

Incapsulate Quote for **City of Fresno Council CRM**

incapsulate

July 2023

Fresno | Council CRM Implementation Overview

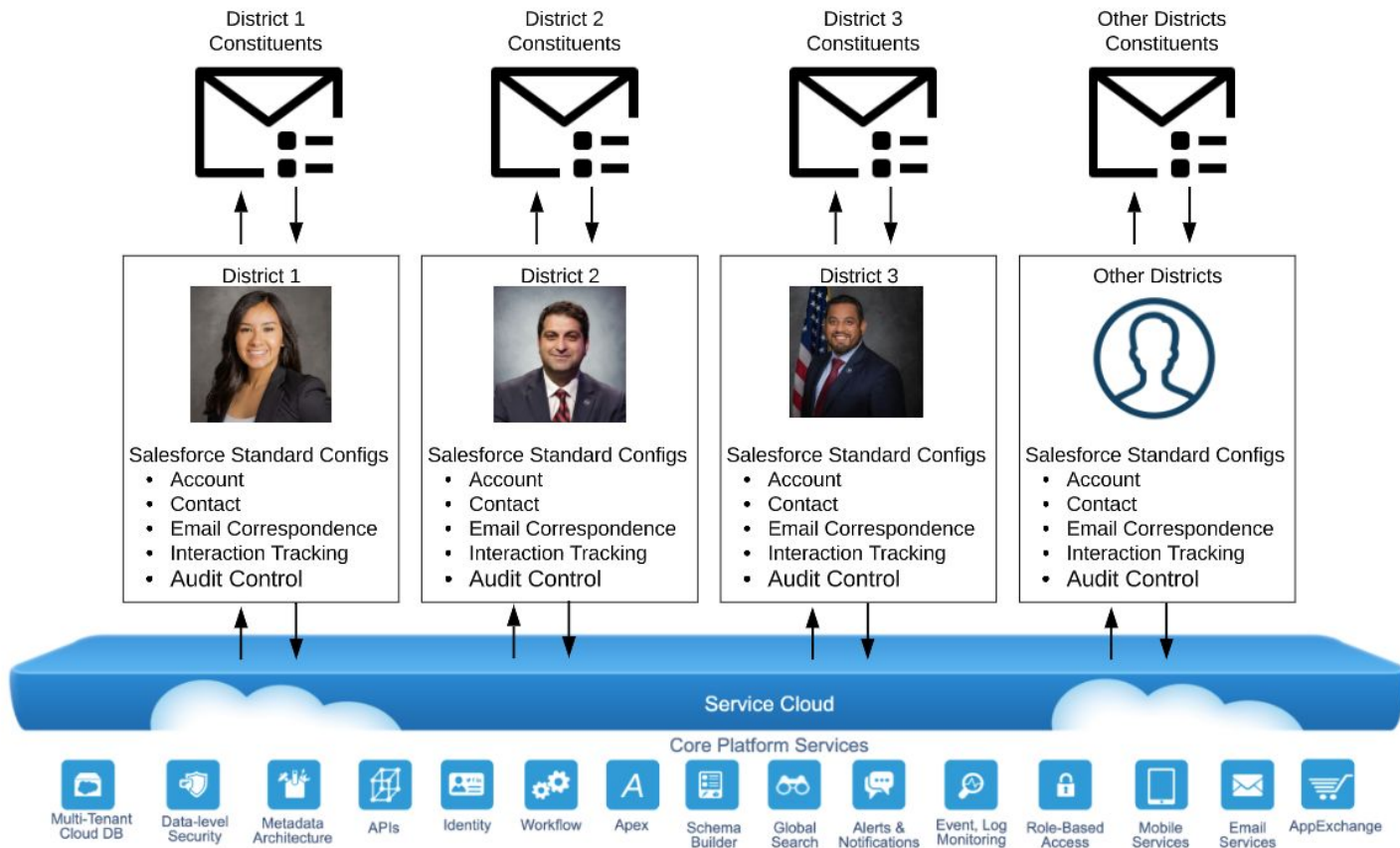
Scope: Fresno City Council receives a number of questions, issues and complaints on the phone and via email. The Council would like to implement a Customer Relationship Management (CRM) System to effectively manage email interactions with their constituents. Incapsulate can provide this Solution using the Salesforce Service Cloud Platform

Project Details:

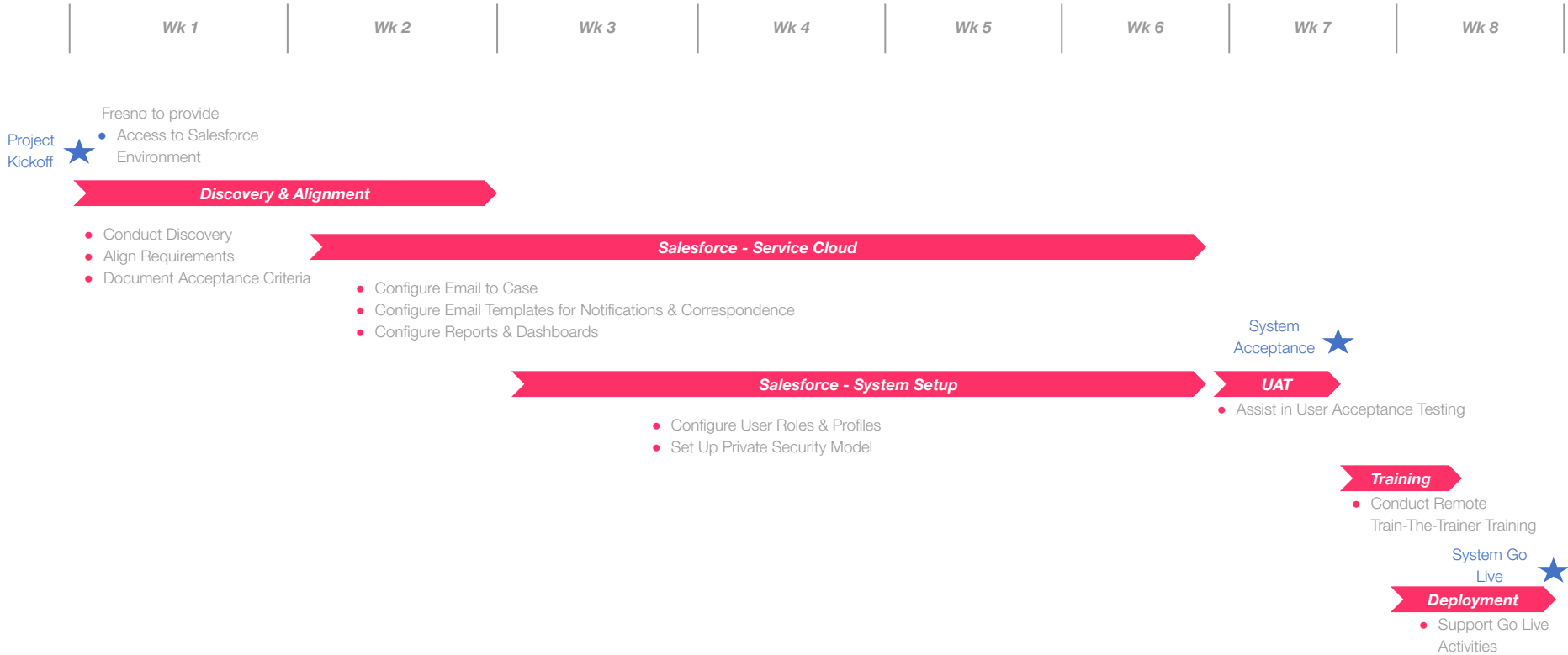
- Setup Salesforce Service Cloud
- Configure Email to Case
- Configure User Security
- Configure Case Management
- Configure Reports & Dashboard

Timeline: Production Ready in Eight (8) Weeks

Fresno | Council CRM Architecture



Fresno | Council CRM Timeline



Fresno | Council CRM User Stories Details (1 of 2)

Category	Type	User Story	Details
Salesforce Setup	Initial Setup	Setup of new SFDC Service Cloud Instance	
	Security	Configure Profile	Council/workers Portal Users
		Configure Role	2 Roles per district
		Configure Org Wide Default Sharing rules and record visibility	For Cases - each district to only see their Cases
		Set up of Org Wide Emails	1 Email per district
Analytics	Dashboard	Configure a dashboard that includes 4 reports	One standard Dashboard with the 4 reports that will be configured and cloned for each council member.
Integration	Address Validation	Validate address against City Database	City to provide access to city official address repository

Fresno | Council CRM User Stories Details (2 of 2)

Category	Type	User Story	Details
Salesforce Configuration	General Functionality	Account and Contact management	
		Contact/Account Duplicate process	
		Email Template	Estimated 10 Email templates (HTML based)
		Email Alert	Emails auto sent on creation and closure
		Apps	1 App for the Councils to share
		Page Layout	Cases, Accounts, Contacts
		Lightning Record Page Configuration	Cases, Accounts, Contacts
		Validation Rule	Estimate 5 validations on the Cases Estimate 3 on Contacts and Accounts
		List Views	for Cases, Contacts and Accounts estimate total of
		Enable Chatter	internal purposes only
		Email to Case	7 Routing Rules for Email
		Case Management	Support Process to manage the lifecycle of Cases, 1 Record Type for all Cases

Fresno | Council CRM Implementation Cost

Type	Category	Price *	Notes
One Time	Incapsulate Professional Services	\$149,638.50	Implementation of CRM
Total (Professional Service)		\$149,638.50	
Annual	Optional Managed Services	\$5,000.00	Application Support for bug fixes only provided by Global Support Team
Total (Optional Managed Service)		\$5,000.00	
Total (Professional & Optional Managed Service)		\$154,638.50	

* Excludes any Contract Vehicle Uplift and Salesforce License Cost

Fresno | Council CRM Payment Schedule

Type	Date	Price *	Deliverable
Incapsulate Professional Services	Project Kickoff	\$75,498.57	Implementation Plan
	Month 1	\$45,482.51	Requirements Traceability Matrix
	Month 2	\$28,657.42	UAT Approval
Optional Managed Services	Project Kickoff	\$5,000.00	Project Kickoff Meeting

* Excludes any Contract Vehicle Uplift and Salesforce License Cost

Fresno | Key City Responsibilities

- Fresno will provide timely access to Council staff and Subject Matter Experts (SMEs)
- Fresno will provide all necessary licenses at Project Kickoff
- Resolution of issues by the City in three (3) business day will allow implementation to remain on target
- Fresno will provide the necessary administrative and security access to enable Email to Case Functionality from the Council website
- Fresno will provide System acceptance one (1) business day after UAT
- Fresno will provide End User Training
- Fresno will be responsible for any Business Change Management activities

Fresno | Council CRM Key Assumptions

Public Web Portal	<ul style="list-style-type: none"> • Out of scope
Data Migration	<ul style="list-style-type: none"> • Out of scope
Integration	<ul style="list-style-type: none"> • Integration limited to address validation only • Assumes city will provide necessary address repository to validate addresses, Incapsulate not responsible to maintain the repository • Integration with any other external system is out of scope, for example Telephony, GIS for reporting, MailChimp and SurveyMonkey
Web Portal & Mobile App	<ul style="list-style-type: none"> • Out of Scope
Standard Reports & Dashboard	<ul style="list-style-type: none"> • Only One (1) Dashboard with up to four (4) reports will be configured and cloned for each council member. Changes to cloned reports are not in scope • Location and map related reporting will be done by the City GIS team and not through Salesforce
Train-The-Trainer	<ul style="list-style-type: none"> • Up to Six (6) one hour remote train the trainer training sessions • End user training, change management and rollout support is not in scope
System	<ul style="list-style-type: none"> • Project will be delivered remotely by a blended Onshore and Offshore Team • System will be delivered in a new Salesforce org and all licenses will be available at Project Kickoff • Configuration only. custom development is not in scope • All Salesforce limits apply. Compatible with n-1 browser versions • Fresno will be responsible for providing required access to external systems • Campaign, Newsletters, Mass Email Communication will be managed in Mailchimp or SurveyMonkey and not in Salesforce. • Setting up OmniChannel, Chat, Chat Bot, Text Bot etc are out of scope • 7 email address for council will be routed into Salesforce, Email addresses are accessible by the client to set up forwarding rules • Standard address validation with coordinates included
Managed Services	<ul style="list-style-type: none"> • Incapsulate Hyper Care not included in quote • Application Support will be provided by a blended Onshore (20%) and Offshore (80%) Team
Deployment	<ul style="list-style-type: none"> • Incapsulate will deploy the system into production • Fresno Team will be responsible for providing the necessary admin access • Plan assumes a 2 week discovery, SME and client resources are available during this discovery period • Plan assumes 2 weeks of UAT and Go Live, assumes client resources to complete UAT • Developing online forms is out of scope
Documentation	<ul style="list-style-type: none"> • Standard Salesforce documentation will be provided • Custom documentation is not in scope

Thank You

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