Marketing Cloud Services RFP 2024 Questions and Answers

1. Is there a standard pricing format/pricing sheet you’d like respondents to utilize?

**Answer:** There is no standard format/pricing sheet.

1. Is there detailed functional requirements document available beyond the main RFP document?

**Answer:** There is no functional requirement document available.

1. Wanted to check regarding if this work requires onsite presence OR can it be done offshore with just coordination from onshore?

**Answer:** The work can be done remotely.

1. The name of the incumbent vendor currently responsible for the project?

**Answer:** The incumbent vendor will be shared with the winning respondent.

1. The current budget allocated for the solicitation.

**Answer:** The current budget does not pertain to this RFP.

1. Please also confirm that it’s a sole source or multiple awards.

**Answer:** It is the intention of DESC to award one winning bid.

1. We would like to know the spend amount of last year under this contract.

**Answer:** The current budget does not pertain to this RFP.

1. On the DESC Form A - Should the contact information be from the operations team who handles logistics like legal, finance, etc. or should the contact information be for the best person to contact about the specific contents of the RFP from the implementation perspective**?**

**Answer:** Provide contact information for person to be contacted on matters involving the application.

1. On the DESC Form A - Can you specify how we should fill out the Funding Request Information? If our proposal estimate is $50, would that mean we are requesting $50 from DESC (top line) or would we put that under the “Applicant” line? What is the ‘Profit’ line for?

**Answer:** For the context of this RFP, filling in Total Est.Funding Request in this section will suffice.

1. How many business units do you have in Marketing Cloud?

**Answer:** We only have one business unit for DESC.

1. What is the size of the Job Seeker audience (both lead and signed up talent) (1,000 - 10,000, 10,000-100,000, 100,000+)?

**Answer:** The size of the jobseeker audience is about 100,000.

1. Do you have a test environment in Marketing Cloud and Salesforce? If so is it a requirement to build in TEST and push to prod in Marketing Cloud? Or is the expectation to build in prod Marketing Cloud?

**Answer:** We test our emails, journeys, and CloudPages before they’re published.

1. Do you have the Marketing Cloud Connector between Salesforce Sales Cloud and Marketing Cloud for all business units? If so, is it set up with all objects and corresponding fields synched?

**Answer:** Yes, we have a Marketing Cloud Connector between Salesforce Sales Cloud and Marketing Cloud.

1. What are all the data sources that feed into Marketing Cloud that are related to the Marketing Automation solution?

**Answer:** LaunchPad is our only data source.

1. What are all the data sources that Marketing Cloud sends data to as part of the Marketing Automation solutions?

**Answer:** We will discuss with the winning responder.

1. Will the workstream need to integrate with the two websites https://descmiworks.org/ and https://detroitatwork.com/? If so does the team have configuration access to both of these websites?

**Answer:** The workstream will have to integrate with [www.DetroitatWork.com](http://www.DetroitatWork.com) since that is the jobseeker facing website.

1. What platform are the sites created/hosted on and is it currently integrated with SFMC?

**Answer:** wwwDESCMiWorks.org is created and hosted on WordPress and [www.DetroitatWork.com](http://www.DetroitatWork.com) is created and hosted on Drupal.

1. How many functional and developer employees currently use/support the Marketing Cloud and/or Sales Cloud platform and what are their skill levels?

**Answer:** There are generally four people with various skill levels.

1. How many existing journeys do you have?

**Answer:** We have approximately 21 active running journeys.

1. Do you have a roadmap of journeys to build out and if so how many and their goals?

**Answer:** No, we don’t have a roadmap at present. We create journeys based on marketing needs.

1. Do you utilize data extension, SF data and API journey entry activities?

**Answer:** Yes, we utilize data extensions primarily to create journeys.

1. Do you utilize advanced journey activities that leverage data from CRM or custom attributes in data designer?

**Answer:** No, not that we are aware of.

1. Do you use activities that update Salesforce CRM objects?

**Answer:** No, not that we are aware of.

1. Do you use activities to drive additional omni channel areas like social, print, etc?

**Answer:** No, not really.

1. How often and what types of digital messaging (email, SMS) do you currently send to leads/job seekers/employers?

**Answer:** We send messages monthly as well as reminder emails when someone signs up for a class or test.

1. How many emails are sent on a daily/weekly/monthly basis?

**Answer:** Approximately 100,000 emails are sent a month.

1. Is messaging like email currently being sent manually as well as automated through Journeys. Can you outline examples for all types of sends?

**Answer:** Yes. We manually send our monthly newsletters and targeted e-blasts, as well as automated reminders and confirmations via journeys.

1. Is there an extensive message review process that needs to be factored into the build?

**Answer:** Yes, the communications team will review the content for all messages.

1. Will there be a need to handle marketing and operational/regulatory emails in SFMC?

**Answer:** There will be no need to handle marketing.

30. Do you have email, landing page templates? Do you have an Email/landing page design system or is the code full HTML?

-How many email templates do they currently have/use? We have approximately five email templates.

-How many landing pages/templates? We have one general template.

**Answer:** We have a graphic designer who will provide the art for the templates.

1. How many existing cloud pages do you currently use and break them down by type (general content, form, handlers, etc.)?

**Answer:** We have one general CloudPage template we use to collect data.

1. If using forms do you use smart capture or custom form builds?

**Answer:** We use Smart Capture.

1. Do you have existing cloud page templates?

**Answer:** We have one general template.

1. Do you currently use out of the box reports or custom via Marketing Cloud data views?

**Answer:** No, we only use Analytics Builder.

1. Do you have an automation built to capture daily data from Marketing Cloud data views?

**Answer:** No, we do not.

1. Other metrics: does that include metrics from SMS, cloud pages visits and other mediums?

**Answer:** We use Analytics Builder to see SMS and email metrics.

1. What is the intended medium for reporting (Excel file, Salesforce report/dashboard, BI tool, etc.)? Does reporting need to be automated or manual, and what is the frequency (daily, weekly, monthly)?

**Answer:** We do monthly reporting on email and SMS and use Analytics Builder.

1. How many data extensions currently make up the data model and what is their relationship?

**Answer:** We have approximately 45 folders that contain data extensions and we have used these to send emails and SMS messages.

1. Do you have an existing data flow diagram that covers the data architecture, and/or an existing data flow diagram related to the management of the subscriber status (breakdown of ways a job seeker can unsubscribe/subscribe, systems updated based on subscriber status change)?

**Answer:** No, we do not.

1. Is the scheduler going to be integrated with Outlook/Google calendars? Or, any external websites?

**Answer:** Scheduler will be integrated with our jobseeker portal as well as the Detroit at Work website.

1. Has skill type, work type for matching up appointments been implemented? If not, do you plan to implement?

**Answer:** This has not been implemented yet.

1. Will you be using bots or text message for scheduling appointments?

**Answer:** No, we use Salesforce Scheduler.

1. Would there be any shared calendars?

**Answer:** We will discuss with winning responder.

1. Do you intend to send reminders to booked appointments?

**Answer:** We already send reminders to jobseekers who book classes or tests with us.

1. How many journeys are currently active and how many new journeys are planned to be launched in FY 2024-2025?

**Answer:** We have approximately 21 active journeys. At present, we don’t have an estimation as to how many journeys we will need in 2024-2025.

1. Has DESC already acquired a short code & activated it for SMS?

**Answer:** Yes, we have already acquired this.

1. How many CloudPages does DESC plans to launch in FY 2024-2025?

**Answer:** We don’t know and can’t estimate how many CloudPages we’ll be asked to produce.

1. Are DESC using any other marketing technologies and platforms other than Salesforce Marketing Cloud?

**Answer:** No, we don’t currently use other marketing platforms.

1. How does DESC's current Salesforce Marketing Cloud platform interact with other systems?

Answer: Interacts with launchpad / data extensions

1. Are there any specific systems integrated currently with SFMC, for e.g., CRM, Database, or any specific integration scope/challenges?

**Answer:** LaunchPad, which houses our data, is integrated with Salesforce Marketing Cloud.

1. What sources of data does DESC currently leverage for DESC's marketing campaigns?

**Answer:** LaunchPad is our data source.

1. How does DESC segment DESC's audience for targeted messaging and personalization?

**Answer:** We segment in multiple ways, for instance, by zip code and career interest.

1. What is the primary source of the data and where does that data reside?

**Answer:** LaunchPad is our only data source.

1. How does DESC currently create and manage marketing content? Is the Content & Design of the template expected to be delivered by the vendor or would it be provided by DESC?

**Answer:** Content and design is not expected. The communications team will create the content and we have a graphic designer who can supply the art.

1. What challenges does DESC face in delivering personalized experiences to DESC's audience?

**Answer:** Extracting and integrating data into Salesforce/Marketing Cloud and deduplication of contact data.

1. What project management tools or platforms does DESC's team currently use for managing projects?

**Answer:** We will discuss with winning responder.

1. Who are the key stakeholders involved in this Salesforce Marketing Cloud project? How does DESC plan to engage and involve stakeholders throughout the project lifecycle?

**Answer:** The key stakeholders are the communications team who will be involved in this entire project.

1. What specific learning objectives does DESC hope to achieve through the training and enablement activities for Salesforce Marketing Cloud?

**Answer:** Learning how to integrate lists from LaunchPad to Salesforce Marketing Cloud, learning the capacities in which we need to employ SQL to extract data, learning how to de-duplicate contacts ourselves.

1. What is the current level of familiarity and expertise with Salesforce Marketing Cloud among DESC's team members?

**Answer:** We are familiar with how to build CloudPages and emails in Content Builder.

1. Are there any specific roles or user groups that will require training on the platform?

**Answer:** The Digital Coordinator and Communications Specialist will require training on the platform.

1. What ongoing support mechanisms does DESC need to ensure successful implementation and utilization of journeys and analytics capabilities?

**Answer:** Support importing data from Launchpad to Salesforce Marketing Cloud and troubleshooting support in case there is something preventing the journey from being executed. De-duplication of contacts in Salesforce Marketing Cloud.

1. What are the key pain points or challenges DESC face in managing campaign schedules and timings?

**Answer:** The import of data to Salesforce Marketing Cloud.

1. Can DESC provide examples of the types of campaigns DESC typically schedule (e.g., email newsletters, social media posts, SMS messages)?

**Answer:** We schedule email responses when a jobseeker signs up for a test or meeting with a career center. We will share example with winning responder.

1. What are DESC's expectations regarding ongoing support for DESC's Salesforce Marketing Cloud instance? What are the critical functions or processes within Salesforce Marketing Cloud that require ongoing maintenance and support?

**Answer:** The de-duplication of contact records in Salesforce Marketing Cloud require ongoing maintenance and support.

1. Does DESC require proactive monitoring and maintenance services to ensure the health and performance of DESC's Salesforce Marketing Cloud environment?

**Answer:** Yes. We need proactive monitoring of contacts, super message usages, and any technical errors.

1. Are there any compliance or security requirements that need to be considered in providing ongoing support for DESC's Salesforce Marketing Cloud instance?

**Answer:** We will discuss with winning responder.

1. What are DESC's preferred response times and service level agreements (SLAs) for resolving support requests related to Salesforce Marketing Cloud?

**Answer:** We prefer for email requests to be answered within one working day and Teams or SMS questions to be answered within 2 hours.

1. Is DESC looking for 24/7 Support for SFMC instance? Are they open for Onshore/Offshore delivery model, or all the resources are required to be in U.S.?

**Answer:** It is very unusual for support to be requested outside of work hours. As long as all requirements stated in the RFP are fulfilled, all responders will be evaluated.

1. Can DESC describe the types of content DESC currently produces or plans to create (e.g., blog posts, email newsletters, social media updates)?

**Answer:** We create digital content that exists on paid and unpaid media platforms.

1. How do DESC envision leveraging Salesforce Marketing Cloud to enhance DESC's content strategy and achieve DESC's marketing objectives?

**Answer:** We wish to leverage Salesforce Marketing Cloud to promote job opportunities, training opportunities, and barrier removal to Detroiters.

1. What is DESC's current process for creating and approving content?

**Answer:** The process involves asking the communications team to proofread and provide critical feedback in order for content to be modified until satisfaction and approval.

1. Who are the key stakeholders involved in content creation, review, and approval?

**Answer:** The communications team are the key stakeholders.

1. Are there any specific tools or platforms DESC uses for content creation and collaboration?

**Answer:** We use Adobe to create videos and graphics, and Facebook, Instagram, LinkedIn, and X for social media.

1. How does DESC plan to personalize content and tailor messaging to different audience segments within Salesforce Marketing Cloud?

**Answer:** We use data from salesforce to target creative when necessary (such as ZIP codes or industry experience)

1. Are there any dynamic content strategies or use cases DESC would like to explore (e.g., personalized product recommendations, dynamic email content)?

**Answer:** Not at present

1. Does DESC have data sources or attributes that can be used to personalize content for individual recipients?

**Answer:** We can personalize content in content builder using smart content, I believe.

1. What are the key challenges or pain points DESC face in tracking and analyzing customer journeys?

**Answer:** The import of data from LauchPad to Salesforce Marketing Cloud.

1. What tools or platforms does DESC currently use for journey analytics?

**Answer:** Analytics Builder in Salesforce Marketing Cloud.

1. Does DESC utilize Datorama/ Litmus/ Google Analytics for Analytics, Reporting, and testing?

**Answer:** No, we only use Analytics Builder.

1. Does DESC prefer in-person or remote or recorded knowledge sessions?

**Answer:** Recorded knowledge sessions and virtual meetings work best for us.

1. Does DESC have a cloud-based document management platform to manage knowledge base?

**Answer:** No, not at present.

1. The scope of work includes the development of additional templates. Speaking of email templates, how are you currently managing them? Are you using the drag-and-drop editor or you are preparing HTML code or both approaches? Do you plan to provide the contractor's team with figma designs or HTML code or it will be delegated to the contractor's team as well?

**Answer:** We use the drag and drop editor. We have a graphic designer who can help design the template parts. We will share examples with winning responder.

1. By reviewing your existing journeys to improve engagement do you consider only technical optimization or business consulting as well?

**Answer:** We generally consider technical optimization.

1. In other requirements you mention the contractor will do development. What kind of development are you looking for? Do you expect to integrate with more communication channels? Do you have requirements for a technology stack to be used?

**Answer:** We would need help to develop complex journeys in the future.

1. To propose the most accurate timeline, how many new journeys would you foresee within a 1-year contract?

**Answer:** We can’t determine that at this time as journey requests are as needed throughout the year.

1. What channels do you use to reach the audience?

**Answer:** In the context of Salesforce or in general? In addition to Marketing Cloud, we use social media, bought media, and PR channels. We also run events in the community,

1. Who are the target audience and how are they segmented?

**Answer:** Detroiters are our target audience, and they are segmented in various ways but primarily by career interest and zip code.

1. Are there any specific challenges you’re facing with your current setup?

**Answer:** No, we don’t have specific challenges right now with the set up.

1. What are the success metrics for email marketing campaign?

**Answer:** Are email open rate is 25% on average and our click rate is 1.5% on average which is above industry standard for recruiting and staffing email campaigns.

1. Is there an existing CRM connection in place with the marketing cloud? Details?

**Answer:** Salesforce Marketing Cloud is connected via Sales Cloud to LaunchPad which houses our data.

1. What is the primary source of data you use for marketing campaigns?

**Answer:** We use LaunchPad which houses all of our data.

1. Do you use external data sources in your marketing cloud? Which ones?

**Answer:** We only use LaunchPad which houses our data.

1. What kind of information do you collect on Cloud Pages?

**Answer:** We collect name, email, phone number, date of birth, and location.

1. What are your needs for personalized email messages for your audience?

**Answer:** We need help with smart content that shows the person their preferred name, for instance.

1. How do you generate and analyze reports about your email campaigns?

**Answer:** We utilize Analytics Builder.

1. How many people in your team use Salesforce Marketing Cloud?

**Answer:** Four people on our team use Salesforce Marketing Cloud.

1. Do you have different business units in your marketing cloud? What are their purposes?

**Answer:** No, it is the communications team who uses this primarily.

1. Do you use scoring models to rank your prospects? Do you need new ones?

**Answer:** No, we don’t use scoring models.

1. What are your needs for sending out announcements via email?

**Answer:** We need help troubleshooting any technical errors such as display issues.

1. Can you show us some templates of email messages you currently use?

**Answer:** The awardee can see the templates we use upon contract execution.

1. Is the Salesforce Marketing environment described in the Scope of Work section already in production? If yes, we read this RFP as asking for professional services to support, enhance, and extend this application stack over time. Is this a correct interpretation of the ask? If not, please clarify.

**Answer:** Yes, the Salesforce Marketing Cloud environment is already in use.

1. Are there any pre-existing business requirements or projects that will need to be delivered in the first three months of the engagement? If so, what are they?

**Answer:** We will need a de-duplication of contacts in Marketing Cloud and a report of how many contacts we currently have, if we are at the limit.

1. How many distinct stakeholder groups will be involved in defining the initial project requirements?

**Answer:** It will be the communications team.

1. How many users will be using Marketing Cloud? Please provide an approximate count by role, if possible.

**Answer:** There will be approximately four users.

1. Does DESC seek only Salesforce Marketing Cloud savvy technical resources through this RFP? Does DESC anticipate that the successful vendor will also supply business analysts and other purely marketing business savvy resources through this RFP?

**Answer:** We only seek Salesforce Marketing Cloud resources. We do not require business analysis and marketing analysis.

1. Is this RFP intended to extend or replace an existing team of resources already providing the same services?

**Answer:** All RFP responses will be judged without reference to any previous contract relationships.

1. What is the composition of the existing Salesforce Marketing team? We are looking for a count of resources by role.

**Answer:** We have approximately four team members that work in Marketing Cloud.

1. Is there an incumbent third-party partner already providing these services to DESC?

**Answer:** All RFP responses will be judged without reference to any previous contract relationships.

1. Assuming the scope of work is changes, fixes to an existing SFMC production org: What is the volume of requests that you receive on a monthly basis? Can past request history (say last 6 months) be shared? Are there SLAs for responding to these requests?

**Answer:** The volume of requests depends. The awardee can receive past request history.

1. Approximately how many campaigns are executed on a daily/weekly basis today? How many templates are currently active?

**Answer:** We have approximately 21 active running journeys and approximately five templates in use in content builder.

1. What has been the historical rate of growth of such templates? In other words, how often is a new campaign typically launched? Once per week/month/quarter?

**Answer:** We have campaigns typically launched monthly.

1. Does DESC staff provide mock-ups and details needed to create templates in Marketing Cloud such as images, color scheme, etc.?

**Answer:** Yes. We will provide the visual content.

1. Salesforce Journey Builder is already in active production use, yes?

**Answer:** Yes.

1. Salesforce CloudPages are already in active production use, yes?

**Answer:** Yes.

1. Salesforce Scheduler is already in active production use, yes?

**Answer:** Yes.

1. Do you already have CloudPages built for *data collection*? Or should these be planned to develop and implement from scratch?

**Answer:** Yes, we have already built CloudPages to collect data.

1. What Salesforce platforms, modules, and managed packages/AppExchange are already available in the current environment? Are any of these supported by a different team?

**Answer:** We will discuss with the winning responder.

1. We assume that content (digital assets like pictures, style guides for HTMLs - email as pages, copy of email body etc.) will be provided by DESC. Please confirm this assumption.

**Answer:** Confirmed.

1. Are relevant data models documented outside of Salesforce itself? Are they only currently accessible via the embedded Salesforce Schema Builder?

**Answer:** No, we only use Salesforce.

1. Are Career Center appointments scheduled within the Salesforce environment itself? Or does this happen through external applications that integrate with Salesforce?

**Answer:** This happens through Salesforce Scheduler.

1. Is the current Marketing Cloud instance stand alone? Or is it integrated with the wider Salesforce landscape at DESC?

**Answer:** Marketing Cloud is integrated with LaunchPad which houses our data.

1. Please provide more information on your release management process. Release planning; frequency, size Any specific release management and / or DevOps tools.

**Answer:** We will discuss with the winning responder.

1. Are there any integrations with external systems from SMFC? If yes, please provide details about the external system/application, technology, current integration method, and whether they are bi-directional?

**Answer:** Yes. Salesforce Marketing Cloud is integrated with LaunchPad which houses our data.

1. How many private IP addresses are currently defined and operational?

**Answer:** We will discuss with the winning responder.

1. The scope of work mentions email and SMS channels. Are there any other communication channels also being employed or planned?

**Answer:** No, we only use email and SMS on Salesforce Marketing Cloud.

1. What are the pain points in the existing setup/architecture? Are there any specific areas where you visualize tangible improvements are needed?

**Answer:** We need help de-duplicating contacts. We need to figure out a way to not import duplicate contacts.

1. Are all reporting done within the Salesforce environment? Or are we feeding data into other external reporting tools? If yes, which are the tools currently in use?

**Answer:** All reporting is done with Analytics Builder.

1. What is the tool used by DESC for knowledge base?

**Answer:** We will discuss with the winning responder.

1. With regard to Knowledge Transfer and Training: How many users currently use Marketing Cloud instance? What is their relative level of expertise on Marketing Cloud. Will in-person training be required? Are users to be trained in one location or multiple locations?

**Answer:** The digital communicator and communications specialist have some knowledge of Salesforce Marketing Cloud. In instances where winning responder provides consultancy, it would be good to have some way of storing a video showing how certain tasks are completed.

1. What is the extent of QA roles that DESC expects from the provider? For example, will DESC have end-users available to do E2E functional testing before go-live?

**Answer:** For example, Journeys need to be tested by a few people before going live. Same thing with CloudPages. We need to make sure things work before we use them.

1. Do you have other teams for QA, or will the team be responsible for all phases of QA (except UAT)?

**Answer:** The team will be responsible for QA. We don’t have a QA team at present.

1. How does DESC plan to execute the project? Waterfall or Agile methodology? If Agile, does DESC plan to have committed resources for this initiative in the roles of product owners that can make decisions, help manage the backlog, drive sprint cadences, etc.?

**Answer:** We will discuss with the winning responder.