**Due Diligence Questionnaire**

Email and SMS Platform

Date: 9th May 2016

Section 1: Supplier Details (For Information Only)

* Supplier Information
* Licencing and Registration

Section 2: Qualitative Questions

* Technical and Professional Ability
  + Business Continuity
  + Quality Assurance
* Implementation, Continuous Improvement and Innovation
  + Implementation
  + Continuous Improvement and Innovation
  + Scope of Services

Section 3: Declaration

Section 4: Cost Model (100%)

* Template
* Features required

|  |  |
| --- | --- |
| **Section 1: Supplier Details**  **(For information only)** | |
| **SUPPLIER CONTACT DETAILS** | |
| Company | MindFireInc |
| Name | Joseph Manos |
| Position | Executive Vice President |
| Telephone | 916-284-8112 |
| Mobile | 916-284-8112 |
| e-mail | jmanos@mindfireinc.com |

|  |  |
| --- | --- |
| **Supplier Information** | |
| 1.1 | Full name and address company |
|  | **MindFireInc**, 30 Corporate Park, Suite 400; Irvine, CA 92606 |
| 1.2 | Date of formation of company. |
|  | 1/16/2000 |
| 1.3 | Registered address and registration number of company. |
|  |  |
| 1.4 | Registered VAT number |
|  | Federal Tax ID: 82-0572992 |
| 1.5 | If your company is a member of a group of companies please give the name and address of the holding company. As a supplement, please provide a one-page chart illustrating the ownership structure of your company including relations of the contracting company to any parent or other group or holding companies. |
|  | N/A |
| 1.6 | Please provide your Terms & Conditions as a basis for a contract of this nature. |
|  | Subscription Based License Agreement, Annual License Agreement, with payment options of monthly (credit card on file), quarterly and annual. Quarterly and Annual Payment Programs offer additional discounts off of annual program costs.  While your RFI has some estimates for the volume of emails and SMS, to provide you with the best pricing opportunity, we require more specific information on the number of contacts and emails on a monthly basis. With this information we can provide you with a specific program cost by month, optimizing the pricing options based on need.  Additionally, on the SMS requirement, many of our international customers use a local carrier for their SMS with improved pricing levels. Then they connect the SMS to the Studio program using Cloud Connect, our Application API framework.  For your pricing section for emails, I took the requested numbers as an annual estimate and created a monthly average for the usage and pricing table. |

|  |  |
| --- | --- |
| **Licencing and Registration** | |
| 1.7 | Please detail all relevant trade body memberships. |
|  | Dscoop, DMA, PODi and AMA. |
| 1.8 | Please detail any relevant accreditations that your company holds. |
|  | N/A |
| 1.9 | Please confirm that your company is compliant with all legislation relevant to the services you will be providing. |
|  | Yes. |
| 1.10 | Please provide a copy of your data protection policy |
|  | Under separate attachment, additionally, we use AWS across the globe so I have included the AWS policies as well. |

|  |  |  |
| --- | --- | --- |
| **Section 2: Qualitative Questions** | | |
| Responses are required to indicate using an “x” against each relevant lot, which areas they would like to be considered for in this procurement process. Vendors should refer to the “Scope of services” within the RFI and “Cost Model” for further details on the scope of work covered by each lot. | | |
| **LOT NUMBER** | **YES** | **NO** |
| LOT 1 – Email Platform | X |  |
| LOT 2 – SMS | X |  |

|  |  |
| --- | --- |
| **2a: Technical and Professional Ability** | |
| Suppliers who self-certify that they meet the requirements will be required to provide evidence of this if they are successful at contract award stage. | |
| **Business Continuity** | |
| 2 | Please describe how your organisation manages business continuity to ensure that critical services have minimal disruption in the event of an emergency or business continuity incident such as loss of site, loss of service staff and access in a civic emergency. |
| Answer> Max 300 words |
|  | MindFire has multiple levels of protection, redundancy, monitoring and back-up, switch over processes in place to protect our customers programs.  Loss of availability occurs when an application is offline, unreachable, or sluggish in response, and is measured as the percentage of time a system is operational during a given period of time.  At MindFire, our goal for the MindFire Platform is to minimize or eliminate any interruption in service, including minimal downtime during system updates. To achieve this objective, MindFire:  -incorporates numerous Amazon Web Services (AWS) services that are by design highly­available; and  -in situations where the AWS services are not by default highly­available, enforces system designs that ensure availability.  Our processes allow for the following deliverables:   * ● obtain high availability via the AWS datacenter configuration; * ● achieve high availability at the application level using AWS “building block” services; * ● perform system updates that have minimal to no downtime; and * ● monitor system health and respond to degradation in service. * To remain Highly Available, each MindFire subsystem is available in two separate AWS Availability Zones (AZs).  Availability Zones are distinct geographical locations that are engineered to be insulated from failures in other AZs. * By placing MindFire instances in multiple AZs, our application is protected from failure at a single location.  If one Zone fails, the application in the other Zone can continue running, because AWS Route53 (a highly available and scalable Domain Name System web service) and Elastic Load Balancer (ELB) work together to automatically route traffic across multiple instances and multiple Availability Zones.  When necessary, we can elect to provision our services in any of the 12 AWS regions in the United States, Brazil, Europe, Japan, Singapore, Australia, Korea, and China (see Appendix A for a detailed break­down). In total, these locations represents a selection of 32 Availability Zones.  At present, the MindFire Platform resides in the US­West (Northern California) Region.   Each Availability Zone runs on its own independent infrastructure, engineered to be highly reliable so that even extreme disasters or weather events should only affect a single Availability Zone. The data centers’ electrical power systems are designed to be fully redundant and maintainable without impact to operations. Common points of failure, such as generators, UPS units, and air conditioning, are not shared across Availability Zones.  In case of a disaster, MindFire has the ability to redeploy within minutes in a different region utilizing AWS CloudFormation.  Health Check examples include ensuring that:  ●  Emails are delivered to a recipient’s inbox, and measuring the latency from send­to­receipt  ●  Landing pages are responsive, including measuring latency from multiple parts of the world  ●  All Engagement tracking is successfully inserted into the Database with 100% accuracy  ●  Dashboard reporting is accurate, current, and page­load latency is measured  ●  Standard operations like Studio Login, Contact Import, and Program Publish are successful  24x7x365, a MindFire team member is assigned primary duty for monitoring and response to any critical health checks. When issues arise, this person engages the Chief Software Architect and EVP of Client Services in order to remediate or take action. |
| 2.1 | Do you have in place documented and maintained business continuity plans that can be utilised in the event of a major incident/disaster? |
|  | Yes. |
| 2.2 | If the answer to 3.6 is ‘yes’ do these plans cover ALL areas of the business areas that will be providing your proposed solution? |
|  | Yes. |
| 2.3 | If the answer to 3.6 is ‘yes’, then do these business continuity plans include a crisis/emergency management plan? |
|  | Yes. |
| **Quality Assurance** | |
| 2.4 | Please provide details of quality assurance procedures and processes you have implemented that are relevant to this type of activity and any quality assurance certificates obtained.  As part of your response, please detail your organisations comments, compliments and complaints policy, and how has this influenced service delivery? |
| We have a multi-level Health Check Program in place that monitors how customers are using the solution. In addition, we pro-actively follow-up with customers where we identify any issue or trends that impact the overall usability, overall satisfaction, customer success and our long-term relationship.  MindFire has monitoring and health checks in place on several levels. These pro-active monitoring processes allow us to monitor any issues submitted by a customer and elevate those that can't be fixed by our Level 1 support team, to Level 2 support to insure that the issue is resolved in a timely manner.  Each customer case is automatically logged into our system and is tracked until the issue is resolved. In fact, an email is sent to the customer when the case is closed asking if the resolution of the issue was to their satisfaction and if they require additional help.  If for some reason the issue is beyond normal issue types, we then elevate it to our development team for resolution.  We monitor metrics on all customer activities, to ensure each customer is meeting their needs based on the number of cases submitted to our team. Each customer issue results in a unique case with an ID that is tracked until the issue is resolved.  This process allows us to mitigate any issues long before they become problematic for our customer or MindFire. Additionally, we pro-actively reach out to all customers on several levels for feedback on how they are doing and any issues or needs that we can help with.  We have a team that regularly performs customer care check-in calls for a live conversation on how they are doing. All customer communication is documented in our CRM and shared with the customer care team, key executives and team members.  Finally, we have an interactive site that allows customer to contribute as often as they would like ideas for improvements to the solution to meet their needs. Other customers can add to the comments and build a continuous stream of input that we use for ongoing development of the Studio platform.  MindFire maintains an exceptionally high customer approval rating with all customers and they openly share with one another what a great partner we are for helping them grow their business. |
| **2b: Implementation, Continuous Improvement and Innovation** | |
| **Implementation** | |
| 2.5 | Please provide your proposed Implementation Plan and confirm the recommended sequence of tasks, dependencies and key milestones. |
|  | MindFire has a planned launch process for all new customers. we maintain an ongoing communication with customers on several levels throughout the lifetime of our partnership.  The sequence of events is tailor-designed for each customer need.  After the launch of the Studio to the new customer, a planning meeting is scheduled to identify each customers launch program objectives.  What's the first project planned for the company?  For most customers the initial project is the launch of a self-promotion program to development new leads for your services.  If the initial project planned is for a customer project, then we scope the program and offer critical insight for optimizing the results using the Studio.  The next step is Studio training. We have a number of options for Studio training.  They include self-paced video training, as well as a formal two-day Studio intensive training in our Irvine, CA headquarter-location. We recommend the two-day training as the level of capability resulting from the training leads to a fast start in all areas of utilization.  Some customers elect to have our trainers come onsite to perform the training. If this option is selected the cost is $1,250 per day and all T & E.  Once the initial phase of training is complete, then we onboard your program with additional one-on-one meetings with our training team to answer any questions on set-up requirements for a successful program launch. We work with you to insure all parts of the program are set-up correctly and ready to go.  Of course, throughout the process our support team is always available to you via phone and email support. We also have an extensive FAQ and online support tools to help during the times we aren't available. |
| 2.6 | Please provide brief details of any tools or systems, which your organisation currently utilises for the delivery of work you intend to bid for as part of this procurement. |
|  | N/A |
| 2.7 | What training do you provide? |
|  | See outline in the attached document, MindFire Studio Pricing Guide. |
| 2.8 | How do you provide your training? |
|  | Web, video and live classroom training. |
| 2.9 | When do you provide training (e.g. pre-implementation / post implementation) and how do you train new starters post-implementation? |
|  | Training is an ongoing process in the MindFire world. We have our Onboarding Training to get you and your team launched successfully, then on a monthly basis, we host training programs on a number of important areas to continue to build skills and capabilities in a number of critical growth areas.  These programs are in all of the critical growth areas such as, Social Media use cases, Retargeting form the website, advanced use cases that have delivered exceptional program results for a customer.  The training webinars are recorded so even if you can't attend, you still have access to our recorded library of training. |
| **Continuous Improvement and Innovation** | |
| 2.10 | Outline your recommendations for identifying and proactively communicating to the elements of your proposed solution/service that have the scope to be continuously improved throughout the contract period. |
|  | There are several avenues to insure continuous improvement of our platform utilization.  First, the initial planning meeting to lay the foundation for the first quarter of activity with our solution. We will identify those areas where we can add value and our expertise to improve the overall results.  Next, situational needs. When an opportunity for a new program or specific need, we can meet to discuss the elements of the program and offer our insight on best practice methodologies for the desired outcome. Since we have extensive experience around the globe with programs of all type, we have the ability to help identify the best course of action.  Quarterly review meetings to identify how we can enhance current opportunities, as well as help work through any challenges that limit the level of success you seek. These planning meetings always lead to new, innovative ideas for business success.  Our ongoing training will be an important vehicle for continuous improvement. |
| 2.11 | Outline your recommendations for identifying the criteria for measuring improvements. |
|  | That depends entirely on your focus areas, current skill set and customer program type. Before we could begin to make a recommendation we would need more data.  What should be known is our customers are delivering exceptional results for their customers in a variety of industries and use cases. A big part of our customers' success is the collaboration with MindFire and in some cases, we play an active role presenting to our customers client. Including strategy meetings side-by-side with our customer and the client. |
| 2.12 | Outline your recommendations for quantifying the benefits of such improvements. |
|  | As stated earlier, we need more data before we can comment. |
| 2.13 | Outline your recommendations determining the realisation of improvements and benefits. |
|  | In this area we recommend the following:  - Extensive training for all key team members. Executive staff, sales staff and technical staff. Each team has a different track(s) of training material.  - Strategy Meetings for important program design and implementation program flow.  - Review of program materials, creative (all elements), landing page flow, triggers and any other program areas.  - Review of the results. Detailed discussions on how the results were achieved and any necessary course corrections for the next wave of program engagement. |
| 2.14 | How will you identify and proactively communicate any solutions/services outside the scope of this RFI that may present additional benefit realisation opportunities through the introduction of innovation? |
|  | Whenever we feel we have a high-value deliverable for our customers, we pro-actively reach out to them and make them aware of the new capabilities. We provide documentation to them on the capability and in most cases, we have an educational webinar so they have a recording that can be used for internal/external needs. |

|  |  |
| --- | --- |
| **2c: Scope of Services** | |
|  | Please see **Appendix C** that describes the features required |
|  |  |
| 2.15 | Please describe your process for handling blacklisting |
|  | To begin with we monitor all email activity on multiple levels. We have a very high sender rating and reputation and we monitor it daily.  We isolate, and in some cases shut down any customer program that is in violation of our stated email policy.  We closely monitor our complaint rates, so even with minor customer infractions we can prevent delivery failures before they happen. |
| 2.16 | Please provide a copy of example reporting and management information available |
|  |  |
| 2.17 | Please describe your process when releasing updates and how you notify clients/users |
|  | We notify all users three weeks in advance of the next release date. We have multiple notifications of the pending update so every customer is in the loop.  We clearly state the hours of the service interruption and if any customer has any special needs they can notify us for help. |
| 2.18 | Please provide details of your white label solution |
|  | The white label solution is branded completely to our customer in all customer facing areas. |
| 2.19 | Suppliers should identify any features of their response that they particularly wish to bring to our attention, including any investment costs. |
|  |  |
| 2.20 | Suppliers are required to propose and contract for cost saving initiatives. Suppliers are required to state how they will deliver these savings. |
|  | We can offer savings on several levels with more data on your use cases.  The first level of savings is how you pay for our subscription license. If you elect to make quarterly or annual payments you can enjoy additional savings off of the standard license costs.  Additionally, there are use cases where the more you use the Studio, you build a savings account (credits) that reduce your overall usage costs on a monthly basis. |
| 2.21 | Suppliers should provide options for financial modelling of their costs over the life of proposed contract term. E.g Longer term contract, additional business/scope of services |
|  | As mentioned above, anything is possible based on your needs. Longer-term agreements offer additional savings, as well as payment options. If you have specific use cases we can tailor-design a program with optimized savings for your needs. |

|  |  |
| --- | --- |
| **Section 3: Declaration** | |
| 3 | I declare that to the best of my knowledge the answers submitted to these questions are correct.  I also declare that there is no conflict of interest.  The following appendices form part of our submission;   |  |  | | --- | --- | | Section of Questionnaire | Appendix Number | | MindFire Pricing Guide | D | | AWS EU Data Protection | E | | What's New in MindFire | F | | Reporting examples in video below | G | | Video on using the Studio | G | |
| 3.1 | NAME: Joseph Manos, Executive Vice President, MindFireInc |
|  | jmanos@mindfireinc.com |
|  | mobile 916-284-8112 |