# Request for Proposal

## Sales Management Operations

### Corporate Relations

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## Summary and Background

Scrum Alliance is the largest, most established, and influential professional membership and certification organization in the Agile community. With over 450,000 certified practitioners worldwide, Scrum Alliance continues to expand its offering to its members while seeking to grow its corporate relationships.

Scrum Alliance is currently accepting proposals to assist the Corporate Relations team in establishing a sales operations system of record using Salesforce.com as the CRM platform and increase selling effectiveness from advisory on recruitment of business development staff to the establishment of a clear end-to-end sales process and operations.

Scrum Alliance is building relationships throughout the globe and needs to continue managing these client interactions in a central location that identifies opportunities for the organization.

The purpose of this Request for Proposal (RFP) is to solicit proposals from various candidate organizations, conduct a fair and extensive evaluation based on criteria listed herein, and select the organization who best represents the direction Scrum Alliance wishes to go.

Our client base consists of small to large-sized businesses across the globe that are in several business sectors of the world including; banking and finance, manufacturing, software development, product development, and many more.

### Our services include:

- Global Conference Event Sponsorships
- Digital Marketing
- Content Marketing
- Sponsored Webinars
- Digital and Print Magazine Advertising
- Membership Discount Program
- AgileCareers Job Board

## Proposal Guidelines

This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until 5pm PST January 6, 2017. Any proposals received after this date and time will be returned to the sender. All proposals must be signed by an official agent or representative of the company submitting the proposal.

If the organization submitting a proposal must outsource or contract any work to meet the requirements contained herein, this must be clearly stated in the proposal. Additionally, all costs included in proposals must be all-inclusive to include any outsourced or contracted work. Any proposals which call for outsourcing or contracting work must include a name and description of the organizations being contracted.

All costs must be itemized to include an explanation of all fees and costs.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions will be subject to review by Scrum Alliance legal department and will include scope, budget, schedule, and other necessary items pertaining to the project.

## Project Purpose and Description

### The purpose of this project is as follows:

Scrum Alliance is currently using Salesforce.com as the main tool for managing client relations and prospective client engagement. The platform is very robust and requires experience and expertise to maximize its full capacity that will, in return, assist the corporate relations team in operating more efficiently.

There are several opportunities in the pipeline for Scrum Alliance that will need to be captured inside of Salesforce.com CRM so these leads must be nurtured and managed accordingly to ensure successful client partnerships.

### Project Description:

Scrum Alliance is seeking a company to establish and develop a sales operations system of record for managing our clients and utilizing Salesforce.com CRM platform. Throughout this project, the selected company will work heavily with the corporate relations team as well as include certain areas of the marketing team to ensure a successful cross-collaboration of our marketing automation software, Marketo.

In addition to working with both teams internally, here are some key areas of the project that should be addressed within your proposal:

- Establish formal objectives
- Identify key sales performance metrics
- Create reports for use by sales team, management, and the executive team
- Advise on Marketo automation software integration
- Propose non-negotiable requirements for sales reps
- Recommend simple sales step approach
- Advise on ways to build sales team and sales team management

## Project Scope

The scope of this project includes all design, development, coding, documenting, and training of Scrum Alliance's corporate relations sales operation. Access to necessary software and practices will be provided to selected organization.

The selected bidder will be responsible for planning and conducting a thorough analysis of the current state of sales operations through conversations with relevant stakeholders of Scrum Alliance. This portfolio will analyze all current contacts and determine target demographics for future and potential clients.

The following criteria must be met to achieve a successful project:

### Ease of Use:

- A simple user interface with many-to-one account viewing and one-click anywhere navigation
- Customizable menus, tables, and desktop based on user or role
- Required fields, optional fields, and non-editable fields are individually color coded for an at glance visual que

### Sales Process Automation:

- New leads or accounts can be automatically assigned to sales staff based on various criteria (such as territory, product, sale type)
- Ability to automatically notify sales staff of new lead or account assignment
- Ability to schedule an account next step or 'to do' item or reminder for one or more people, to be delivered at the same or different times using Marketo
- The ability to document the sales cycles and sales process best practices
- The ability to attach and link any sales cycle or best practice to any page in the CRM application

- The ability to automate exception-based and recurring sales cycle processes throughout the system
- The ability for the system to insert and assign a specific sales plan to a lead or client based on type of sale opportunity
- Alert notifications in the event sales cycle data is added, is changed, or fails to change over a user-defined period
- E-mail templates can be used to send personalized e-mails to individual contacts based on an activity or inactivity
- Leads from our website are automatically imported to Salesforce.com CRM and assigned to a resource as well as imported into Marketo
- Provide a workflow toolkit in order to allow the user to create and automate their notifications, approvals or data routing to ensure accounts and sale opportunities are followed through effectively
- The ability to sync Salesforce.com lead information with Marketo marketing automation software for email campaign nurturing

## Opportunity Management:

- User-defined sale closure probability scale with a structured definition for each probability percentage factor
- Ability to track opportunities through user-defined sales steps (e.g. Qualification, Discovery, Presentation, Negotiation, etc.)
- Each opportunity captures a lead source, sales person and sales manager
- Opportunities identify specific products and solutions
- Automatic quote generation from an opportunity
- A products inventory with flexible price lists
- Customer class or customer specific price lists
- Ability to identify competitors in each sale opportunity and perform opportunity specific competitive analysis

## Time & Task Management:

- Synchronization of contacts, activities and items with MS Outlook
- Calendar views allow user-defined task types to display (e.g. Calls, Appointments, Meetings, To Do Items)
- Calendar views can be displayed for individual or multiple prospect or customer accounts
- Calendar views can be displayed for multiple resources (in a side by side view)
- Users can view their task list by date, priority, account and task type
- Users can complete their tasks without leaving the Task List (e.g. make calls, send e-mails, schedule reminders and create next steps all from the Task List)
- Tasks or To Do items can be automatically escalated to other resources

## Quota Management:

- Ability to maintain multiple sales quotas for each sales resource during the same period (e.g. revised quotas during the year)
- Ability to establish quotas by user-defined periods (e.g. day, week, month, quarter, year or other)
- Ability to establish quotas by product or service
- Ability to establish quotas by client account (e.g. for national account selling)
- Standard library of quota management and quota performance reports
- Quota data mart with OLAP (online analytical processing) for slicing and dicing sales staff quota performance across multiple measures and dimensions

## Sales Reporting & Analysis:

- Includes a Reporting Library of at least dozens of commonly used sales reports
- Ability to track all account activity and history in a single location by date, user, activity type, priority, status and more
- Sales reporting can roll-up by territory, office or geography
- Sales reports offer searching, 'drill-through', 'drill-down' and one-click export to Excel, PDF, web pages, XML or CSV
- Includes a report writer for custom sales reporting or creating new reports from scratch
- Includes a data warehouse suite for sale opportunity, forecasting and activity OLAP (online analytical processing) analysis

## System Administration:

- Able to globally secure all accounts by salesperson, sales manager, user or role
- Able to over-ride global security settings and apply account specific security for any individual account or customer
- Able to view a historical audit trail which displays all changes made to an account, including the user who made each change and the date, time and exact fields that were changed
- Vendor provides a Mass Modify tool to make specific or global edits to data (e.g. reassign all accounts from one sales person to another sales person, territory realignment, etc.)
- Duplicate accounts can be automatically merged into a single account
- A contact associated with one account can be automatically moved to another account
- A non-technical user is able to modify, add to or remove menu items throughout the system for individual users or roles (in order to remove features and functions with don't apply to select users or roles)
- A non-technical user is able to link or integrate the CRM application with other Web-based applications

# Request for Proposal and Project Timeline

## Request for Proposal Timeline:

All proposals in response to this RFP are due no later than 5pm PST January 6, 2017.

Evaluation of proposals will be conducted from January 9, 2017 – January 13, 2017. If additional information or discussions are needed with any bidders during this one-week window, the bidder(s) will be notified.

Upon notification, the contract negotiation with the winning bidder will begin immediately.

## Project Timeline:

Project initiation phase should be completed by early February.

Project planning phase must be completed by mid-February. Project planning phase will determine the timeline/schedule for the remaining phases of the project.

# Budget

All proposals must include proposed costs to complete the tasks described in the project scope. Costs should be stated as one-time or non-recurring costs (NRC) or monthly recurring costs (MRC).

NOTE: All costs and fees must be clearly described in each proposal.

# Bidder Qualifications

Bidders should provide the following items as part of their proposal for consideration:

- Description of experience in planning, building, and executing a sales operation management program
- List of how many full time, part time, and contractor staff in your organization
- Examples of 3 or more sales operation implementation projects that were executed by your organization
- Testimonials from past clients on the success of your sales operation programs
- Anticipated staff you will assign to this project (total number, role, title, experience)
- Timeframe for completion of the project
- Project management methodology

## Proposal Evaluation Criteria

Scrum Alliance will evaluate all proposals based on the following criteria. To ensure consideration for this Request for Proposal, your proposal should be complete and include all of the following criteria:

- **Overall Proposal Suitability:** proposed solution(s) must meet the scope and needs included herein and be presented in a clear and organized manner
- **Organizational Experience:** Bidders will be evaluated on their experience as it pertains to the scope of this project and the use of an agile framework approach
- **Previous Work:** Bidders will be evaluated on examples of their work pertaining to Salesforce.com implementation including creation of executive and management reports, sales rep sales step processes, forecasting, pipeline analytics, trend analysis, and Salesforce.com custom development solutions
- **Value and Cost:** Bidders will be evaluated on the cost of their solution(s) based on the work to be performed in accordance with the scope of this project
- **Technical Expertise and Experience:** Bidders must provide descriptions and documentation of staff technical expertise and experience

### Questions?

We know you will have questions!  Please email Shawn Tretter to expedite any answers.

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