submit as part of their response any changes or exceptions to the Model Contract that they wish to negotiate via track changes. CC's office of Legal Affairs will review and make a determination.
114. With regards to preference programs on page 28, do we get credit on the evaluation process if we apply for applicable preference programs?	Yes, Bidders claiming SB/DVBE will be awarded preference points as stated in RFP.
115. On exhibit C Section F: May indemnification be capped at the amount of fees?	As stated in the RFP, Bidders may submit as part of their response any changes or exceptions to the Model Contract that they wish to negotiate via track changes. CC's Office of Legal Affairs will review and make a determination.
 116. Exhibit A, Pg. 3 – General Scope of Tasks How much dynamic content/personalization is used within your emails 	12 users, all located in Sacramento, CA.
 117. Exhibit A, Pg. 3 – General Scope of Tasks Do all these emails/SMS campaigns currently exist in Eloqua, and is this a 'lift and shift', or are improvements expected to be made to the campaigns and assets, when they're moved over to Marketing Cloud? 	We are open to making improvements when we move to SFMC.

118. Exhibit A, Pg. 3 – General Scope of Tasks	We are open to discussing options to determine lead scoring.
Marketing Cloud does not have an out of the box	U
scoring module like Eloqua. Where do you envision this	
scoring determination to take place, and how?	
119. Exhibit A, Pg. 3 – General Scope of Tasks	Currently, all email campaigns are in English with associated Spanish landing pages available via link in
Are each of the Email/SMS campaigns and assets	email. We are open to discussing the best way to add
such as preference center needed in 5 languages? So,	additional language options in the future.
for example 8 Single-step email campaigns, will really	
be 40?	
120. Exhibit A, Pg. 3 – General Scope of Task	We are open to discussing options to determine lead scoring.
What are the Landing Pages used for?	
121. Exhibit A, Pg. 3 – General Scope of Tasks	We are open to discussing the number of forms.
How many (if any) forms need to be created?	
122. Exhibit A, Pg. 3 – General Scope of Tasks	It is expected for the 10 survey templates to be built out as Cloud Pages in SFMC.
Do you use a survey tool, or is it expected for the 10	
survey templates to be built out as Cloud Pages in	
SFMC?	
123. Exhibit A, Page 3 – General Scope of Tasks	We are open to creating a new Email Preference Center in SFMC.
Can you please provide screenshots of what your	
preferences centers look like now, and if you envision	
them keeping the same look and feel and functionality?	
124. What tool do you use for Analytics and Reporting,	We use the out of the box reporting as well as Google
or are you planning to use out of the box reporting	Analytics 360 and Tableau reporting. We would like to
capabilities in SFMC?	learn more about the out of the box reporting of SFMC.
125. What other data sources will need to be tapped	See response to Question 108 above.
into for the 'Custom dashboards/reports from multiple	
data sources'	
126. Are all data systems, including CalHEERS feeding	See response to Question 98 above.
into Service Cloud? If not, which ones are not, and	
what are their functions related to the campaigns that	
need to be executed?	
127. What data system is the system of record for users	See response to Question 18 above.
of CoveredCA?	

128. What other data systems apart from Service Cloud and CalHEERS need to be integrated with Marketing Cloud?	Tableau: For reporting and dashboards Google Analytics 360: Analytics
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