



Request for Qualifications: Salesforce Implementation

Issuance Date: July 9, 2020

Response Deadline: July 22, 2020

Background

East Bay Community Energy (“EBCE”) is a Joint Powers Authority (“JPA”) originally formed on December 1, 2016 in the county of Alameda, California, to provide Community Choice Aggregation (“CCA”) services for its member jurisdictions. EBCE is governed by locally elected public officials and is designated as the default electricity supply provider for the jurisdictions it serves.

EBCE’s mission is to provide cleaner and greener energy, at rates that are lower than default supplier options. EBCE also reinvests its earnings back into the community to create local green energy jobs, local programs, and clean power projects.

EBCE currently serves customers in many jurisdictions in the County of Alameda. It will soon expand to even more cities in Alameda County, as well as the city of Tracy in San Joaquin County.

EBCE currently provides service to over 550,000 customer accounts, representing a population of over 1.3 million people, 50,000 businesses, and approximately 6,000 gigawatt hours (“GWh”) of annual load. By 2022 EBCE estimates it will serve an estimated 628,000 customer accounts across all jurisdictions, representing a population of over 1.5 million people and a combined load of 7,200 GWh/year.

In general, CCAs procure and sell electricity on behalf of their constituent jurisdictions, acting as default wholesale buyers of electricity, instead of the incumbent utility. As part of their operations, CCAs manage interactions with the customers, have access to all customer usage and billing data, calculate billing charges for inclusion in consolidated billing (as managed by the local utility), operate a call center and account services, and design, implement and evaluate a number of electricity related marketing programs.

Objective

Through this RFQ, EBCE is seeking expressions of interest, qualifications, and budgetary estimates from qualified and preferably local organizations that can provide Systems Integration (“SI”) services to assist EBCE with implementing Salesforce.

EBCE separately intends to execute a Master Subscription Agreement with Salesforce, Inc. for Customer Relationship Management services. The specific details on the Salesforce subscription services are below.

Salesforce Services

License Term: Annual, starting on 8/15/2020

Products Licensed: **Service Cloud**, Enterprise Edition, 30 users

Pardot Plus / 4 Custom Objects, up to 600K Contacts

EBCE Data Summary and Use Cases

EBCE currently manages a central repository of customer data in a warehouse built on BigQuery in the Google Cloud Platform (GCP). This warehouse is updated daily with customer data from a variety of sources. EBCE is now planning to subscribe to Salesforce services to execute on several discrete use cases related to this data:

- 1) **Create a central repository in a CRM** for customer related information so as to have the CRM act as a central system of record for customer data. Currently CRM data lives in BigQuery and consists of, but it not limited to:
 - a. Customer characteristics (name, address, enrollment details)
 - b. Customer electricity usage summaries
 - c. Customer billing summaries
 - d. Internally derived customer metrics (usage intensity, etc.)
 - e. Third party customer data (tax assessor, google sunroof, etc.)
 - f. Customer program participation
- 2) **Enable** the Marketing and Account Services & Local Development Programs teams to **identify leads, create campaigns, manage communications, and track customer activity** as they journey through various marketing programs:
 - a. Create / Manage campaigns based on filtering on various criteria
 - b. Create and manage customer communications (mostly via email)
 - c. Create landing pages and/or process data from online enrollment forms
 - d. Track leads through customer journeys
 - e. Exchange information with third party program implementers
- 3) **Store key CRM data back into BigQuery** as necessary and on an as-needed basis;
- 4) Integrate with **Granicus** govDelivery (Details TBD).

Please note the following key considerations:

- EBCE currently does not offer an online customer portal. At most, the EBCE website will host landing pages or enrollment forms that will interact with the CRM, but there is no need for complex portal integration or authentication.
- EBCE currently manages all data via nightly batch file processes and is expecting that the integration between its internal data warehouse and Salesforce and/or potential external third parties also follow that model, rather than a more complex 'real-time' API integration for data exchange (at this time).
- There is currently no use case for the integration of the CRM with a call center or other customer service management system. These integrations will be performed at a later date and are out of scope at this time.
- Marketing activities will all be performed against known service recipients in EBCE's service territory. As such, all current or potential customers are already known to EBCE. Therefore, there is very little emphasis on traditional lead generation or a focus on external customer growth.

Services Sought

At this stage, EBCE seeks system integration services and support in four primary areas:

- 1) Review of the existing EBCE Data Model (as configured in GCP BigQuery) to determine proper configuration of Salesforce services to ensure compatibility with the EBCE Data Model – and/or recommendations for data model adjustments;
- 2) Assist with setting up the initial configuration of the Salesforce services and initialization of the Salesforce systems;
- 3) Assist with developing, testing and scheduling data integrations between GCP and Salesforce. Note that EBCE is not looking for a full turnkey integration, but rather assistance with the initial development of these integrations;
- 4) Identify and document best practices for the administration of the Salesforce system once initial implementation is complete.

Qualifications Sought

EBCE is looking for qualifications from companies that can perform the services described above for the given use cases and data landscape. Consideration will be given to the following qualifications:

- Experience performing the services sought, in particular experience with BigQuery and GCP integrations, including nightly batch file processing;
- Experience with the energy industry, and the electricity sector in particular;
- Local presence preferably local HQ (Counties of Alameda, San Joaquin, or the greater San Francisco Bay Area);
- References for similar work (anonymous is acceptable for the purpose of RFQ);
- Cost-Effectiveness (EBCE has a maximum budget of \$70K for these services, and is looking to be as cost-effective as possible);
- Ability to start providing services with minimum delays.

Instructions for Submission

Interested parties are asked to submit a qualifications package, including a budgetary estimate (an estimated range is acceptable) by 7/22/2020, by sending an email to taitlaoussine@ebce.org.

EBCE will review the qualification packages received and request more formal proposals from those parties it deems qualified, at its sole discretion.

EBCE may consider qualifications submitted before or after the posting of this RFQ and/or the above deadline, at its sole discretion.