

Proposal Development Worksheet

Writer's Information

Relevant Proposal Information		Relevant RFP Locations	
Proposal	FEMA RFP 7010BR000016	Instructions (L*)	L.5.2, p9
Volume and Section	Section 2	Evaluation Criteria (M*)	M.3, p13
Section Title	Factor 2: Transition Approach	Statement of Work (C*)	
Number of Pages	12	Deliverables (F*)	
Number of Visuals	4	Data (CDRLs*)	
Other Information		Attachments	
Author	A. Student	Other RFP References	

**Section in a Federal RFP*

Section Compliance Checklist

RFP Paragraph	Compliance Requirement
L.5.2, M.3	Describe your company's approach to the transition phase and specifically address the following in your response:
L.5.2, M.3	Sub-Factor 1: Transition Methodology: Describe how your transition methodology and approach will be tailored to this initiative in a public sector environment.
L.5.2, M.3	Sub-Factor 2: Transition Plan & Resources: Outline in general terms how you will commence operations if you are awarded the contract.
L.5.2, M.3	Transition Plan & Resources: Outline in general terms how you will commence operations if you are awarded the contract.
L.5.2, M.3	Provide an organization chart for your transition team, identifying roles of key resources.
L.5.2, M.3	How many of the resources involved during transition will also form part of the on-going service delivery team? What are their responsibilities in each phase?
L.5.2, M.3	Sub-Factor 3: Transition Experience: Provide details for two (2) transition efforts, indicating similarities to the anticipated ESG transition:
L.5.2, M.3	1. Overall description of the transition requirements
L.5.2, M.3	2. Transition methodology used
L.5.2, M.3	3. Knowledge transfer requirements
L.5.2, M.3	4. Size of the transition
L.5.2, M.3	5. Establishing/readying delivery/service centers
L.5.2, M.3	6. Any unplanned downtime
L.5.2, M.3	7. Did the transition involve training resources?
L.5.2, M.3	8. Was the transition completed within the budget and original schedule? If not, explain.
L.5.2, M.3	Transition Lessons Learned: Based on the above two (2) transition efforts, provide three (3) lessons learned for each and how they will be applied to the anticipated transition. (Maximum points for three relevant lessons learned for each example that can be applied to the anticipated transition).
L.5.2, M.3	Sub-Factor 4: Transition Risk Management: Provide an overview of the significant challenges experienced during a typical transition, from a client's own in-house services. (This could be, but does not have to be, one of the two client examples above).

Section Compliance Checklist

RFP Paragraph	Compliance Requirement
L.5.2, M.3	Describe how the challenge was addressed and applicability to the anticipated ESG transition.
L.5.2, M.3	Sub-Factor 5: Change Management and Communication Plan: What steps does your organization take to communicate and prepare ESG for the transition?
L.5.2, M.3	Identify what support you need from ESG for the successful execution of your proposed transition plan.
L.5.2, M.3	Include what ESG support is needed to train new associates, (e.g., on-site trainers).
L.5.2, M.3	What travel requirements will exist for ESG's trainers? How long would you recommend they be on site?
L.5.2, M.3	How many and how frequently should subsequent visits be scheduled?
L.5.2, M.3	What type of support is needed and/or recommended by you for ESG's management/trainers after the initial transition is complete?

Section Outline (Based on Requirements of RFP)

Section Number	Section Title
2.2	Factor 2: Transition Approach
2.2.1	Subfactor 1: Transition Methodology
2.2.1.1	Methodology Tailored to the Environment
2.2.2	Sub-Factor 2: Transition Plan & Resources.
2.2.2.1	Commencement of Operations
2.2.2.2	Schedule of Transition Activities
2.2.2.3	Organization Chart
2.2.2.4	Roles and responsibilities of Key Resources
2.2.2.5	Transitioning Resources to On-site Delivery Team
2.2.2.6	Responsibilities and Resources by Transition Phases
2.2.3	Sub-Factor 3: Transition Experience
--	Summary of Transition Efforts
2.2.3.1	Transition Experience 1 – [Contract Name] – Include the following in a table <ol style="list-style-type: none"> Overall description of the transition requirements Transition methodology used Knowledge transfer requirements Size of the transition Establishing/readying delivery/service centers Any unplanned downtime Did the transition involve training resources? Was the transition completed within the budget and original schedule? If not, explain. Lessons learned and application to ESG transition
2.2.3.2	Transition Experience 2 – [Contract Name] – Include the following in a table <ol style="list-style-type: none"> Overall description of the transition requirements Transition methodology used Knowledge transfer requirements Size of the transition Establishing/readying delivery/service centers Any unplanned downtime Did the transition involve training resources?

Section Outline (Based on Requirements of RFP)

Section Number	Section Title
	8. Was the transition completed within the budget and original schedule? If not, explain.
	9. Lessons learned and application to ESG transition
2.2.4	Sub-Factor 4: Transition Risk Management
2.1.4.1	Overcoming Significant Challenges from In-House Services
2.2.5	Sub-Factor 5: Change Management and Communication Plan
2.2.5.1	Communications Plan Summary
	ESG Support Needed for Transition
	ESG Support Needed to Train New Associates
2.2	ESG Support Needed After Initial Transition is Complete

Relevant Proposal/Volume Strategies

- Account executive will relocate to customer location to oversee transition/project commencement.
- Core transition team will continue on with service delivery
- Low transition risk is demonstrated by a past performance, especially with transitions
- Multiwave transition approach to discern and apply lessons learned, minimize risk

Defining Your Solution

Major Issues

No negative impact on operations, seamless transition
Job security on current IT staff
Feasible methodology and approach (business and technical)– can be implemented within ESG’s organization and culture

Approach(es) to Requirements and Issues

2.2 Transition Approach

Initial ideas below to be fleshed out and expanded by the team and then mapped to the outline.

- Address implementation plan upon notice to proceed. Use graphic showing our phases with definition of responsibilities with emphasis on on going services team. Show typical response time and how issues are quickly resolved through the on site executive
- Show a transition schedule that is complete 30-60 days before Q4 to avoid impacts to Q4 revenues
- Discuss Vibrant's comprehensive transition planning workshops, scheduled and commencing immediately following contract award
- Name and commit to transition manager in the proposal.
- Provide a graphic of our org chart for this contract and define roles and responsibilities in associated text.
- Define roles and responsibilities, include a table, add a benefit column outlining the value each position/person brings
- Emphasize the knowledge gained by the transition manager during transition will be retained in the role of Continuous Improvement Director
- Clearly describe transition activities by location: headquarters, division or practice, region, and country
- Identify transition team members who remain as part of ongoing support—emphasize the on-site account executive and our ability to respond quickly with authority to act on behalf of Vibrant—this enables rapid problem resolution to maintain operability for customer
- Show how transition activity is tracked within Vibrant's transparent project management system and tools
- Describe the transition support specialists dispatched from Vibrant headquarters
- Link the transition resources (people/process) to our phased graphic

Features and Benefits of Your Solution

Features	Benefits	Important?	Unique?
On site executive	Early identification of issues and sharing lessons across deployment sites	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assistance from Vibrant exec	Rapid Vibrant response and resource deployment to identified issues/risks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Multiwave transition process with key decisions points and disciplined lessons learned process		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Follow-on support from Continuous Improvement Director. Emphasize early gains by integrating transition with selected transformation activities	Early gains include both cost reductions and revenue enhancements	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Key personnel on site and integrated with ESG	Efficient and faster implementation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Staffing credentials exceed industry standards	Pre-emption and rapid response to common and uncommon risks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Transition manager remains as Continuous Improvement Director	Able to hit target savings and process improvements quickly.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

Developing Your Section Messages

Section Discriminators

Us (Positives for Us)	Competitors (Negatives for Us)	Ghost?
On-site Account Executive	Omega – turnover risk	<input checked="" type="checkbox"/>

Developing Your Section Messages

Section Discriminators

Us (Positives for Us)	Competitors (Negatives for Us)	Ghost?
Direct management of transition Transition manager remains as Continuous Improvement Manager	Omega – new vendor partner, not worked together previously	<input checked="" type="checkbox"/>
Close collaboration with ESG via on-site AEs. Successful with past experiences		<input type="checkbox"/>
management approach through a dedicated account executive and experience		<input type="checkbox"/>

Risk Management

Risk Element	Management Approach
Difficulties with integration of SW/HW, training	Vibrant AE and executives on-site will catch any problems at inception
Knowledge gained during transition lost after completion	Transition manager remains as Continuous Improvement Manager of continuity of system
CRM modules may not integrate with customized platform	Stable app that's easy to implement, on site management available to address problems

Relevant Experience

20 years experience developing customized CRM solutions
Over 400 successful implementations globally
All personnel have the following certifications: Power Apps + Dynamics 365 Developer Associate, Dynamics 365 Sales Functional Consultant Associate, Dynamics 365 Marketing Functional Consultant Associate, Dynamics 365 Customer Service Functional Consultant Associate or the Dynamics 365 Field Service Functional Consultant Associate certification, Power Platform Functional Consultant Associate and the Power Platform Developer Associate certification.
In 200M transactions, no problem was due to Vibrant software

Past Performance

Vibrant helped Western Mountain Sports(WMS) increase sales locations to 950 and achieve 18% annual market growth.
Vibrant completed the transition within budget on original schedule, even with WMS adding 15 additional locations from an acquisition they completed one month after the start of project.

Section Messages

- Proven multi-wave transition process minimizes transition risks
- Only company to invest in providing an on-site executive with authority to act. This allows us to address issues immediately and resolve at the site location.
- In-depth experience with multiple CRM systems/platforms from more than 400 implementations
- Vibrant's software has exceptional performance history with over 200M transactions with zero issues

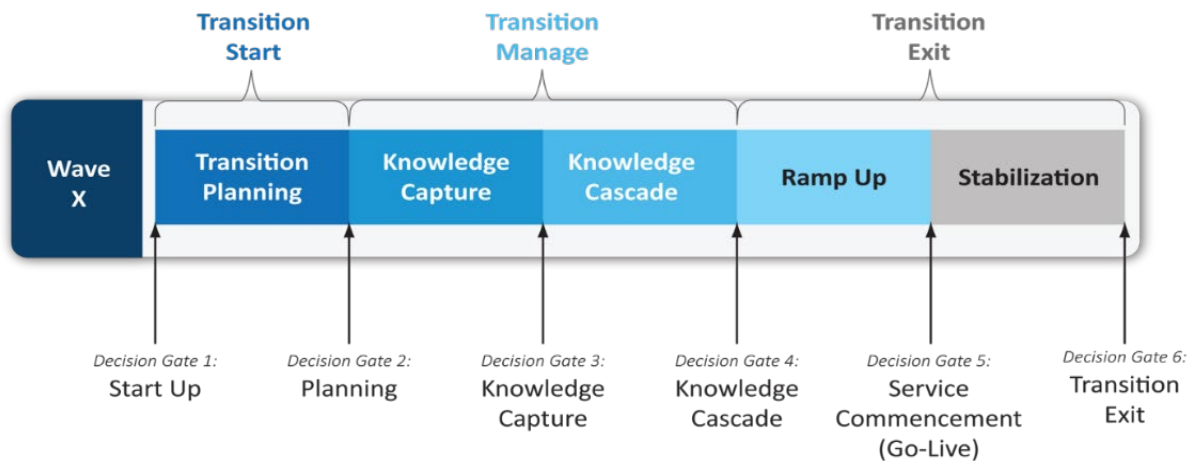
Section Theme Statement

ESG achieves a seamless transition, expansion of your CRM capabilities globally ,and a well trained workforce with on-going support from Vibrant’s on-site experts. Our CRM systems provide a low risk approach as identified in the February 2020 CRM Systems Journal’s recognition as “Most Stable application award for the past 5 years”.

Creating Key Visuals

To create visual, click in space below and use these options:

- **Copy** and **Paste** from another document
- **Insert Illustration** (choose **Picture**, **Clip Art**, **Shapes**, or **Chart**) or **Object**
- **Insert Table** and edit with standard techniques



Action Caption

Figure Number

Figure Title

2.2-1

Three-Phase, Multi-Wave Transition Process Reduces Risk.

Caption

By using Vibrant’s three-phase transition process rolled out in waves across ESG functional areas, ESG gains the benefits of controlled scope for each wave, a disciplined transition planning and implementation process that anticipates risk, and the application of lessons learned in initial waves to those that follow.