ABOUT CATALYST AND SALESFORCE

Hello, and welcome to the State of South Carolina's Statewide Term Contract webpage **for all NEW Constituent Management Services, delivered by Catalyst Consulting Group, Inc.**

In 2019, the State issued an RFP to procure a Statewide Term Contract for an end-to-end Constituent Management System (CMS). In turn, Catalyst will implement Salesforce-based (SaaS) solutions in agencies that express interest throughout the State for the length of this contract.

The information that follows details the key functionality of Salesforce and how to create a budget estimate, and what is typically involved in implementing a Salesforce solution.

In 2019, the State created a new 5-year contract for the same products and services (Contract Number: 4400022647) for ANY NEW Customers who don't already have an INSTALLED BASE.

The Salesforce platform can facilitate the following, and much more:

- Constituent/Citizen relationship management
- Case work management
- Workflow management
- Internal & external communications and outreach
- Account and contact management
- Opportunity, Lead and pipeline management
- Task and activity management
- Reporting, dashboards, metrics and data-driven decisions

Catalyst Consulting will provide implementation service and support for government agencies procuring Salesforce solutions, as well as, provide training services as required. Throughout the life of this contract, the provider agrees to implement Salesforce CMS solutions on an agency by agency basis. This document is designed to give you a "head start" in identifying your needs, requirements, and anticipated budget to implement a Salesforce CRM solution for your agency. Catalyst Consulting Group will be able to provide you with a formal statement of work, pricing quote, and expected implementation timeline upon commencing a project with your agency.

For questions or to discuss your project further, please reach out to any of the contacts below:

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LICENSING, SERVICES and SUPPORT DETAILS

LICENSING DETAILS & COSTS

The ultimate specifications of the Salesforce implementation will vary according to the unique needs of each using government unit. However, the first step universally for each using government unit in South Carolina will be to establish how many users will be encompassed in a Salesforce deployment. To determine which staff members, need licenses, ask if they will need to do at least one of the following to objects or information within the system:

- **C**reate
- **R**ead
- **U**pdate
- **D**elete

If a using government unit staffer needs Create-Read-Update-Delete (CRUD) access, they are considered a licensed user. Salesforce is a scalable platform through which users' licenses can easily be added, as well as, additional Salesforce subscription products can be procured if required.

Disclaimer: Salesforce is an innovative cloud services provider with evolving technology. Salesforce has made a good faith effort to provide you with information that is accurate as of today, 1/6/2020, and within our knowledge. Because Salesforce procedures and policies change from time to time and Salesforce continues to innovate by providing each customer multiple major release upgrades each year, we cannot guarantee that this information will remain the same over time. The rights and responsibilities of the parties regarding your use of Salesforce's online software services shall be set forth solely in the applicable agreement. The information herein shall not be part of a final contract. Please refer to Salesforce's online documentation for the most up-to-date information please.
https://trust.salesforce.com/en/trust-and-compliance-documentation/
https://www.salesforce.com/

PRODUCT CATEGORY: 20832 – CONSTITUENT MANAGEMENT SYSTEM – HOSTED SOLUTION

- Salesforce Service Cloud & Gov Cloud Enterprise edition:

More detailed information on Salesforce' Service Cloud Enterprise Edition licenses can be found here:
- https://www.salesforce.com/products/service-cloud/overview/
- https://www.salesforce.com/products/service-pricing/
- https://trust.salesforce.com/en/trust-and-compliance-documentation/

More detailed information on Salesforce' GovCloud Enterprise Edition licenses can be found here:

- https://www.salesforce.com/solutions/industries/government/compliance/
- https://www.salesforce.com/form/conf/industries/government/salesforce-government-cloud/?d=7010M000002JIjDQAW&conf-redirect=true

Budgetary prices for licensing/subscription are costed on a "per user per month" with a required 12-month subscription time frame. Specific license costs for the requesting business unit, can be quoted at the time of need for a formal annual cost. Prices identified below are for estimation purposes only and based on the requested quantities of 25, 75 & 149 users, the vendor can provide licensing for any ultimate user count.

Salesforce License Product	25 users	75 users	149 users
Service Cloud + GovCloud | Enterprise Edition	$ 163.31	$ 161.13	$ 150.24

- *Prices above are based on a "per user per month" cost*
- *Actual license costs can be provided to the business unit as needed.*

Volume discounts can be extended off list pricing as applicable, the below chart details these tiers:

TIERED LICENSE DISCOUNTS

Discount Tier	% Volume Discount Off List Price (Purchase)
26-49 Service Cloud + GovCloud Enterprise Edition users	18% discount off List price
50-74 Service Cloud + GovCloud Enterprise Edition users	18% discount off List price
75-99 Service Cloud + GovCloud Enterprise Edition users	19% discount off List price
100-124 Service Cloud + GovCloud Enterprise Edition users	19% discount off List price
125-149 Service Cloud + GovCloud Enterprise Edition users	19% discount off List price
150-175 Service Cloud + GovCloud Enterprise Edition users	24% discount off List price

PRODUCT CATEGORY 20832: LICENSING, SERVICE COST DETAILS, RATE SCHEDULES, AND TRAVEL COSTS

Catalyst Consulting would scope out each implementation on an agency-by-agency basis for each business unit's unique requirements and user count. The ultimate quote will include licensing, implementation, testing, training, travel, and ongoing support services for the 1st year or term.

Each governmental unit will have a unique set of requirements and vision for the system to be implemented, and costs for services will vary based on the individual unit's needs. Based upon the defined unit scope, we will provide a quote for the one-time set-up costs, and ongoing support based on the proposed resources' rates. Implementation costs will be based on the services provided through various stages of our delivery approach, which can include:

1. Discovery and Requirements Gathering

2. System Design, Configuration, and Development
3. Data Migration
4. External System Integrations
5. Functional Testing and User Acceptance Testing
6. End User Training
7. Deployment and Hypercare Support for One Year

The below table identifies the resources/roles and hourly rates for services. Their involvement in each government unit's implementation depends on the scope and complexity of the project.

Resource Type	2019-2020 Hourly Rate
Project Manager	$175/hour
Sr. Solution Architect	$165/hour
Solution Architect	$155/hour
Technical Architect	$185/hour
Salesforce Developer	$175/hour
Trainer	$165/hour

The above rates do not include travel costs. Travel cost estimates can be provided based on the unique project scope of the subsequent government agencies and will utilize GSA travel guidelines. All travel and expenses will be billed at actual cost and only as utilized.

PRODUCT CATEGORY: 92045 – SOFTWARE MAINTENANCE/SUPPORT

Support costs will factor in the annual renewal costs for licensing and estimated support and maintenance services. Year-over-year support and maintenance will only incur costs on an "if-and-as" consumed basis.

Salesforce licensing must be renewed on an annual basis. Annual renewal increase will not exceed 7% year over year, provided the renewal is for a minimum of the above represented user subscription quantities/configuration and a minimum of one-year renewal period.