

# **Data Cloud DevOps Program RFP**

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This document is subject to the terms and conditions of the previously executed non-disclosure agreement with Salesforce. Any material that is submitted by the Supplier that is to be considered confidential in nature must be clearly marked as such in order for such material to be treated as confidential by Salesforce. All proposals submitted in response to this RFP become the property of Salesforce.

This document contains confidential material and ideas proprietary to Salesforce. The material contained herein is to be used exclusively for preparing proposals and presentations. This information may not be disclosed outside of Salesforce or the Supplier, nor may it be used for purposes other than for the preparation of the Supplier proposals.

# **1. RFP Introduction**

## **Overview**

Marketing Decision Science (aka “MDS”) offers Product Management, Engineering, and other roles within Marketing Technology, reporting to the CMO at Salesforce. Our core offerings include Marketing Automation platform products to manage data, decisions, and activations to internal customers in Sales, Marketing, and across the Marketing Lifecycle.

After leveraging B2B Marketing Automation platforms for over a decade (incl. Eloqua, Pardot, Marketo), and having built a bespoke / non-standard solution in B2C Marketing Cloud (formerly “Exact Target”), we’ve decided to innovate and modernize, undertaking an accelerated migration off of this fragmented tech & solution stack and into our own Data Cloud + Flows feature sets, known internally as the “Next Gen Marketing Automation” project.

Salesforce MDS is seeking a Supplier proposal for an accelerated engagement to audit & assess our DevOps current state, suggesting a business process, environment, and automation strategy to kickstart our DevOps Program to ensure our Platform & Engineering teams can safely and performantly scale within a shared Data Cloud environment & ecosystem. This scope of delivery ensures a structured approach to the initial phase of starting a DevOps Program embedded alongside our overall Next Gen Automation project.

## Scope Details

### Project Goals

1. Current State Audit & Assessment
2. Program Framework Proposal
3. Strategy Foundations
4. Implementation Design
5. Phased Roll-out Plan
6. Delivery Timelines

### Scope of Work

Through the balance of FY24Q4, selected Supplier(s) will work with MDS Marketing Automation to deliver key reference materials, provide important context, alignment, and guidance as we orient together into Performance Culture, including:

#### **1. Current State Audit & Assessment**

- 1.1. Current System Analysis
  - 1.1.1. Detailed analysis of the current Data Cloud infrastructure, applications, databases, and processes.
  - 1.1.2. Evaluate existing Continuous Improvement / Continuous Delivery (aka "CI/CD") pipelines, automation tools, monitoring systems, and deployment strategies proposed / planned for Data Cloud instances.
  - 1.1.3. Review our proposed Data Cloud future state architecture & design patterns, and capture discoveries & recommendations.
- 1.2. Toolchain Assessment:
  - 1.2.1. Review of the current DevOps toolchain supporting Data Cloud to identify gaps, redundancies, or areas for improvement.
- 1.3. Performance Metrics:
  - 1.3.1. Gather performance metrics of our existing Data Cloud instances to serve as a benchmark for post-migration performance.
  - 1.3.2. Review current state observability & telemetry for breadth, depth, maturity, and reliability.
- 1.4. Outputs & Outcomes
  - 1.4.1. Post Interview / Early Discoveries Presentation (re: 6.2.2)

- 1.4.2. Tech, Toolchain, and Observability dimensions within detailed Audit Assessment Package & Presentation (6.2.4 - 6.3.1)

## **2. Program Framework Proposal**

- 2.1. Requirement Gathering:
  - 2.1.1. Engage executive sponsor, functional leaders, and technical SMEs to capture both technical and business requirements for future DevOps program implementation around Data Cloud.
- 2.2. Resource Allocation:
  - 2.2.1. Determine personnel and infrastructure resources needed to enact, implement, and support DevOps practices (automated &/or manual) for Data Cloud deliverables, alongside the Next Gen Automation project.
- 2.3. Timeframe & Phasing Estimation:
  - 2.3.1. Establish tentative timelines & key deliverable phases to outline Data Cloud DevOps Program enhancements alongside Next Gen Automation project roadmaps.
- 2.4. Outputs & Outcomes
  - 2.4.1. Post Interview / Early Discoveries Presentation (re: 6.2.2)
  - 2.4.2. Future Program & suggested Staffing Plan dimensions within detailed Audit Assessment Package & Presentation (6.2.4 - 6.3.1)

## **3. Strategy Foundations**

- 3.1. Migration Approach:
  - 3.1.1. Decide on the migration methodology (e.g., big bang, incremental).
  - 3.1.2. Callout any platform, instance, implementation specifics when applying DevOps principles & automation to Data Cloud.
- 3.2. Toolchain Strategy:
  - 3.2.1. Selection of tools for IaC, CI/CD, monitoring, etc., based on the assessment phase
- 3.3. Risk Management Strategy:
  - 3.3.1. Identify potential risks and develop mitigation and rollback strategies.
- 3.4. Outputs & Outcomes
  - 3.4.1. Post Interview / Early Discoveries Presentation (re: 6.2.2)
  - 3.4.2. Migration, tool, and risk management dimensions within detailed Audit Assessment Package & Presentation (6.2.4 - 6.3.1)

## **4. Implementation Design**

- 4.1. Infrastructure Design:

- 4.1.1. Design the target infrastructure architecture, including network design, storage, compute, and database considerations.
- 4.2. CI/CD Pipeline Design:
  - 4.2.1. Map out the continuous integration and deployment workflows.
- 4.3. Security Design:
  - 4.3.1. Plan for security measures, including IAM roles, security groups, encryption mechanisms, and compliance considerations.
- 4.4. Monitoring & Logging Design:
  - 4.4.1. Choose and design monitoring, alerting, and logging systems to ensure visibility post-migration.
- 4.5. Outputs & Outcomes
  - 4.5.1. Post Interview / Early Discoveries Presentation (re: 6.2.2)
  - 4.5.2. Detailed Data Cloud infrastructure, automation, monitoring, and (as necessary) manual process dimensions within detailed Audit Assessment Package & Presentation (6.2.4 - 6.3.1)

## **5. Phased Roll-out Plan (Stretch / Fast Follow)**

- 5.1. Stretch / Fast Follow:
  - 5.1.1. NOTE - This RFP / RFQ does not include nor expect this deliverable to open / close in our FY24Q4 timeline, but vendor candidates may choose to either include 5.2-5.6 in 6.3 deliverables, for potential fast follow-on work next fiscal year;
- 5.2. Pilot Phase:
  - 5.2.1. Select a lower environment for the initial Data Cloud DevOps roll out to validate the migration process and tools.
- 5.3. Iterative Migration:
  - 5.3.1. Based on the pilot's results, roll out the migration in iterations, prioritizing components based on their dependencies and business impact.
- 5.4. Feedback & Iteration:
  - 5.4.1. After each phase, gather feedback, measure against the initial performance metrics, and make necessary adjustments before the next phase.
- 5.5. Final Migration:
  - 5.5.1. The last step would involve the migration of remaining components and a complete switch to the new environment.
- 5.6. Post-migration Review:

- 5.6.1. Once the entire migration is complete, conduct a review to measure the success against initial objectives, document lessons learned, and make recommendations for future projects.

**Additional Information:**

**Current Roadblocks & Barriers to Success:**

1. Low operational investment in teams & projects today.
2. Distinct definitions & expectations of “DevOps” across stakeholders.
3. Data Cloud feature availability & connection methods across our platform stack.
4. Few Data Cloud testing principles & processes in place today, with zero automation.
5. Few platform / performance metrics captured today.

**Expected Delivery Timeline**

While we expect the suppliers to provide a detailed approach and timeline in their proposals - we have provided our estimate on the different milestones to complete work by Jan 31, 2024

Milestones	Estimated Date
Program Start	Dec 18, 2023
Interviews and Assessments	Dec 18, 2023 - Jan 5, 2024
Holidays	Dec 22, 2023 - Dec 26, 2023, Jan 1, 2024
Initial Audit Discovery Presentation: Infrastructure, Toolchain, Observability & Telemetry, People & Processes	Jan 10, 2024
Workshops: <ul style="list-style-type: none"><li>● Program Framework</li><li>● Strategy</li><li>● Data Cloud Implementation &amp; Infrastructure</li></ul>	Jan 12, 2024 - Jan 22, 2024

Draft Discovery + Deliverable Presentation; Reviews & Feedback	Jan 26, 2024
Program Discovery+Deliverable Presentation	Jan 30, 2024
Final (as necessary) Updates & Sign-off	Jan 31, 2024

## **2.RFP INSTRUCTIONS**

### **General Information**

- Your RFP response will consist of submitting a proposal AND answering all the questions in the Scout RFP tool.

### **RFP Concierge (Contact & Questions related to RFP)**

Your Concierge (contact) for this RFP will be Avik Sengupta ([avik.sengupta@salesforce.com](mailto:avik.sengupta@salesforce.com)) and Laura Rivera ([laura.rivera@salesforce.com](mailto:laura.rivera@salesforce.com)). Please ensure that you direct all questions and general communications regarding this RFP directly and solely to this contact. Please do not contact others at SFDC in regards to this RFP.

### **Schedule of Events**

Event	Description	Timing
<b>Issue RFP</b>	Participants to carefully review all details contained within the RFP Document.	Nov 27, 2023
<b>Q&amp;A</b>	Each RFP participant will have the ability to ask specific questions related to this RFP. Please submit your questions in the tool by Nov 29, 2023. Please reach out directly to your Sourcing Concierge for questions or if a meeting is needed.	Nov 29, 2023
<b>Q&amp;A Answer Package</b>	Answers to all questions asked by all participants will be shared as a package back in Scout (Workday Strategic Sourcing)	Dec 1, 2023
<b>Q&amp;A Briefing</b>	Combined call with all RFP participants to go	Dec 5, 2023

	over the Q&A answers and any additional context (to be scheduled)	
<b>Proposal</b>	Please submit your proposal addressing all the details and expectations in Scout (Workday Strategic Sourcing)	Dec 8, 2023
<b>Presentations for finalists</b>	Finalists will be shortlisted based on proposal evaluation and will be invited to a 30 min to 1-hour meeting to walk through their proposal and answer additional questions (to be scheduled)	Estimated Dec 14/15, 2023
<b>Final Supplier Selection</b>	Final supplier selection	December, 2023

## Proposal Instructions

Please submit your proposals and include answers to the questions listed below.

1. Experience in DevOps transformations, with specific attention paid to Data Cloud challenges & opportunities.
2. Brief description of the suggested team composition, location(s), along with specifics on expected experience & tech profiles (including sample / specific CVs).
3. Project plan (stages and estimated timelines) and approach, including expected team ramp-up time, and suggested milestones.
4. Pricing - Please provide total cost for the solution you are proposing. We expect a fixed fee with a detailed breakdown of key milestones identified and mapped to key Deliverables. The pricing must be backed by details of resources, their location and levels - information to be filled in the resource template attached to this RFP
5. Enterprise client testimonials / references (2+) for similar Data Cloud DevOps work, along with any pertinent, vendor-authored thought leadership articles, blogs, or whitepapers.
6. Filled up Statement of Work (SOW) in the SOW template attached in the RFP



## Delivery of RFP Response

All RFP Responses (also referred to as “Proposals”) are due no later than **Dec 8, 2023, 8 PM PT**. Proposals received after the due date will be considered at Salesforce’s discretion. Please submit one (1) electronic copy of RFP (pricing included), in Scout.

## RFP Evaluation Criteria

The RFP evaluation will be based on the following criteria (not listed in order of priority):

Evaluation Criteria	Description
Delivery Experience Relevancy & Demonstrated Results	We will assess the history of your company, your experience as it relates to this RFP, evidence of past performance, quality and relevance of past work, references, and related items.
Strategic Thinking & Planning Approach:	Overall approach and strategy requested and outlined in the proposal and firm capacity to deliver the engagement within the specified timeline (prior experience of the firm in meeting timelines will be factored into scores)
Program Management Efficacy	We will review suggested team composition(s), program management methodology, thoughtful alignment to / suggested divergences from delivery timelines, and overall engagement efficiencies to ensure the best outcomes possible in this limited engagement window.

## 3. Other Terms and Conditions

The following are general terms and conditions for the Supplier. By submitting a proposal, the Supplier is subject to all such terms and conditions. This list is not a comprehensive list of all of Salesforce’s general terms and conditions. The remainder will be provided in the event that you are the successful bidder.

### **Acceptance and Rejection Process**

- Proposals will be reviewed after the submission due date and time.
- Salesforce will conduct a comprehensive and objective evaluation of the proposals.
- Acceptance will be upon signing of an agreement with Salesforce for the Supplier's products and services.

Salesforce reserves the right to:

- Make an award without further discussion of the Proposals submitted. Therefore, Proposals should be submitted on the most favorable terms that the Supplier could propose to Salesforce. Subsequent to the receipt of the Proposals, and at Salesforce's option, discussions may be scheduled with individual Suppliers if it becomes necessary to clarify elements of their Proposal.
- Purchase all, part of or none of the services listed.
- Make no selection from the bids submitted, with no reason required for the decision.
- Cancel the RFP process completely and/or re-start the process for whatever reason Salesforce deems necessary without obligation or liability to any Supplier.
- Waive and/or address any informalities and irregularities in the Proposals received.
- Award more than one contract.
- Award a contract (if any) to whomever Salesforce, in its sole discretion, deems appropriate and in the best interests of Salesforce.
- Accept other than the lowest cost offered.
- Make no commitment to volume. All estimates and projected growth are guidelines and are not a commitment from Salesforce.

Each Supplier shall be prepared to elaborate upon and clarify its written Proposal(s). Proposal(s) will be reviewed for business value, completeness, competitiveness, simplicity and realism. Award(s) will be based on the Proposal(s) that Salesforce determines best meets their business, technical and customer service requirements. Salesforce may make single or multiple awards each for a specific portion of its requirements. Salesforce also reserves the right to reject any or all Proposals received.

It is understood that an award of any or all of this RFP is dependent on the successful and timely completion of the appropriate Salesforce Agreements (in form and substance satisfactory to Salesforce). In order to allow for an adequate evaluation, Salesforce requires that all Proposals are to remain valid and irrevocable for at least one hundred and eighty (180) days after the Proposal due date.

Nothing in this RFP is, or should be, relied upon by the Supplier as a promise or representation by Salesforce. This RFP is not to be construed as an agreement, offer or undertaking to offer or obtain products and/or services. Salesforce is not obliged to accept any proposal submitted pursuant to this RFP and the selection of a particular Supplier will be at its sole discretion.

### **Confidentiality Agreement**

The Supplier agrees that any information obtained from the RFP or Salesforce during the RFP and/or RFP tender is **strictly confidential** and agrees that it will not disclose any such information to any third party without Salesforce's prior written consent.

Supplier must adhere to the terms of the signed Supplier Mutual Confidentiality Agreement.

**Proposal Cost Liability**

The Supplier is responsible for all costs associated with the preparation, presentation and demonstration of your proposal and any contract negotiations which may occur. The receipt and consideration of your proposal in no way obligates Salesforce to you financially or otherwise. In addition, no Supplier awarded a contract and/or successfully negotiating a contract as a result of this RFP may charge any of its costs incurred to Salesforce at any time.

**Proposal Disclaimer**

Your response to this RFP indicates your understanding that this is not a contract nor an offer of business by Salesforce. Your response is an offer to Salesforce to provide products and/or services which Salesforce is free to accept or reject in whole or in part. Furthermore, should you already be providing products and/or services to Salesforce that relate to the products and/or services requested in this RFP, your response to this RFP indicates that you understand that your continued provision of such products and/or services on behalf of Salesforce may not continue or may change.

**Right to Select**

Salesforce reserves the right, in its sole discretion, to select and negotiate with those Suppliers it judges qualified for competitive proposals and to terminate negotiations without incurring any liability.

**Intention to Bid Form**

After reviewing this RFP, you must select that you “Intend to Bid” in the ScoutRFP tool. The form must be agreed to and signed by a representative legally authorized by the company. Failure to send this notice before the due date and time listed may disqualify your company from consideration.