Questions and answers
94747_ Salesforce Professional Services

- Have you already implemented Salesforce CRM (Sales or Service)? No, this is the scope of this TOR
- Have you already implemented any Marketing Cloud instance? Is this instance connected and synchronized with Salesforce CRM? No
- What is the expected scope for the Project? To implement Marketing Cloud from scratch or update a current implementation? Use Salesforce Marketing Cloud adapted to our needs
- What kind of dashboard are you looking for to be implemented in Marketing Cloud? Why in Marketing Cloud? Are you open to different options? For example, all engagement data could be synchronized from Marketing Cloud to Salesforce CRM and then you could use that data in Salesforce reports and dashboards. This needs to be discussed with the selected vendor
- How many users will use Salesforce CRM and Marketing Cloud? What kind of users (internal or external)? 16
- In marketing cloud do you expect a campaign implementation as a part of project scope? With campaign implementation we mean at least target Group creation, digital assets configuration (email and SMS templates), journey building, among other tasks. Yes
- What is the objective of integrate Salesforce CRM and Marketing Cloud with Office365, Teams and Click-up? Smooth working systems working together
- What do you mean by "applying metadata for cross-referencing"? In each partner file we would like to add specific fields/metadata including, but not limited to, a partner's societal sector, region, country and specific SDGs which a partner is working to implement.
- With what existing collaborations spaces should we integrate? Sharepoint, Teams, click-up, Office365
- For how many People do you need the training? 16
- What is the specific scope for integration of Workstreams from Salesforce with other systems? We would like to add Outlook emails to salesforce files with one click. We would also like to view a partner's email history from their file within Salesforce. Additionally, we would like to explore options for integrations with SharePoint and ClickUp.
- When we talk about 'Advise the project group on using Salesforce with click-up and other document management systems, are we talking about additional trainings or specific deliverables to provide? Training and advise
- Are there any requirements in terms of project management and/or implementation methodologies? Any Testing requirements or tools to be used? This needs to be discussed with the selected vendor
- What is the scope for Salesforce CRM configuration for the Campaign? This needs to be discussed with the selected vendor and depends on the estimated work hours needed suggested by the selected vendor. Exact customization needed is unknown till the selected vendor has a detailed look into it
- How can we ensure that scope will be according to budget limitation? So far, it seems difficult to provide estimation based on current expectations. The scope is laid out in the TOR
- In case the requirements gathered after speaking to the client overcome this budget, how should we proceed? This will be discussed with the vendor selected

- Do you expect to have sales and mkt configured and ready to go in one moth? Our approach might be more to analyse your requirements during this first month, then proceed with implementation. Yes, the plan is to have it up and running in one month
- How many Campaigns are you planning to implement? If is not decided yet...is it more than one? The name of our UN entity is SDG Action Campaign we are not implementing several campaigns
- Will we be focusing on out-of-the-box functionality, or you expect additional customisation? This is described in the TOR
- Is there a PM already assigned to this project on your side? As described in the TOR there is a project group
- 1 month Plan means to us: 1 week Reqs. gathering, 1-2 weeks implementation of Salesforce MKT, Sales, Campaigns creation, integration with other systems, 1 week testing, change management, training and go-live. Is 1-2 weeks implementation a the expected timeline for the scope planned from your side? If it is not what you have in mind, can you please provide us with some more clarity here? This will be discussed with the vendor selected
- Is there any requirement of data migration? if yes, what is the volume of data and systems from where the data needs to be imported? 1.   Need to migrate a list of 90,000+ email contacts from Mailchimp – One time
- What is the scope of work for Salesforce integration with Office 365, Outlook, Teams, Clickup and SharePoint? Ability to automatically create new partners through Outlook and any other integrations available out of the box
- What licenses have been procured for Salesforce and Marketing Cloud? Advice the UN SDG Action Campaign on type and number of license required
- Does the project deadline of 15th August also include training, or it will be done post 15th August after implementation? Training will be done after implementation (After 15 August)
- What is the volume of emails to be sent using Marketing Cloud? A bi-weekly newsletter to all 90K+ subscribers and other emails as programmed