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Health Resources and Services Administration
Office of Acquisition Management and Policy
RFQ #: 75R60221Q00287

BPHC Salesforce CRM System Support Services Volume 1 – Technical Quote

September 3, 2021

Submitted To:
HRSA - BPHC
Office of Acquisition Management and Policy
5600 Fishers Lane
Rockville, MD 20857-5600

Submitted By:
TechSur Solutions LLC
205 Van Buren Street,
Suite 20,
Herndon, VA 20170
www.techsur.solutions
Tel: (571) 442-3664

Point of Contact:
Rupinder Yadav
[President]
205 Van Buren Street, Suite 20,
Herndon, VA 20170
rupinder@techsur.solutions
contracts@techsur.solutions
Tel: (703) 584-4283

TECHSUR

Delivering Amazing Results

205 Van Buren Street, Suite 120
Herndon, VA 20170
Tel: (571) 442-3664
www.TechSur.Solutions

September 3, 2021

Mr. Pradeep Nair, Contracting Specialist
Office of Acquisition Management and Policy

Health Resources and Services Administration (HRSA)
Bureau of Primary Health Care (BPHC)
5600 Fishers Lane
Rockville, MD 20857-5600

Subject: Response to RFQ 75R60221Q00287 for BPHC Salesforce CRM System Support

Dear Ms. Nair,

TechSur Solutions (TechSur) is pleased to submit this quote to the HRSA in response to the subject Request for Quote (RFQ). TechSur welcomes this opportunity to establish its partnership with HRSA in support of the BPHC Salesforce CRM System Support Services. TechSur takes no exceptions to the RFQ terms and conditions. Per the requirements, our proposal includes a three-part submittal:

- Volume I Technical Quote
- Volume II Price Quote
- Volume III Past Performance

Requested Information

- RFQ Number: 75R60221Q00287
- Project Title: BPHC Salesforce CRM System Support Services
- Company: TechSur Solutions LLC
- Address: 205 Van Buren Street, #120, Herndon, VA 20170
- GSA MAS: 47QTCA20D00C6
- TIN: 81-3563670
- DUNS: 080386655
- Quote Validity: This quote is valid for 90 calendar days from the date of submission.

If you have any questions, please feel free to contact me at 703-584-4283 or rupinder@TechSur.solutions or Amit Yadav, CTO, at 571-442-3664 or amit@TechSur.solutions.

Sincerely,

Rupinder Yadav
President

VOLUME 1 – TECHNICAL

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Volume I–Technical Quote

1 Understanding of the Project

1.1 Understanding of the Scope of Work Requirements

Team TechSur is pleased to provide this proposal and our understanding of the BPHC SOW. We have a long history of providing all of the requested Salesforce services in addition to our history of designing, developing, deploying, and supporting enterprise systems on the Salesforce CRM platform.

The of the majority of the BPHC staff is now trained and using Salesforce CRM. Tracking customer issues and securing proper SME suggestions leads to knowledge bank growth that can potentially provide quicker, more accurate answers/results with a minimal amount of resources investment. This initial Salesforce experience led to BPHC's decision to explore further use of Salesforce's extensive capabilities. Improving the health of the Nation's underserved communities and vulnerable populations through access to comprehensive, culturally competent, quality primary health care services is written like it was meant for the Salesforce platform to facilitate success.

As stated, Salesforce proved to be a valuable tool in helping BPHC respond to the COVID-19 crisis by streamlining data collection from health centers across the country and turning those results into action to help fight the pandemic at national, state, and local levels. In addition, Salesforce Community was implemented to assist with the administration of the COVID-19 Vaccine Program. As a result, the introduction of Communities' capabilities can now be expanded to communicate with and serve BPHC's customer base more effectively.

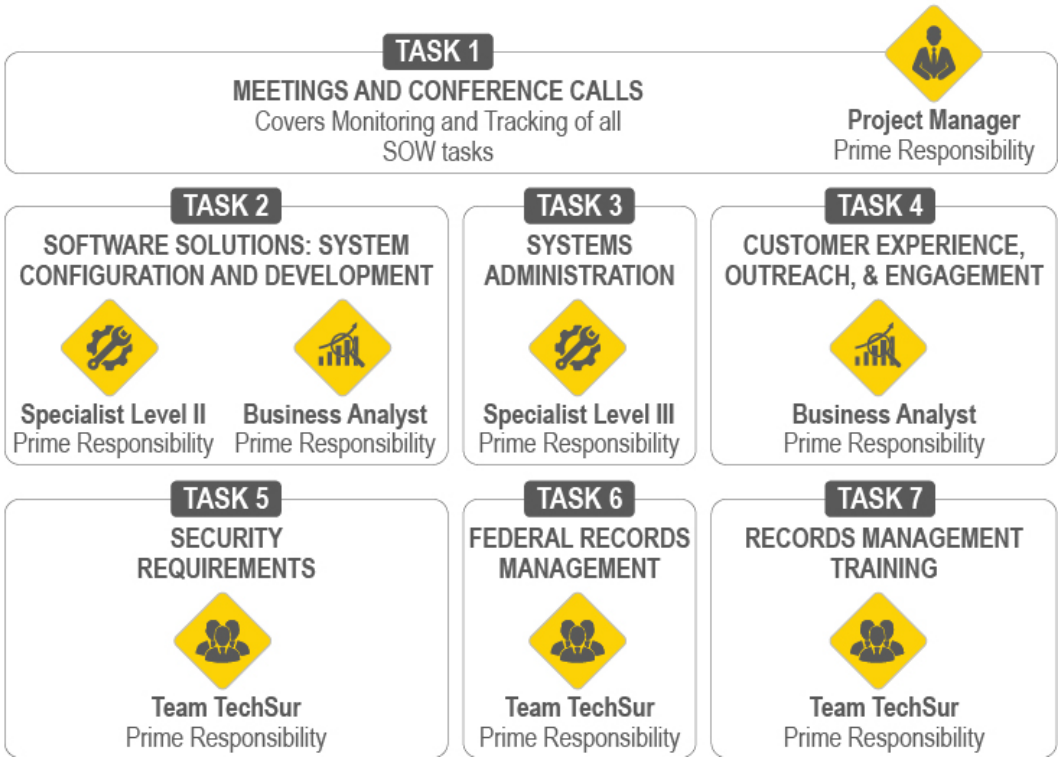
From a BPHC internal process standpoint, the Electronic Handbooks, EHBs, will continue to provide the baseline tasks of full lifecycle grants management. Team TechSur is very familiar with grants management systems and has direct past insight experience with the .NET-based EHBs. BPHC requirements for ease of customer communication/tracking, grant program compliance, reporting, and overall grant performance information may all originate from EHBs from a raw data perspective. With the use of Salesforce as the data repository and business process automation tool, with easily viewed outcomes, BPHC can now adequately address grant program compliance with ad hoc and ongoing reporting requirements, continuous performance monitoring, and improvements in key clinical areas. Using Salesforce process automation capabilities, Team TechSur will further implement Salesforce capabilities that will improve effective communication between BPHC offices and your customers. Effective and trackable communications and feedback will lead to better insights of challenges so BPHC and Team TechSur can design and deploy better customer experiences through modifications or application development/deployment on the Salesforce platform.

Positive customer experiences will be facilitated through the tracking of issues, grant program compliance and reporting, and support help desk and training functions. Team TechSur support desk (Tier 2 and 3) provides real-time tracking of reported issues, resolution, timing/reporting, and is used within our knowledge base to review trends and needs. Additionally, a knowledge base extraction is used to assess software and business process modifications. Any changes implemented in Salesforce will also need proper customer communication through Communities, job aide material, and training to all affected users. Again, this knowledge base is key to driving training needs. Business process and training needs can also be driven by public health crises affecting program recipients like COVID-19.

Lastly, all project tasks and activities must be coordinated entirely with BPHC's Office of Strategic Business Operations Systems Division. Therefore, Team TechSur's PMBOK-based project plans will be developed for the SOW tasks and thoroughly reviewed, revised, and coordinated with the Systems Division throughout the contract's life.

Exhibit 1 below depicts Team TechSur's understanding of the Statement of Work and the project scope.

Exhibit 1. Team TechSur Understands the Scope of Requirements



1.2 Achieving Scope/Objectives of Tasks

Task 1: Meetings and Conference Calls

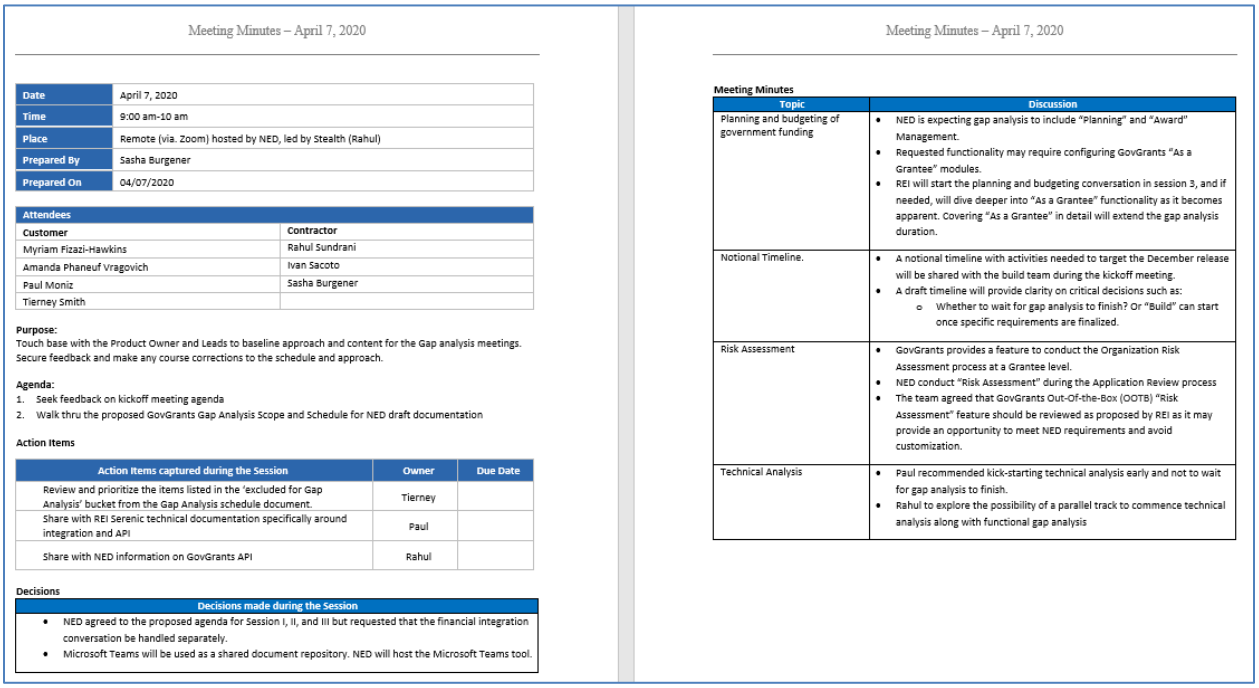
Team TechSur will assign a PMP-certified Project Manager (PM) to be designated as the Point of Contact (POC) to the Contracting Officer Representative (COR) and will be accountable for all deliverables across all tasks. The PM will be responsible for the Project Management Plan, Schedule, Budget, monitor, and report on all SOW activities. The PM will be the conduit between the COR, Systems Division representatives, and the Team TechSur members assigned with executing tasks on the project. The PM will make sure the project plan is sound, report regularly on its progress, and monitor execution within the approved budget and schedule. The PM will take complete ownership of timely quality delivery and management of cost, and reporting and is primarily responsible for "Task 1: Meetings and Conference Calls." The PM will be supported by a Business Analyst and other Team TechSur members as needed.

The PM will take the lead on drafting the Project Management Plan(PMP) and the initial schedule. The PMP and the schedule will be presented during the Kickoff meeting. As requested, the PM will deliver minutes within 10 business days and submit the final PMP within 30 days after the Kickoff meeting.

After the kickoff, the PM will meet weekly and as needed with COR and Systems Division representatives to review the status of Salesforce projects across the SOW and update status using BPHC Project Management tools (i.e., Cloud Coach). The minutes from the meeting will be shared within three days and will include key points, decisions, risks & issues, and action items. The PM will also submit a monthly status report on the 5th of each month codifying activities completed and planned for all SOW task areas.

Exhibit 2 below provides an example of a client's monthly minutes submitted by the Team TechSur PM.

Exhibit 2. Monthly Minutes Sample



Meeting Minutes – April 7, 2020

Date	April 7, 2020
Time	9:00 am-10 am
Place	Remote (via. Zoom) hosted by NED, led by Stealth (Rahul)
Prepared By	Sasha Burgener
Prepared On	04/07/2020

Attendees	
Customer	Contractor
Myriam Fizazi-Hawkins	Rahul Sundrani
Amanda Phaneuf Vragovich	Ivan Sacoto
Paul Moniz	Sasha Burgener
Tierney Smith	

Purpose:
Touch base with the Product Owner and Leads to baseline approach and content for the Gap analysis meetings. Secure feedback and make any course corrections to the schedule and approach.

Agenda:
1. Seek feedback on kickoff meeting agenda
2. Walk thru the proposed GovGrants Gap Analysis Scope and Schedule for NED draft documentation

Action Items

Action Items captured during the Session	Owner	Due Date
Review and prioritize the items listed in the 'excluded for Gap Analysis' bucket from the Gap Analysis schedule document.	Tierney	
Share with REI Serenic technical documentation specifically around integration and API	Paul	
Share with NED information on GovGrants API	Rahul	

Decisions

Decisions made during the Session
• NED agreed to the proposed agenda for Session I, II, and III but requested that the financial integration conversation be handled separately. • Microsoft Teams will be used as a shared document repository. NED will host the Microsoft Teams tool.

Meeting Minutes – April 7, 2020

Meeting Minutes

Topic	Discussion
Planning and budgeting of government funding	• NED is expecting gap analysis to include "Planning" and "Award" Management. • Requested functionality may require configuring GovGrants "As a Grantee" modules. • REI will start the planning and budgeting conversation in session 3, and if needed, will dive deeper into "As a Grantee" functionality as it becomes apparent. Covering "As a Grantee" in detail will extend the gap analysis duration.
Notional Timeline.	• A notional timeline with activities needed to target the December release will be shared with the build team during the kickoff meeting. • A draft timeline will provide clarity on critical decisions such as: o Whether to wait for gap analysis to finish? Or "Build" can start once specific requirements are finalized.
Risk Assessment	• GovGrants provides a feature to conduct the Organization Risk Assessment process at a Grantee level. • NED conduct "Risk Assessment" during the Application Review process • The team agreed that GovGrants Out-Of-the-Box (OOTB) "Risk Assessment" feature should be reviewed as proposed by REI as it may provide an opportunity to meet NED requirements and avoid customization.
Technical Analysis	• Paul recommended kick-starting technical analysis early and not to wait for gap analysis to finish. • Rahul to explore the possibility of a parallel track to commence technical analysis along with functional gap analysis

Task 2: Software Solutions: System Configuration and Development

Team TechSur members are certified at various levels of Salesforce and software development. In addition, TechSur's partner, Stealth Solutions, is also a certified consulting partner of Salesforce. As a Salesforce Consulting Partner, we have the in-house expertise to perform any level of Salesforce platform configurations and customizations to develop customer-specific applications on the Salesforce Cloud Platform.

We have designed, developed, deployed, supported, and enhanced Salesforce solutions at the federal, state, and local government levels. Team TechSur's Salesforce team encompasses a mindset to deliver maximum value to clients while transitioning to Salesforce and continued operational support excellence to realize Salesforce value indefinitely. The Salesforce team was built by hiring the best talent and mentoring the talent to deliver results. We are confident that our deep expertise and relationship with Salesforce will help BPHC improve business processes, crisis responses, and recovery capacity.

> *"Stealth Solutions [TechSur's partner] produces results! They are an exceptional partner to Amiti, and the success we have accomplished is a testimony of the quality of services delivered by Stealth. They continue to exceed our expectations."*
>
> — Amiti Consulting Corp.

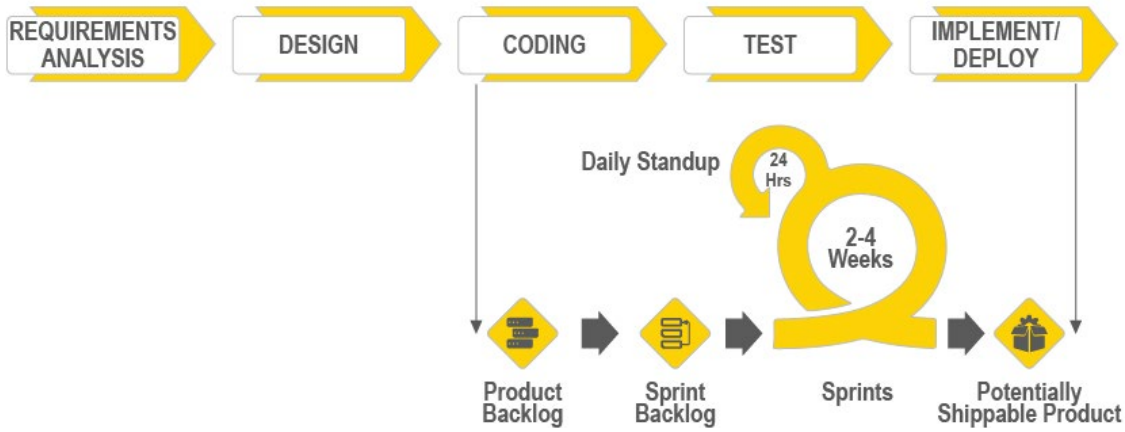
Team TechSur also has proficiency with Salesforce AppExchange product implementation. Unlike legacy application development, we can either configure or customize applications such as document generation, learning management, and a digital signature to meet BPHC's mission without incurring extensive and expensive customization. Team TechSur will assist BPHC with the following AppExchange services:

- Analyze Build vs. Buy;
- Analyze, Demo, Trial, Evaluate, and Recommend best AppExchange products to meet client needs; and
- Deploy, Configure, Customize, and Support the selected product.

Team TechSur has successfully configured and customized Salesforce CRM for agencies such as the United States Agency for International Development (USAID), DC Department of Health, Louisiana Community and Technical College System (LCTCS), City of San Diego's Economic Development Department (EDD), Region of Peel (Canada), Los Angeles Homeless Services Authority (LAHSA), Legal Services Corporation (LSC), and many more state and local agencies.

Team TechSur has a proven methodology for implementing Salesforce for our customers. We will adopt Agile methods to develop new features for BPHC Salesforce Customer Relationship Management (CRM). **Exhibit 3** below represents the execution approach that Team TechSur will leverage to build the 50 custom solutions referred to in the SOW.

Exhibit 3. Agile Execution Model



The following tasks will be performed for each of the Salesforce projects in the SOW:

1. **Requirements Gathering**: Team TechSur's Business Analyst (BA) will work with the identified stakeholders and conduct a series of interview sessions to determine all the high-level and detailed requirements. The requirements will be codified as user stories, and these stories will be compared against the Salesforce standard capabilities to identify gaps.

   Key Deliverables: User Stories

2. **Design**: Based on the identified requirements, Team TechSur's technical specialist will design the solution to be built on the Salesforce platform using a combination of best practices and a build vs. buy analysis. All objects, page layouts, triggers, workflows, etc., will be designed as a part of the design phase and documented. At this point, Team TechSur will provide a Level of Effort (LOE) to implement the solution. Finally, the Technical Design Document and LOE will be reviewed with the BPHC Salesforce Change Control Board for approval.

   Key Deliverables: Technical Design Document and LOE

3. **Build**: Team TechSur will build the solution using an Agile approach. The various requirements will be broken down into actual tasks and assigned to sprints. The length of the sprints would vary between 1 and 2 weeks depending on the complexity of the features. At the end of each Sprint, a feedback session is conducted to demonstrate the solution developed and get feedback from the stakeholders.

   Key Deliverables: Working solution in Salesforce Sandbox

4. **User Acceptance Testing (UAT)**: After all requirements have been developed, Team TechSur will conduct an end-to-end User Acceptance Training (UAT) process with all key stakeholders. A detailed UAT script for various roles would be prepared and circulated to the stakeholders to perform the UAT. All feedback from stakeholders and bugs reported will be captured in a UAT document. The bugs will be fixed before production deployment. Any newly identified requirements will be discussed with the BPHC Salesforce Change Control Board, and the implementation plan, if modified, will be communicated to all stakeholders.

   Key Deliverables: UAT Scripts, UAT Completed, Bugs documented and fixed

5. **Go Live Deployment**: After UAT, Team TechSur will coordinate and seek approval to deploy the changes to the Production environment. The Go-Live activities include:

   - Seek COR approval on requirement documents, corresponding user stories, release notes, and upload approved copies to SharePoint;
   - Assist the COR as needed with the Authority to Operate (ATO) and other security assessments and reviews before rolling out features to Production;
   - Coordinate changes with HRSA OIT, other Contractors, and Bureaus operating within the HRSA Org; and
   - Follow the established DevOps process for deployment, which entails creating a package from Salesforce Sandbox and deploying it to Salesforce Production.

Post-Go-live, Team TechSur will provide the post-Go Live Support as described in Task 3 below.

Task 3: Systems Administration

Upon completing a system turnover process, Team TechSur will provide systems administration for the currently deployed CRM and Communities environment, and all new functionality developed and deployed into Production. This includes the coverage for end-user issues anticipated at approximately 5,000 per year. Team TechSur will also provide hands-on support to new BPHC users and customers as they embark on system usage to ensure a successful launch and onboarding. Team TechSur's support team members will provide production support throughout the life of the BPHC contract from Monday to Friday from 8:00 a.m. – 5:00 p.m. EST, except for U.S. Federal Government holidays. Additionally, for critical issues, we will provide urgent customer support after regular hours.

Team TechSur will be responsible for Tier II Production Support and Tier III Platform Support. T sample items for each support tier are listed in **Exhibit 4** below.

Exhibit 4. Team TechSur will provide Comprehensive Production Support for Salesforce CRM

Tier II		Tier III
• "How To" – System-related Questions • Supports Onboarding • Troubleshoots and reproduces issues reported • Maintains User Accounts and Resets Passwords • Changes Profile for existing Users • Configures Reports and Dashboards • Manages Basic Configuration Changes (e.g., Add Instructions, Change Field Label)	• Develop and maintain configuration workbook Fixes • Develop and maintain a Salesforce data dictionary specific to BPHC operations • Use Salesforce recommended tools to optimize CRM processes and system performance GMS product defects • Configure and maintain Salesforce "sandbox" to stage	• Engages with Salesforce to support issues related to the Salesforce platform

Tier II	Tier III
• Maintains Updates to Existing Forms (Adding New Fields, Renaming Fields, Removing Fields) • Modifies Email Templates	and test approved configuration and code changes • Data Management • Document critical business processes

Team TechSur will adhere to processes and tools currently used by HRSA/BPHC for recording and tracking support issues.

Task 4: Customer Experience, Outreach, and Engagement

Team TechSur has supported numerous federal, state, and local government customers migrating to a Salesforce CRM system. We understand the criticality of user training and documentation in the successful launch and continued usage of a new system. Specifically, our trainings are typically hands-on, with detailed use cases instead of presentation only. This allows end users to learn by doing rather than just listening. Experts lead our trainings that have hands-on Salesforce CRM implementation experience, not just familiarity with Salesforce. This makes the exercise more realistic and grounded in actual usage. Our instructors are proficient in various training content delivery mediums and formats – from webinars, classroom training, self-service help/learning to eLearning videos. When possible, we recommend delivering training in-person to allow attendees to better interact with and engage with the trainer. That said, all Training is recorded for repeat viewings.

Team TechSur will work with the COR and BPHC representatives to develop a training plan including topics, objectives, participants, pre-requisites, preferred format, delivery dates, and attendees' enrollment process. In addition, we understand and are equipped to support the scope of "Task 4: Customer Experience, Outreach, and Engagement" of the SOW, which is to Identify training topics based on tier 2 support information, CRM developed enhancements, and customer feedback to deliver:

- Twelve (12) training events; and
- Six (6) BPHC-specific, customized micro-learning videos.

Team TechSur will provide three types of training to BPHC users:

- Instructor-Led Training (Traditional classroom);
- Virtual Instructor-Led Training (Online live training); and
- Staff Briefings, Brown Bag Sessions, or Office Hours.

All Training will be augmented with an instructor guide, student guide, and additional training materials. Additionally, all materials will adhere to Section 508 requirements and be continuously updated as required throughout the contract's life.

In addition to the Training options outlined above, we recommend building Salesforce functional user guides or provide reference to relevant content from the Salesforce knowledge base (Trailhead) to facilitate to self-paced learning.

Team TechSur firmly believes in continuous improvement and seeks feedback after each training event to learn, adapt, and continuously improve training and system adoption.

Task 5: Security Requirements

Team TechSur has been supporting IT Systems for the Government for many years and is well-versed with federal government security requirements. We have worked for GSA, USAID, DHS, and SBA and

understand the implication of compromised security and breaches. At Team TechSur, we take security seriously, and all our employees take pride in going through required security training and agreeing to NDA execution. In addition, we comply with Government security terms, such as respecting the access level, safeguarding information and information systems, protecting sensitive information, and adopting the policies, procedures, controls, and standards required by the H.H.S. Information Security Program.

Team TechSur members have experience supporting "Incident Response" for Government and have a robust understanding of required support and reporting. We are fully equipped to comply and assist BPHC if such security incidents occur during the life of the contract.

As BPHC understands, Salesforce CRM provides a highly secure, highly available, FISMA moderate-compliant, FedRAMP-certified online environment based on NIST guidance. In addition, Salesforce's highly safe cloud environment is compliant with additional Federal security guidelines such as SAS 70 Type II, TRUSTe, SysTrust, and ISO 27001and Federal regulatory requirements (SOX, FDIC, SEC, and HIPAA). Salesforce is committed to maintain and continuously improve the security of the Salesforce Government Cloud and accounts for:

Exhibit 5. Salesforce incorporates security threats at multiple levels to protect against threats.

- **Defense-in-depth** – Whenever possible, multiple controls and technologies are applied to limit the possibility of any single point of failure;
- **Investment** – To manage, analyze, and improve security effectiveness, and invest in personnel, tools, and technologies;
- **Transparency** – Trust cannot be maintained without open communications regarding service performance and reliability. Salesforce strives to be the industry leader in transparency. Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. On this site, you will find:
  - Up-to-the-minute information on planned maintenance;
  - Information on Salesforce detected phishing, malicious software, and social engineering threats; and
  - Best security practices for your organization;
- **System and Organization Controls (SOC)** 1 examination semi-annually, SOC 2 and SOC 3 for Service Organizations audits, and compliance with PCI-DSS; and
- **Governance** of tools, people, and processes to ensure the security and privacy of the data.

With our in-depth understanding of the Salesforce CRM platform, Team TechSur is well-positioned to assist BPHC in establishing preventive measures, monitoring, and resolving security-related incidents.

Task 6: Federal Records Management

Team TechSur has been supporting IT systems for the Government for many years and has always supported the management of federal records. We understand the Federal Records Act (44 U.S.C. 31). The corresponding Code of Federal Regulations (CFRs) requires all federal agencies to maintain records that document their activities, file records for safe storage and efficient retrieval, and dispose of records according to agency schedules.

Team TechSur is knowledgeable and is equipped to assist BPHC with the following Federal Records Management responsibilities:

- Making and preserving records that contain adequate and proper documentation of the organization, functions, policies, decisions, procedures, and essential transactions of the agency and designed to furnish the information necessary to protect the legal and financial rights of the Government and persons directly affected by the agency's activities (44 U.S.C. 3101);
- Establishing and maintaining an active, continuing program to efficiently manage the agency's records (44 U.S.C. 3102) and
- Establishing safeguards against the removal or loss of records and making requirements and penalties known to agency officials and employees (44 U.S.C. 3105).

Task 7: Records Management Training

Team TechSur PM will ensure all our team members with access to Federal information or system or access to PII information will successfully complete the H.H.S. Records Management Training before performing any work under the contract. The PM will be accountable for tracking and reporting employee training status accompanied by certifications to COR. The PM will also ensure employees complete the annual refresher course during the life of the contract. The certification status of each TechSur team member will be submitted to the COR as part of the progress report. Any staffing changes and their certification status will be submitted to COR on subsequent progress reports.

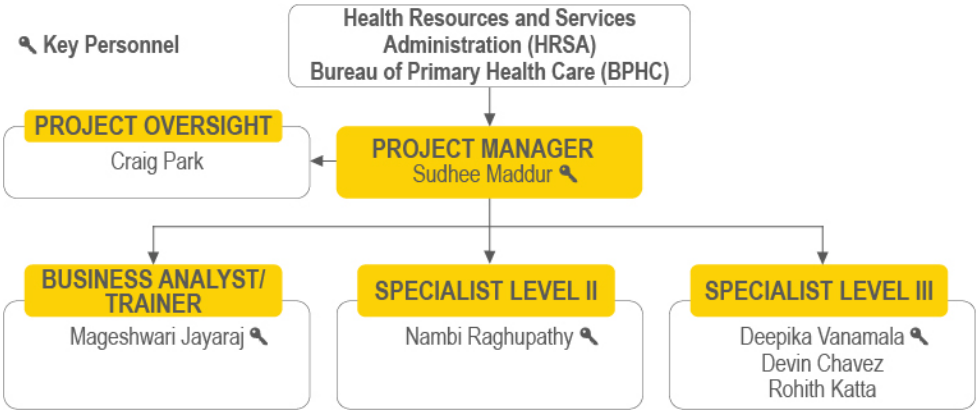
2 Management and Staffing Plan

Our organizational approach defines how Team TechSur will organize, staff, and manage the BPHC project. The Program involves significant complexity around solution development, management of concurrent calls and the need to effectively work with diverse stakeholder organizations. Success requires a high-performing team that understands the BPHC's mission and priorities, have the management experience to deal with complexity, and bring demonstrated experience in delivering solutions to BPHC's requirements. Based on these criteria we developed a program organizational approach and structure with the following benefits in mind:

- Establish clear lines of accountability for contract management and call performance;
- Maintain a lean, scalable organization to meet evolving call needs and changing priorities;
- Create/maintain clear paths for communication between Government stakeholders and contractor resources to ensure proactive decision-making and problem escalation; and
- Ensure optimized and shared use of resources leveraging the full power of our partners.

Our organizational structure, shown in **Exhibit 6** on the next page, features a clear chain of command and reporting relationships stemming from our empowered Project Manager.

Exhibit 6. Team TechSur Proposed Personnel



Organizational Accountability. Team TechSur's Project Manager is our Single Point of Contact (SPOC) and has accountability for program execution and success; collaborating closely with BPHC stakeholders to create a shared program vision, prioritize needs, and deploy our project teams to meet call goals. He is responsible for developing the Project Management Plan (PMP), managing/allocating the resources needed to successfully execute the work, driving day-to-day management within the constraints of the call budget, scope, schedule, and quality requirements, providing technical direction, and serving as the primary interface to the BPHC Project Leads. He is accountable to the TechSur Executive in Charge (EIC), Mr. Craig Park, who provides executive oversight and serves as an escalation path for any issues or concerns raised by BPHC. The PM has direct reach back to TechSur's corporate resources for operational Support and to our teaming partners through Partner Engagement for all contractual, resource, or performance-related matters.

Team TechSur will operate as a single integrated project team (IPT). All subcontractors are accountable to the PM and will be subject to the same contractual terms and conditions as TechSur through a flow down in their subcontract. Each subcontractor provides TechSur a SPOC for escalation and resolution of issues or concerns, as well as establishing and maintaining open communications channels to collaborate efficiently and eliminate redundancies in effort. TechSur requires all subcontractor staff to use our time collection system to ensure consistent monitoring and reporting.

Expediently staff new requirements or fill existing vacancies. Staff resources for calls are drawn from a matrixed Multidisciplinary Resource Pool of business and technical experts consisting of the combined resources of Team TechSur, allowing us to provide the right resources at the right time to meet call requirements. All staff assigned to the Program operate as a single, integrated team, regardless of company affiliation.

Task Management and Control Process. TechSur's approach to project lifecycle management, shown in **Exhibit 7,** is derived and supported by our focus on quality management and our investment in and adherence to CMMI Level 3 and ISO 9001:2008 quality processes. We provide a Project Management Plan (PMP) that governs all work and establishes processes tailored from our corporate assets and incorporates BPHC input.

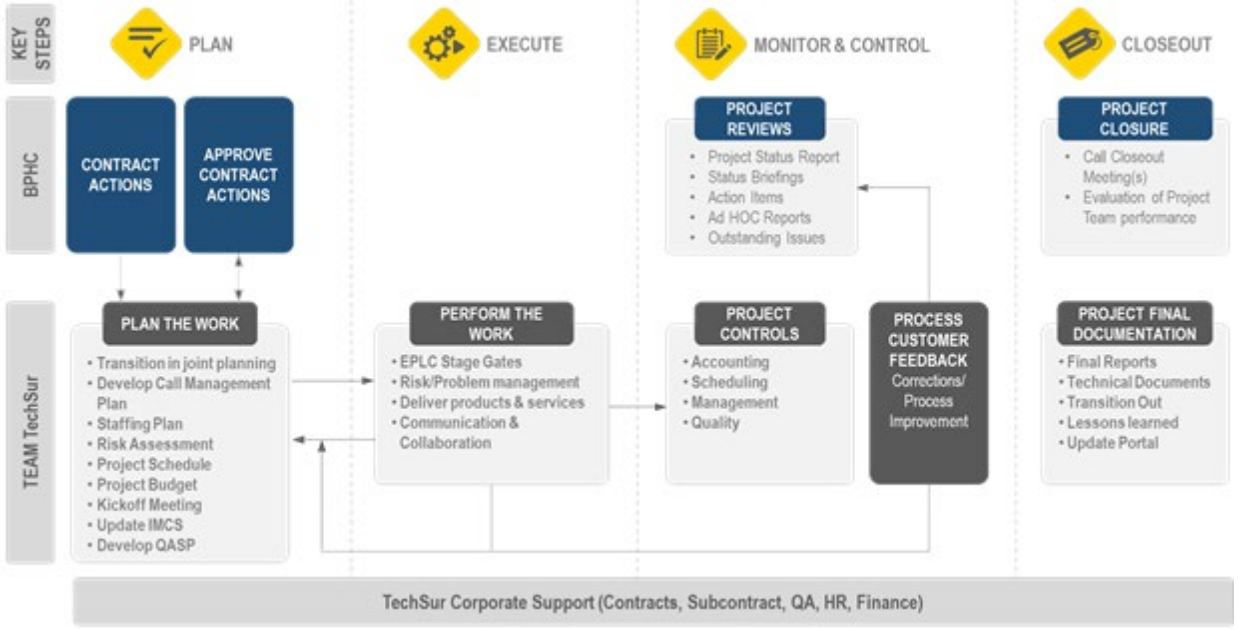
Following the award, Team TechSur establishes the PMP, budget, schedule, Quality Assurance Surveillance Plan (QASP), and staffing, and conducts a kickoff meeting with the COR and other stakeholders. We measure and report on project progress, performance, and quality throughout the contract. We monitor individual task performance on a weekly basis against its planned budget, schedule, and forecasts; and measure and report variances in the cost and schedule over the project's life. We use an integrated management control system (IMCS) consisting of our CostPoint financial accounting system,

Deltek time and expense collection tool for recording all labor hours and expenses, Microsoft Project, and our corporate data warehouse to provide our PMs with real-time information so they can manage finances and schedule effectively, and support BPHC reporting requirements. Team TechSur has a daily time collection policy with which all project staff must comply.

Our IMCS is used to generate reports such as the integrated project schedules (IPS), monthly status reports, earned value management (EVM) reports, resource utilization reports, and ad hoc reports based on individual task requirements. If required under the contract, we generate standard EVM reports that are compliant with ANSI/EIA 748's 32 criteria. Our EVM reports typically are generated by the 15th of each month; however we can accelerate that schedule if BPHC requires.

As needed, we will manage corrective actions to closure when the call's performance or results deviate from the QASP and impacts budget, schedule, quality, or client satisfaction. We will perform periodic quality reviews/audits in accordance with the PMP. Deviations from expected quality levels will be reported and a corrective action plan put in place. We will produce and deliver monthly status reports which document call status, performance, resource expenditures, and risks.

Exhibit 7. Team TechSur's Task Management and Project Control Approach



Communication, Interfacing, and Reporting. Team TechSur is committed to comprehensive, transparent, and timely communication with BPHC program staff and stakeholders. Our PMP will include a Communication Plan (CP) to provide a framework for the exchange of relevant project information to all collaborators both within and outside individual calls and Delivery Teams, focusing on formal communication elements. Examples of our reporting and communication methods for the contract include kickoff meetings, weekly status meetings/reports, interim reports, and monthly status meetings/reports which will be shared with the appropriate BPHC stakeholders. In addition to the formal communication channels, other communication channels exist on informal levels, which encourage an open, ongoing dialogue between stakeholders that is critical to the ongoing BPHC program success. Our CP is designed to deliver visibility into planning, performance, and health at all Program levels. As depicted previously in **Exhibit 7**, there are two formal lines of interfacing between the BPHC and Team TechSur. First, the BPHC CO and COR will interface directly with the PM for contractual issues and the overall contract

health and progress. Second, the COR and Project Leads will interface with the Task Leads for specific delivery progress.

Managing and Communicating Risks. We take a "no-surprises" approach to managing and communicating risks which is based on transparency and continuous collaboration. Team TechSur uses a CMMI-Level-3-compliant risk management approach that has been successfully implemented on numerous projects. We organize risks based on category, management, technical, cost, schedule, etc. and track them in our IMCS which allows us to assess at the appropriate levels and prioritize high-impact, high-probability risks. The TechSur Risk Management and Mitigation process is depicted in **Exhibit 8**.

Exhibit 8. Team TechSur Risk Management and Mitigation Process

Availability, Retention, and Resource Allocation. Our approach to attracting and retaining talented personnel is shown in **Exhibit 9**. The principles behind this process are to: recruit and hire talented individuals, provide professional development necessary to help them excel and grow, and provide competitive compensation and benefits to retain them.

Exhibit 9. Team TechSur Staffing Management Approach

Availability. To support the BPHC, Team TechSur has identified a team of highly skilled resources with in-depth knowledge of the Salesforce systems, data, and business operations. Team TechSur's resources are already familiar with HRSA's priorities and processes, and ready to start on Day 1, reducing program ramp-up time. As additional needs arise or priorities shift, we have the ability to mobilize resources quickly drawing from our existing Team TechSur Multidisciplinary Resource Pool. TechSur's capabilities are provided by professionals, including Analysts, Designers, Functional Experts, Software Developers, and Agile Project Managers. More than 90 percent of our staff is dedicated to improving the mission efficiency and effectiveness of U.S. Federal agencies by leveraging innovative technology, data, and analytic solutions.

Retention. TechSur's corporate retention processes are proven to attract and retain skilled experts through our opportunities for professional development, monetary incentives, flexibility, benefits, and progressive employee support initiatives. TechSur is dedicated to providing a supportive culture for our

employees to develop their skills, advance their careers, and be recognized for their excellent work. These efforts translate to personnel/workforce stability for Government customers throughout longer-term contracts and assignments. Our organizational structure lends itself to increased retention. Self-organized Agile teams are more engaged and express higher job satisfaction resulting in higher retention. TechSur offers tuition reimbursement for accredited universities and an extensive in-house training program.

Resource Allocation. Immediately following contract award, Team TechSur will mobilize its outlined team of key personnel and SMEs to begin to identify the most key aspects of BPHC's operations. We actively cross train and develop "two-deep" backup personnel in key roles, reducing program risk without increasing costs. Our team's scale allows us to allocate the right resources on a part-time basis if required. BPHC is getting the finest expertise allocated to the call for an appropriate proportion of time.

We begin our resource allocation process for a particular call by understanding the scope of work, timelines, and priorities in consultation with the COR. Once the PM has a clear understanding of the priorities and approximate starting timelines for those priorities, the PM works with the BPHC to compile the types and number of resources needed. Should specialized skills be required that are not available in the multidisciplinary resource pool, we work together with our partners in identifying and recruiting the appropriate talent.

Workload Balancing/Resource Allocation. Team TechSur's staffing plan uses dedicated resources brought in to support BPHC. We will use 6 unique individuals, all of whom are available to work on this project as their primary assignment. Our delivery team resources take responsibility for analysis, development, and maintenance, support (Tier 2 and Tier 3), and work from a common product backlog which is prioritized in each Sprint. The benefit is cross training and knowledge retention within the team. This approach provides specialized skillsets to BPHC at the most optimal allocation.

Quality Management and Ensuring Quality Deliverables. Team TechSur's quality assurance plan (QAP) framework will be employed in contract execution. Our QAP describes not only how we verify that products delivered satisfy contractual agreements, but how we meet BPHC's client quality expectations and strategic goals. Our quality control (QC) processes ensure that we meet and/or exceed the performance objectives for product reliability and integrity through all phases of delivery. Our processes provide instructions for carrying out QC, configuration management, requirements management, data management activities, and reaching critical milestones.

Exhibit 10 below depicts our quality methodology to monitor tasks and deliverables, identify deficiencies before they present a problem, and define the QC activities that enable us to exceed evaluation standards. Our quality methodology verifies that all deliverables and work products satisfy or exceed expectations set by requirements.

Exhibit 10. Team TechSur's Quality Management Methodology

This methodology arms our team with tools and processes to conduct quality reviews and audits by examining products and processes to assess compliance with specifications, standards, contractual agreements, or other criteria. For all tasks and deliverables, we review and audit our work to confirm that we are following proper control procedures, maintaining required documentation, and providing reports that accurately reflect the status of activities. We perform regularly scheduled and unscheduled process and product reviews and track them from start to finish. We use the following types of reviews:

- **Deliverable Reviews** – Inspect all deliverables and interim work products to ensure compliance with acceptable quality levels (AQLs). We use a scoring method to provide the technical teams with a "delivery confidence" rating that indicates acceptable quality and where improvements are needed;
- **Peer Reviews** – Conduct internal team peer and document assessment reviews. These reviews are especially useful when evaluating document or deliverable content, accuracy, and completeness;
- **Process Reviews and Audits** – Conduct process reviews throughout the call lifecycle to ensure the teams conduct the work in accordance with Team TechSur's CMMI and ISO-compliant, best practices, and, as appropriate, the contract requirements; and
- **Quality Audits** – TechSur's Corporate Project Management Organization (PMO) conducts proactive reviews to identify problems and performance issues and establish any needed course corrections.

3 Technical Approach

Team TechSur's depiction of BPHC's SOW understanding and challenges have been detailed in Section 1 of this proposal. Also located in Section 1 are the details of exactly how we propose to achieve the scope and objectives by each of the seven tasks. This section focuses on Team TechSur's technical approach to meet all of the seven tasks from the viewpoint of Systems Administration with Tier 2/3 Support, creating training and job aides/material for participants, defining and developing solution enhancements, and describing ow we will execute on overall day-to-day operations to effectively improve processes, enhance the users' experience, and provide efficiency improvements for the BPHC Salesforce CRM.

3.1 Tier 2 Support and Tier 3 Support

Team TechSur Tier 2 and Tier 3 support services are critical to ensure all internal or external users receive a professional and fulfilling user experience. We understand that Team TechSur will be the BPHC

Salesforce Support Services and resolve Tier 2 and Tier 3 issues. The subsections below describe our processes, tracking, and resolution methodology.

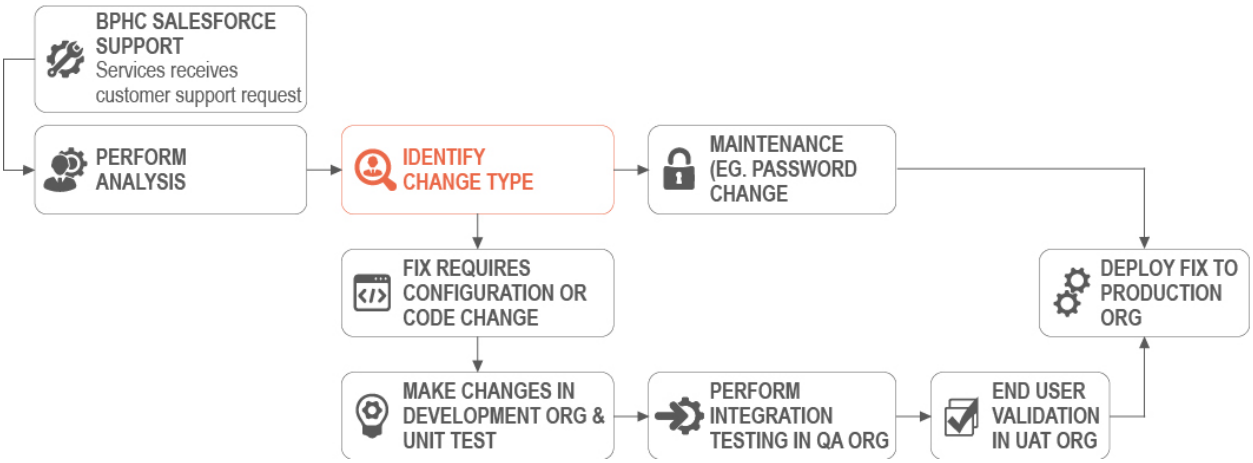
3.1.1 Tier 2 Support

Team TechSur is experienced in handling Tier 2 issues and is anticipating users to report the following types of Tier 2 issues:

- Permission errors;
- Registration errors;
- Workflow errors;
- Salesforce Community errors;
- "How To" – System-related questions;
- Assistance with new functions;
- Addition of resources;
- Maintenance of User Accounts and Passwords Resets;
- Changing of Profiles for existing Users;
- Configuration of Reports and Dashboards;
- Management of Basic Configuration Changes (e.g., Add Instructions, Change Field Label);
- Updates to Existing Forms (Adding New Fields, Renaming Fields, Removing Fields);
- Modification of Email Templates;
- Permissions;
- Data quality issues; and
- Integration issues.

The resolution to Tier 2 issues may require changing the existing configuration, code, or a new patch. Therefore, Team TechSur will follow a thorough process as depicted in **Exhibit 11** below to ensure that the upgrade to the Salesforce CRM happens seamlessly and does not impact existing functionality.

Exhibit 11. Team TechSur Approach for Analyzing and Resolving Customer Issues



1. A BPHC ticket within Salesforce is created to capture the user support request. The ticket goes through an in-depth analysis and is tagged for the following:
   - "How To Question" or Maintenance (e.g., adding users, changing password, granting permission);
   - Configuration Changes (e.g., creating reports, creating dashboards, changing forms, email template changes);
   - Code Change (e.g., change to Apex, VisualForce, or Trigger);
   - Tier 3 Changes (defects related to Salesforce CRM platform or third-party tools); and
   - Enhancement – Building new features.
2. "How to Questions" are responded to right away, and maintenance issues are addressed directly in the Production org.
3. Any "Configuration" and "Code" fixes require an issue to go through the Salesforce development cycle involving:
   - Developer performs the fix in the Developer Sandbox and then conducts unit testing;
   - Fix is then promoted to the QA Sandbox, and a QA engineer performs integration testing to make sure the fix does not impact existing functionality;
   - Fix is then moved to UAT Sandbox for end-user verification; and
   - Upon end-user verification, the fix is promoted to Production Org.
4. Final smoke testing is completed in the Production Org to ensure that the solution is working as intended.
5. For issues classified as enhancement, it is presented to the COR and the appropriate BPHC representative for approval and prioritization. Once the ticket is prioritized, it goes through the Salesforce Development cycle listed above.
6. See the section below for Tier 3 tickets resolutions.

Team TechSur understands that customer satisfaction is of the most importance and provides a constant oversight to resolve tickets promptly. Our PM and Specialist Level II consistently monitor tickets, ensuring we continue to meet and exceed BPHC Salesforce Support Acceptable Quality Levels (AQLs).

3.1.2 Tier 3 Support

When issues need to be escalated to Salesforce or third-party vendors (e.g., CloudCoach), Team TechSur will follow the following steps to ensure all escalations and feature enablement are handled smoothly

Escalation: Team TechSur will create a ticket internally and with Salesforce/vendor technical support to report the technical issue and escalate as required. As a part of the daily standups, Team TechSur will update the ticket's status based on any responses from Salesforce. Any resolution from Salesforce/vendor, like enabling features, increasing limits, etc., will be done in lower Sandbox orgs first and tested thoroughly before the feature is enabled for the integrated sandbox and Production.

3.2 Creation of Training and Training / Job Aide Materials for Participants

Team TechSur believes that end-user preparation and support are as important as the system's quality. The best possible system falters and can fail if the end user is not adequately prepared. Therefore, a comprehensive training plan is critical to the successful adoption of a system. The training program as requested in the RFP must be all-encompassing and, at a minimum, will include:

- Instructor-Led Training – (Traditional classroom)
- Virtual Instructor-Led Training – (Online live Training)

- BPHC-specific, customized micro-learning videos
- Staff Briefings, Brown Bag Sessions, or Office Hours
- Instructor and Student Guides, Exercise Guides
- Guidance on Salesforce self-paced learning (i.e., Trailhead)
- Hands-on Training in a Salesforce Sandbox
- Training Evaluation Tool

Team TechSur will rely on their extensive training experience to develop and deliver a comprehensive training program for BPHC. Throughout the training rollout, the Team TechSur will continually review the quality of the training materials and trainers to ensure the end-user is receiving clear and concise instructions on the use of Salesforce CRM.

Team TechSur's training approach ensures that all system users have a complete and comprehensive understanding of all areas of functionality. Additionally, it is equally important that a training program be designed to measure learning results rather than merely track attendance. Therefore, team TechSur will develop Outcome Based Training to validate that users benefited from the training experience. Our standard approach to Training is based upon a well-established, instructional system design (ISD) methodology, referred to as ADDIE (Analysis, Design, Development, Implementation, and Evaluation) (**Exhibit 12**).

Exhibit 12. Ongoing and Continuously Improving Training Approach

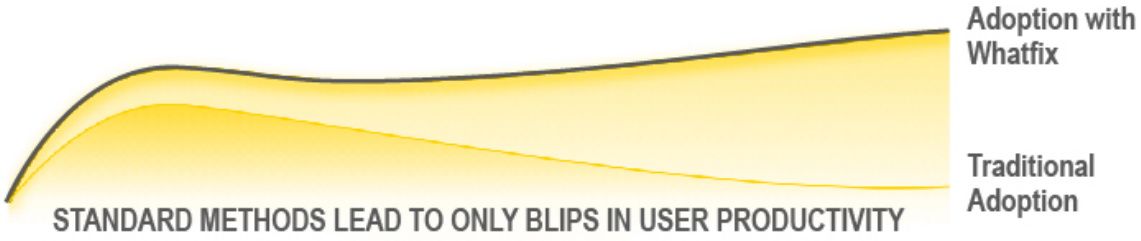
Step 1: Analysis – Team TechSur will analyze the current situation in terms of training, knowledge gaps, etc. We will meet with the BPHC cohort point of contact and Salesforce leads to identify training needs. Additionally, gaps will be determined by reviewing and identifying patterns from the reported customer issues. The outcome of this step will establish training needs (topics) and a training plan.

Step 2: Design – This step includes devising strategy, delivery methods, structure, duration, assessment, and feedback. The goal is to create a blueprint of training courses and seek BPHC feedback before developing any content. The blueprint includes training format (Instructor-Led, Virtual Self-Paced), duration, etc.

Step 3: Development – Based on the agreed-upon course blueprint, we start creating training material or updating existing material as new features are built, and existing functionality is enhanced. We follow an iterative process where we test the course to ensure there are no basic errors (grammar, spelling, syntax, etc.), emphasizing navigation and proper flow. The content is created using different tools. For example, self-paced modules are developed using interactive instructional authoring tools.

When it comes to Salesforce CRM, users are often faced with endless options and features to learn which can get overwhelming for the end users. Therefore, it is essential to consider using a method to maximize resources, time, and money. Team TechSur has experience with Digital Adoption Platforms (DAPs) such as WalkMe and WhatFix, which adds a guidance layer on top of Salesforce CRM. This layer simplifies the user experience and guides users to task completion with on-screen Walkthroughs. **Exhibit 13** below shows the accelerated adoption with DAP.

Exhibit 13. Digital Adoption Platform Value



During the development, we also ensure all our training content is Section 508 compliant. This is because we understand making the content accessible to people with disabilities is the law. For example, when it comes to videos, we account for the following elements:

- **Captions** – The audio parts of the video appear as text at the appropriate time and give access to hard of hearing or deaf people;
- **An audio description** – A description of a video's visual elements gives blind or visually impaired people access; and
- **A 508-compliant video player** – Ensures a person who requires keyboard navigation or an assistive device can navigate the window where the video plays (that is, the video player).

Step 4: Implementation – This is the step where training is delivered and includes setting up a course, taking care of enrollment, assessment, and collection of feedback.

Step 5: Evaluation – Getting feedback on every aspect of the courses is necessary to improve and revise the content. We use the feedback to understand:

- Did we meet the goals as set out in the Analysis phase;
- Identify other training requirements; and
- Discover possible change in media types or approaches.

The above step will also set the framework for measuring Team TechSur training delivery against Salesforce Training Acceptable Quality Levels (AQLs).

3.3 Quality Control and Reporting

Team TechSur understands capturing quality data from end users is key to the success of any implementation. As a part of the application design, Team TechSur follows the following principles to ensure that quality data is captured from the end users to ensure accurate reporting and seamless integrations:

- **One Entry per data element** – Team TechSur ensures that one field is captured only once from the end user throughout the application. If the field needs to be displayed again or used for processing, we will query the single field entered by the user, preventing repetitive entry by the end user, which significantly reduces user error and improves data quality.
- **Maximization of Picklist fields** – To the greatest extent possible, Team TechSur will ensure that maximum data entry happens from the end user in the form of picklist fields. This will ensure the users can enter the data quickly and without errors. In addition, an option of "Other" will be provided in all picklist fields, and a text box will be provided to capture the values outside of the drop-down values provided.

- **Required fields** – Team TechSur will work with BPHC to identify the critical reporting objectives, and based on the findings, some aspects in the objects will be made as required fields on the page layout. This will ensure no incomplete records are submitted for report processing.
- **Validation Rules** – Validation rules will be written to ensure that data entered by the user meets specific standards. Validation rules can also be used to ensure that particular fields can be made conditionally required. When records are saved, the data is checked to make sure that it follows the format. For example, to make a standard field required, you can use a validation rule that checks to see if the field is blank. You set up validation rules for phone, credit card, and customer I.D. fields. You also set up validation rules to make standard lead contact information fields required.
- **Auto-Population of Data Fields** – Team TechSur will auto-populate the defined data fields using formula fields, workflow field updates, or business process trigger logic written in APEX code. Team TechSur will work with BPHC to determine the auto-populated fields list and the appropriate business logic for populating these fields. Based on the input provided by the stakeholders, Team TechSur will develop the required formula fields, workflow field updates, or APEX triggers.
- **Creation of Data Elements Using Formulas:** Data within a formula field are automatically updated by Salesforce based on the formula's logic. For instance, if the annual payment for a particular customer is $1,500, we can calculate the monthly payment using this data field by creating a formula field. In addition, Salesforce provides the flexibility to handle multiple data types within the same formula field. Also, it offers a library of functions that can be used to create new data elements.
- **Creation of Data Elements Using Triggers:** Data elements created using formula fields are read-only and have specific limitations in the context of cross-data table population and reporting. These challenges can be overcome by the use of Salesforce APEX triggers (back-end code). Salesforce APEX triggers can be used to populate data elements with logic based on pre-defined calculations and data from any data table in Salesforce

3.4 Configuration and Development of Recommended Solutions that Improve BPHC's Business Processes and Crisis Response and Recovery Capacity

Agreed-upon configuration, enhancements, application developments, and AppExchange-based augmentations to BPHC's CRM will be performed using our time-tested procedure to analyze, define, develop, test, and deploy cost-effective changes to the CRM. The technical steps of this process are described in this section.

Analysis: Team TechSur will work closely with BPHC to analyze the current system and document the pain points and areas of improvement. Team TechSur will work with the identified stakeholders to collect business requirements for 50 planned enhancements. Based on the business requirements analysis, Team TechSur will recommend different solutions/applications to be developed as a part of the implementation. Team TechSur will also perform the Build vs. Buy analysis as many applications can be downloaded from the AppExchange if needed. Based on the determined solution, Team TechSur will also provide a high-level roadmap for implementing recommended solutions. **Exhibit 14** below shows the steps that Team TechSur to configure and develop recommended solutions.

Exhibit 14. Methodical Approach to Elicit, Refine, Estimate, Prioritize, and Approve Requirements for New Features

Capturing and Refining Requirements: For each solution recommended by Team TechSur, individual ticket items will be created in the tracking system. We will use the existing BPHC tracking tool to collect and maintain Requirements and Bugs. Requirements and bugs will be further broken down and refined using ongoing Backlog Refinement sessions. Business requirements will be translated into a User Story format inclusive of Acceptance Criteria which will capture "What" needs to be delivered for a component to be considered "Done." New features or complex features/business function changes will include wireframes/mock-ups to help clarify proposed designs. Following the Refinement sessions, Team TechSur will create and post detailed meeting minutes and update the requirements repository. **Exhibit 15** below describes Team TechSur's backlog Refinement session process.

Exhibit 15. Backlog Refinement Sessions Process

Goal	Gather user requirements
Task Type	• Meeting (1-2 per week). Duration 1.5 Hours
Input	• Product Roadmap • Top Prioritized Requirements
Output	• Approved User Stories inclusive of acceptance criteria in the BPHC tracking tool
Process	• Backlog Refinement sessions are used to elicit/confirm requirements from stakeholders • Team TechSur BA facilitates backlog Refinement sessions • Ongoing sessions throughout the Product Lifecycle to further gather, define and confirm User Stories with acceptance criteria.
Attendees	• BPHC Stakeholders and SME • Team TechSur Solution Architect (Specialist II)– primary solution owner • Team TechSur UI Expert – provides UI guidelines • Team TechSur SME • Team TechSur BA • Team TechSur Technical Lead – supports solution architect

Solution Design: For each approved ticket item, Team TechSur will design the solution based on the following factors:

- Best practices recommended by Salesforce;
- Decision on Build vs. Buy from AppExchange;
- Design using a combination of standard and custom objects but minimize the use of custom objects;
- Recommended business process changes that can be seamlessly implemented in Salesforce;
- Design forms and fields which enable users to enter data easily and with minimal errors;
- Design pages that work seamlessly on all browser and device types;
- Design solution using the latest available lightning framework; and
- Design real-time automation and batch automation to ensure the performance of the system is not affected.

Once user stories have been captured, acceptance criteria documented, and wireframing has been completed, ongoing technical solutioning is performed, and the system design document is updated. **Exhibit 16** below provides the solution architect steps taken to meet specified goals.

Exhibit 16. Solution Architecture (ongoing, as needed)

Goal	Define High-Level Technical Solution
Task Type	• Ongoing solutioning • Backlog Grooming meeting used for this • Additional meetings scheduled as needed
Input	• Finalized User Stories • Finalized Wireframes
Output	• Technical Solution added to User Story – to be refined further by Agile Team • Updated technical documents containing information on the list of standard objects to be used, list of custom objects to be developed, list of triggers, and other automation to be implemented
Process	• Team TechSur Solution Architect collaborates with BPHC Salesforce Change Control Board on technical solution
Attendees	• BPHC representatives and SME • Team TechSur Specialist (II & III) • Team TechSur BA

Solution Development: After the solution design has been approved, the development is performed in designated sandboxes for each identified module. Team TechSur uses the following practices for Salesforce CRM apps:

- **Leverage Salesforce development environment is known as Force.com IDE.** Force.com IDE is a complete integrated Salesforce development setup fully equipped to develop Force.com apps having Apex, Visualforce, and metadata components.

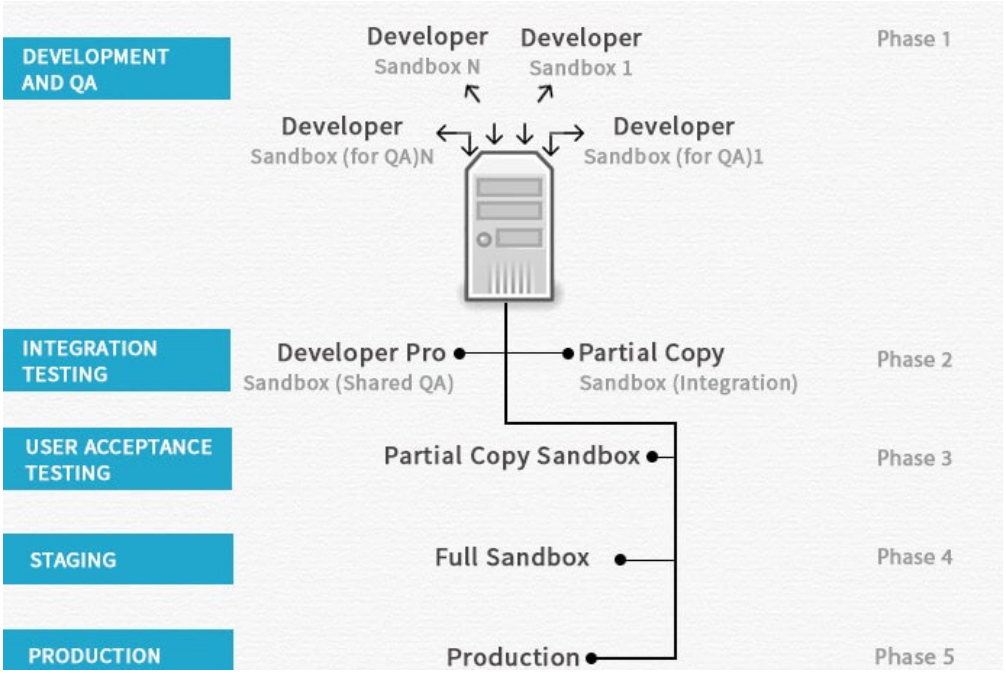
- **Source Control Setup.** We recommend creating a separate GIT repository for every project with the default repository branch acting as the Master branch. All production metadata is in the Master branch.

- **Coding Practices.** Development begins with the developers creating their separate sandboxes. These sandboxes usually contain a copy of the main production app and all the associated Salesforce configuration information. The developers then use Force.com IDE to connect their sandboxes and retrieve all necessary metadata from sandbox to IDE. Finally, developers commit the code to the GIT repository as they build up their assigned app features.

- **Code Review.** All solutions developed are reviewed internally before being promoted to the unit, regression, and integrated testing. The developed code is checked against the TechSur CRM Development Checklist. Our checklist and coding standards document are rooted in best practices and informed by past experiences implementing similar services. A few pointers from our checklist are mentioned below:
  - Check for Bulkification in the code to ensure a large amount of data can be processed without failures;
  - Avoid SOQL Queries inside FOR loops;
  - Implement Collections wherever possible;
  - Avoid multiple triggers on the same object;
  - Avoid hard-coding IDs;
  - Avoid lengthy functions and classes;
  - Use standard Apex SOQL format;
  - Check for NULL pointer exceptions;
  - Use Custom Settings, Custom Metadata, or Constants class to store static data;
  - Never use custom labels for storing static data;
  - No queries and DML inside getter methods;
  - Use Custom Labels for frontend messages;
  - Use relative comments and appropriate naming conventions in your code;
  - Add appropriate exception handling; and
  - Maintain apex class code coverage at 80%.

Exhibit 17 below shows Team TechSur's Salesforce Testing Approach.

Exhibit 17. Robust Approach for Testing of Salesforce CRM Applications



Functional Testing: Once a developer has completed unit testing, TechSur's QA expert performs functional testing, described in **Exhibit 18** below, within the sandbox. The QA expert will migrate the code from the GIT repository to their own sandbox and then test it. We recommend continuous testing throughout each Sprint as newly developed functionality is continuously integrated into the code baseline. Team TechSur will leverage a testing tool such as TestRail / MS Team Foundation Server to perform testing and track test execution results (pass/fail).

Exhibit 18. Functional Testing Tasks

Goal	Continuous Functional Testing during Sprint
Task Type	• Ongoing during a Sprint
Input	• User Stories/Wireframes • Acceptance test criteria • Test Plan and Scenarios
Output	• Requirement Traceability Matrix (RTM) • Functional Test Cases with steps performed and expected results. • Defects found during testing will be entered into the BPHC ticketing system and linked to associated user stories.
Process	• Test Scripts are created to test each User Story/scenario/acceptance criteria. • For each implemented User Story, manual functional testing is performed • Test cases associated with each User Story are updated to reflect test pass/fail
Attendees	• Agile Team Tester – writes test scripts, performs tests

Integration/Regression Testing: Code developed during a sprint often has dependencies with other code. Regression testing minimizes the risk of 'breaking' or invalidating code developed during a sprint when completed and checked into the source code repository and promoted to an integration environment. Team TechSur will perform automated regression testing (see **Exhibit 19** below) using Provar or Selenium. Since the purpose of regression testing is to facilitate how change impacts the code base, not all requirements/user stories will be included in the regression test repository. As part of the requirements validation/approval process, Team TechSur will perform an impact analysis of proposed changes to determine if requirement changes will impact other system components. If no impact is identified, then the requirement may not be included in the regression test. For example, changes to a workflow item would be included in the regression test, but adding a new read-only field may not be. Team TechSur expects creating/modifying regression tests will occur as sprint work, but the execution of automated testing may occur in a later sprint.

Exhibit 19. Regression Testing Tasks

Goal	Regression Testing at the end of each Sprint to validate existing functionality
Task Type	• Automated testing at the end of each Sprint
Input	• Sprint Backlog • Test Plan
Output	• Requirement Traceability Matrix (RTM) • Changes to Automated Regression Test Script • Test result report • Defects entered into BPHC ticketing system
Process	• Automated Regression Test Scripts are created to test each User Story (if identified as having external dependencies) • Automated Test Script is modified or created to account for new/changed requirements. • User Story is updated to reflect test pass/fail
Attendees	• Agile Team Tester – writes regression test scripts, perform an automated test

User Acceptance Testing (UAT): After all requirements have been regression tested, Team TechSur will conduct an end-to-end UAT process with all key stakeholders in the UAT Sandbox. All feedback from stakeholders and bugs reported will be captured in a UAT document, and bugs will be fixed before production deployment.

Final Release to Production: After completing the above testing, the app is then tested for performance. We recommend conducting performance testing in a Staging (full-copy) Sandbox with all the production environment's configurations and data. Next, the team performs rigorous performance testing, and upon passing of all service level agreements, the final app is now deployed in the production environment.

3.5 Execution of the Day-to-Day Support, Maintenance, and Improvement of BPHC's Salesforce CRM Platform

Team TechSur will follow the following processes to ensure day-to-day support, maintenance, and improvement of the Salesforce CRM platform:

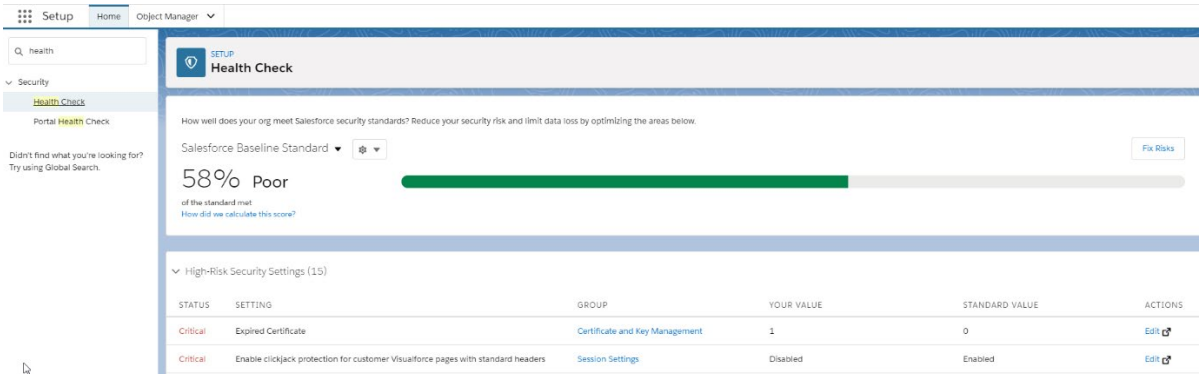
- **Day-to-Day Support for User Issues –** Refer to our description above under section "1. Understanding of the Project – Task 3 Systems Administration" and section "3. Technical Approach – Tier 2 and Tier 3 Support" for details on recommended processes and resolution approaches.
- **Monitoring Scheduled Jobs**: Team TechSur will monitor any batch processes that have been set up and ensure all batch jobs are getting executed successfully. Any errors generated in batch jobs will be analyzed, and a BPHC ticket will be created to fix the same.
- **Monitoring Apex Error Emails**: Team TechSur will monitor any error emails that are generated from the system. The error emails will be analyzed, and the same will be recreated in a sandbox. A ticket will be created to fix the issue and ensure no similar emails are being generated in the future.
- **Running Field Reports**: Team TechSur will regularly run Salesforce field reports to ensure that all fields are utilized. Based on the results provided by the field report, Team TechSur will create tickets to improve the system continuously.
- **Latest Package of AppExchange applications**: Team TechSur will ensure that all applications installed from the AppExchange are running on the latest version provided by the organization. This will ensure that any bugs identified in the previous versions of the application are fixed.
- **Monitoring Health of Salesforce Org**: To ensure stability and optimal performance, Team TechSur will regularly monitor the Salesforce CRM environment for the following:

Exhibit 20 below shows how Team TechSur monitors Salesforce environments to ensure proactive measures and optimal performance from Salesforce CRM.

Exhibit 20. Apex Cost Coverage, API Usage, and Entity Limits

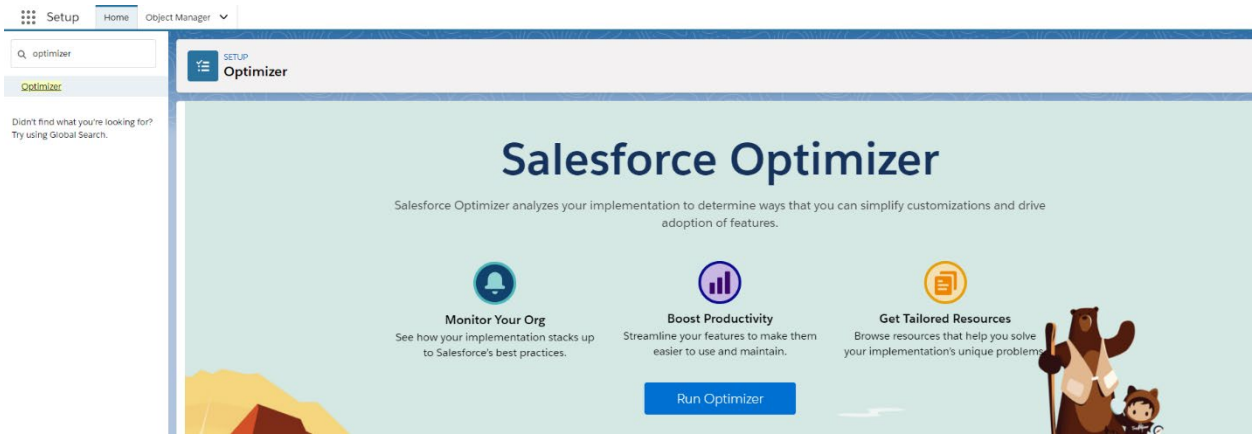
Exhibit 21 shows the Salesforce security health check details and analysis that allows for actions to be taken as appropriate for a secure BPHC environment.

Exhibit 21. Security Health Check



Salesforce Optimizer is used to determine ways for streamline customizations and drives adoption of feature functionality (**Exhibit 22**):

Exhibit 22. Salesforce Optimizer



4 Key Personnel

Team TechSur will staff the team that will support BPHC with resources that collectively have the diverse skills, experiences, and aptitudes required to deliver this project successfully.

Team TechSur is proposing six personnel to support the BPHC project, with Mr. Sudhee Maddur serving as the Project Manager. Mr. Maddur is our Single Point of Contact (SPOC). He has accountability for program execution and success, collaborating closely with BPHC stakeholders to create a shared program vision, prioritize needs, and deploy our project teams to meet call goals. He is responsible for developing the Project Management Plan, managing/allocating the resources needed to successfully execute the work, driving day-to-day management within the constraints of the call budget, scope, schedule, and quality requirements, providing technical direction, and serving as the primary interface to the BPHC Project Leads. He is accountable to the TechSur Executive in Charge (EIC), Mr. Craig Park, who provides executive oversight and serves as an escalation path for any issues or concerns raised by BPHC. Mr. Maddur has direct reach back to TechSur's corporate resources for operational support and our teaming partners through Partner Engagement for all contractual, resource, or performance-related matters.

Our proposed staffing for key positions brings more than 40 years of combined experience in the Salesforce technical and management domain and is ready to start from Day 1. **Exhibit 6** earlier in this response shows the key personnel identified to support the BPHC implementation.

Each team member has the experience and qualifications to provide the services requested in this RFP. **Exhibit 23** below provides the relevant qualifications for each key proposed project team individual. In addition, Team TechSur provides resumes detailing relevant expertise for each proposed project team individual in Appendix A.

Exhibit 23. Key Personnel Qualifications

Name Proposed Role and Responsibilities	Education	Qualifications
Sudhee Maddur *Project Manager– Responsible for overall project delivery, customer engagement, schedule, and cost controls*	▪ MS, IST, George Washington University, Washington, DC ▪ Masters in Computer Applications (MCA), JNT University, Hyderabad, India	**Technical Domain:** ▪ Project Management & Product Owner ▪ Business Solution Development ▪ Requirements Gathering & Management ▪ Legacy systems modernization ▪ SaaS product solutions ▪ Cloud migration and Cloud implementation using Salesforce, AWS, and Azure ▪ Risk management ▪ Financial management **Certifications:** ▪ Active Project Management Professional (PMP) certification - License 239594 ▪ Ex-Chair - PMIWDC - Loudoun Community ▪ Certified Salesforce Administrator & Certified Sales Cloud Consultant - Active
Mageshwari Jayaraj *Business Analyst/Trainer– Responsible for gathering and refining requirements and being a conduit between BPHC business stakeholders and the TechSur technical team. BA will also play a key role in outreach and training activities.*	▪ Master of Business Administration from Pondicherry University, India ▪ Bachelor of Technology in Electronics and Communication Engineering from Pondicherry	**Technical Domain:** ▪ **Programming Languages:** C++, Java ▪ **Databases & Packages:** SQL developer, SQL server. ▪ **Tools & IDEs:** Salesforce CRM, Eclipse IDE, Intelli J, MS Visio, iPlotz, Azure, JIRA, Jenkins, Team Foundation Server, Rally, Scrumwise, Trello, MS Office, MS Project. ▪ **SDLC:** Waterfall, Agile. ▪ **Other Technologies:** HTML5, CSS3, Java Script, AJAX, XML, XSLT, JSP, Servlets, SVN.

Name Proposed Role and Responsibilities	Education	Qualifications
	University, India	**Certifications:** ▪ Certified Scrum Master ▪ Salesforce Certified Administrator
Nambi Raghupathy *Specialist Level II– Responsible for devising architecture and solution design. Also, providing technical guidance and reviewing work performed by Specialist III. The main focus is designing and developing custom solutions*	▪ Master of Business Administration (MBA) – Sam M Walton College of Business, University of Arkansas ▪ Bachelor of Engineering – Electrical and Electronics, PSG College of Technology, India	**Technical Domain:** ▪ Salesforce Service Cloud ▪ Salesforce Sales Cloud ▪ Customer and Partner Communities ▪ AppExchange Product Development **Certifications:** ▪ PMP Project Management Professional - PMI Institute ▪ Salesforce Certified Administrator ▪ Salesforce Certified App Developer
Deepika Vanamala *Specialist Level III– Responsible for ensuring Task 3 –System Administration tickets are completed correctly and within SLAs. Also, to provide Quality Assurance support*	▪ MBA from Osmania University, India ▪ Bachelor of Technology (B. Tech) from Jawaharlal Nehru Technological University, India	**Technical Domain:** ▪ **Programming Languages:** Java, C# ▪ **Databases & Packages:** SQL developer, SQL server., ▪ **Tools & IDEs:** Salesforce CRM, Visual Studio 2012 ▪ **Data Migration Tools:** Data Loader, Data Import Wizard ▪ **Other Technologies:** Java Script, SharePoint **Certifications:** ▪ Salesforce Certified Administrator ▪ Salesforce Certified Platform Developer 1 ▪ SharePoint 2010 Application Development

5 Organizational Experience

Team TechSur has supported numerous non-profit, Federal, state, and local customers to revamp their existing business processes and implement recommendations emerging from the Team TechSur assessment. Examples of some recent Salesforce-based business process and ongoing system administration and service support customers with similar BPHC challenges and requirements that have streamlined grant processes, reporting, and operations are listed below.

Example 1: Grants Management on Salesforce Platform for Legal Services Corporation (LSC)

LSC is the largest funder of civil legal aid for low-income Americans in the United States. LSC distributes more than $420 million in grants annually. In 2017, LSC tried but failed to revamp their grants processes and systems. In 2020, Team TechSur was engaged in leading the Gap Analysis of LSC's

existing grants management processes. The team conducted an in-depth study of LSC's processes against best practices and proposed solutions that eliminated non-value-add activities, increased coordination, compliance, and collaboration across the organization. Based on recommendations from the Gap Analysis, LSC has configured a cloud-based grants management system and improved processes resulting in:

- **Being Compliant and Collaborative:** Recommended solutions have established and enforced a clear set of uniform procedural directives, templates, and tools that brought structure and consistency to LSC's ad hoc processes;
- **Creating capacity**: LSC staff can spend less time doing manual or administrative tasks;
- **Being Data-Informed:** Staff can use data to monitor activities and make decisions; and
- **Serving external stakeholders:** In addition to internal staff, the digital tools and revised process provide accessibility and benefits to external stakeholders.

Example 2: Grant Funding for Los Angeles Homeless Services Authority (LAHSA)

Team TechSur led the Business Process Assessment (BPA) for the Los Angeles Homeless Services Authority (LAHSA). LAHSA coordinates and manages more than $400 million annually in federal, state, county, and city funds for programs that provide shelter, housing, and services to people experiencing homelessness. As largely a pass-through agency, LAHSA struggled to procure, allocate, contract, and monitor alignments to their funder requirements. The BPA identified seven prioritized areas to improve its contracting process, including policies, procedures, strategic IT plans, and clarifying roles and responsibilities. Clarifying roles and responsibilities led to a daily 'stand up' to set clear priorities for the assigned cross-functional team. By leveraging existing technology, a dashboard helped identify As-Is process bottlenecks. The team conducted the post gap analysis, and supported implementation of the Grants Management System on Salesforce CRM. The team architected the design integration for Salesforce CRM with the Agency's Financial System. They also have been supporting Tier 2 and Tier 3 issues since launch. The team results significantly decreased the number of days taken to execute a contract from the RFP award date. LAHSA continues to engage the team to facilitate strategic recommendations from the Business Process Assessment results.

Example 3: National Endowment for Democracy (NED) Grants Management System on Salesforce

The National Endowment for Democracy (NED) is a private, nonprofit organization founded in 1983 and dedicated to the growth and strengthening of democratic institutions around the world. Based in Washington DC, NED makes approximately 1,600 grants annually to support the projects of non-governmental groups abroad who are working for democratic goals in more than 90 countries. NED was seeking to migrate from a legacy system that was cumbersome, difficult to maintain, and lacked the necessary integration capabilities they needed to support their grantees.

Team TechSur has provided the full set of implementation and project management services to NED as it moved from its legacy system to GovGrants (HexPortal) on the Salesforce platform. Team TechSur has supported various aspects of NED's design, configuration, customization, and testing of the new grants management system. This included working with NED to optimize their grants management processes including workflows, fields/forms, controls, alerts/notifications, document templates and user dashboards. In addition, Team TechSur worked with NED to set up a Grantee Portal that allowed for different grantee touchpoints including application submission, payment submission, reporting, and monitoring including narrative and financial reports.

Data migration was a major aspect of the implementation as well. The Team TechSur team led the effort to migrate historical data including template preparation and field mapping, enabling the exports/imports of data, as well as validation of loaded data. In addition, Team TechSur worked to integrate GovGrants

with a number of third-party systems including blacklist watchlist(s), Microsoft Office, and NED's accounting system (Microsoft Dynamics NAV 2017 Serenic Navigator). The Serenic integration will allow award budget management and electronic payment requests.

Example 4: Grants Management System Implementation on Salesforce Platform for Region of Peel, Canada

Team TechSur was engaged in the modernization of Grants Management for the Human Services Department at the Region of Peel in Canada, which plays a critical role in expanding social services to more than 1,400,000 residents within the Region.

Historically, the Region of Peel has managed grant programs using various legacy systems and manual processes, which vary by funding program where technology solutions were acquired per business need. The Region sought the unification of grant processes based on best practices and a single technology platform that converges disparate technologies and creates efficiencies for the organization related to infrastructure, solution interoperability, and transferable staff skills that enable a more effective and efficient rollout and adoption.

Team TechSur was instrumental in implementing a common set of processes and a Salesforce Software as a Service (SaaS) solution that meets the needs of several Region of Peel programs while being flexible enough to accommodate new grant programs. The implemented solution has supported the Region's strategic objective of improving operational efficiencies and have converged legacy systems and manual processes with a flexible and configurable single Salesforce-based solution that eliminates the need for hardware, software, disaster recovery, and backups. Additionally, the implemented solution is scalable, works on any device, and was extended to support Digital Signature.

The implemented solution has provided the Region of Peel with the ability to standardize and centralize its grants management processes such as application intake, application review, award/contract issuance, autopayment, financial reconciliation, progress and performance reporting, and closeout.

Automating grants processes and converging legacy technologies has freed up 10-12 FTEs and allows the Region to focus on expanding existing funding programs and developing new programs to support the Region's mission, initiatives, and goals. Also, the Region has reaped the following benefits:

- All elements of the grants process can be included in ad hoc reports, which increases the ease of reporting, tracking of grant funds, and grants managers taking timely corrective actions;
- The increased transparency from an online portal has significantly increased the overall level of satisfaction among applicants and grant recipients; and
- Improved governance, compliance tracking, and risk management across grant programs have been realized as the system allows for risk and compliance policies to be enforced by the tool and reduces the overall grants exposure through system validation and automation.

Appendix A – Resumes

Project Manager			
Employee Name:	Sudhee Maddur	**Years of Experience:**	24+

Educational History

Education

- MS, IST, George Washington University, Washington, DC
- Masters in Computer Applications (MCA), JNT University, Hyderabad, India

Certifications/Specialized Training

- Active Project Management Professional (PMP) certification – License 239594
- Ex-Chair – PMIWDC – Loudoun Community
- Certified Salesforce Administrator & Certified Sales Cloud Consultant - Active

Professional Summary of Experience and Accomplishments

Senior technology leader with over 24 years of extensive experience in product development, program management, and business development; increasing market share and developing high performing engagement teams for Government, non-profit and commercial entities. More than 15 years managing market portfolios, nurturing client relationships, and building corporate capabilities. I specialize in product, program and performance management, organically growing market presence through the development, and implementation of services around strategic planning, Legacy systems modernization, SaaS product solutions, Cloud migration and Cloud implementation using AWS and Azure, risk management, and financial management. A proponent of open-source technologies with a background in Web and database technologies. Ex-Chair of PMIWDC-Loudoun Community chapter under PMI. Active PMP, CSM, Salesforce Administrator and Salesforce Service Cloud consultant certifications along with COTS product development and sales experience. Over 8 years of hands-on Salesforce experience (Lightning, APEX, MuleSoft, Tableau etc.)

Description of positions in each project and their key functions

Project: CRM, and Case Management System Development	**Nov 2017 - Present**

Function: Project Manager

Responsibilities:

- Formed the CRM practice for the company and achieved a 110% growth in developing and deploying Case Management solutions built using Salesforce and Dynamics CRM at Federal, non-profit, and State installations.
- Achieved partner certification status with Salesforce for the company.
- Led a 11-member team to build Grants Management COTS product called mGrants and deployed it on Microsoft AppSource and Appian App Market.
- Formed and led the Business Development team and activities at MERP Systems.
- Led the successful CMMI Level III planning and appraisal efforts of MERP.
- More than 11 years managing complex portfolios of up to 5 projects with P/L responsibility up to $18M and up to 60 direct/indirect employees/contractors in Federal Civilian business unit.
- Managed the utilization targets of multiple teams and projects to meet or exceed financial targets for each engagement established during the bid and proposal process.

Project Manager

- Established clear performance objectives to foster accountability, growth and success and ensure teams adhere to established processes and published methodologies.

Project: Grants SaaS COTS Product Built Using Salesforce	Oct 2010 - Nov 2017

Function: Project Manager

Responsibilities

- Led the development of a Grants SaaS COTS product called GovGrants built using Salesforce.
- Led the product development team in the REI SaaS practice.
- Proficient with product road mapping, human-centered design practices, design thinking, prototyping, Agile development methodologies, estimation models for cost and effort.
- Led a portfolio of programs/projects at GSA, SBA and DOC in a multi-year, multi-million-dollar IDIQ
- Led the redesign and launch of SBIR.gov and green.sba.gov web sites at SBA
- Successfully launched a high-profile White House-led web site (www.BusinessUSA.gov) in 90 days by coordinating content submission from 23 partner agencies and continued managing the project through its million-user mark in 2015
- BusinessUSA.gov awarded ACT-IAC award for Igniting Innovation and received 2nd best Mobile app award in 2014
- Successfully led the development and launch of PREP (Performance Reporting Entry Portal) tool in the Performance Management Line of Business application at GSA and oversaw the launch of Performance.gov web site in 2012
- Successfully aided a client transition to Agile Scrum with DevOps and CI/CD pipeline built using Open-Source technologies such as Jenkins/Chef/Puppet along with GITHUB and JIRA. Built a Google Analytics dashboard for web analytics reporting. Used Tableau for reporting and D3 libraries for frontend development.
- Introduced Test Driven Development (TDD) for rapid prototyping new features to an agency project in the program.
- Led teams with more than 60 engineers across many projects as the Project Manager in the Business Unit.
- Oversaw a comprehensive content audit and subsequent information architecture recommendations for howto.gov
- Launched a non-profit organization's web site in less than 30 days with comprehensive editorial workflows using Drupal
- Led the teams in an ISO 9001:2008 and CMMI Level 3 re-certification SCAMPI audits in 2015
- Co-authored presentation and associated white paper "BusinessUSA – Transformation" and presented to Government executives

Project: HUD Business Process	Jul 2009 - Sept 2010

Function: Manager / Lead - Portal Specialist

Responsibilities

- Led the launch of redesigned HUD.gov and its Intranet portal on Oracle Web Center
- Managed project team to deliver strategic and tactical business solutions for clients, including application and product development, program management, and vendor evaluation using Oracle WebCenter
- Created and build technical solution and product roadmap for migration from ColdFusion to Oracle WebCenter
- Utilized Agile project management tools and methods to define and manage requirements and delivery
- Built a Content Management strategy and implemented business process workflows

Project Manager
• Contributed content and editorial feedback for company white papers • Successfully launched HUD.gov within budget and on time using Oracle Web Center platform

Business Analyst

Employee Name:	Mageshwari Jayaraj	Years of Experience:	10+

Educational History

Education

- Master of Business Administration from Pondicherry University, India
- Bachelor of Technology in Electronics and Communication Engineering from Pondicherry University, India

Certifications/Specialized Training

- Certified Scrum Master
- Salesforce Certified Administrator

Professional Summary of Experience and Accomplishments

Mageshwari Jayaraj is an experienced Business Analyst adept at translating business user concepts and ideas into comprehensive business requirements and design documents. Certified Salesforce Administrator & Scrum Master with 10 years of experience in managing and operating full-lifecycle enterprise scale implementation. Significant experience with standard Project Management methodologies and SDLC for budget estimation, project planning and risk management. Extensive knowledge and experience of Agile principles, Conflict resolution, iteration/sprint planning, backlog grooming, sprint reviews, demos and retrospect while adhering and implementing Capability Maturity Model (CMMI) methodologies to effectively manage IT projects.

Description of positions in each project and their key functions

Project: Customization and Implementation of Grants Management Product for Region of Peel, Canada	Apr 2019 - Present

Function: Business Analyst

Responsibilities:

- Responsible for creating salesforce data model specifications by understanding the customers' business processes.
- Develop time dependent workflows as per the requirement.
- Evaluate Data entry, import processes and ensure proper Data quality standards exist for the Salesforce.com application.
- Create Custom Objects and defined lookup and master-detail relationships on the objects. Also create junction objects to establish connectivity among objects.
- Perform documentation of functional requirements using wireframes, while conducting user acceptance testing (UAT) sessions
- Manage the implementation of functional requirements in collaboration with globally distributed teams
- Support implementation of grants management system and collection of complex business requirements through testing and production rollout.

Project: Customization and Implementation of Grants Management Product for County of Orange, State of Utah, Florida Department of Education	Feb 2018 - Mar 2019

Function: Business Analyst

Responsibilities:

Business Analyst

- Responsible for gathering requirements and documenting grants management life cycle for County of Orange, while functioning as a product owner for the enterprise Grants Management System (GovGrants) on Salesforce platform
- Handle the maintenance of product backlog and develop cases in Team Foundation Server (TFS) for each Sprint
- Configure various Custom Reports and Report Folders for different user profiles based on the need of the GovGrants user.
- Analyze complex data and draw business-relevant conclusions into meaningful report designs
- Manage the implementation of functional requirements in collaboration with globally distributed teams
- Support implementation of grants management system and collection of complex business requirements through testing and production rollout.

Project: Customization and Implementation of Grants Management Product for City of San Diego, Louisiana Community and Technical College	**Jul 2017 - an 2018**

Function: Business Analyst

Responsibilities:

- Responsible for the Salesforce system design and implementation of in-house grants management product
- Responsible for creating Salesforce data model specifications by understanding the customers' business processes.
- Decompose, refine, and document requirements using appropriate graphical & textual techniques, including data flow diagrams, data models, functional and technical specifications using Team Foundation Server (TFS) and Visio.
- Involved in complete Support of the GovGrants Product for regular change requests and enhancements.
- Migrate legacy grants Data into the Enterprise Grants Management System using Salesforce Data loader.
- Customize the Dashboards to track grant details of State and County agencies.
- Create page layouts, search layouts to organize fields, custom links, related lists and other components on a record detail and edit pages.
- Write Custom Formula fields and Validation rules for GovGrants modules.
- Develop time dependent workflows as per the requirement.
- Evaluate Data entry, import processes and ensure proper Data quality standards exist for the Salesforce.com application.
- Create Custom Objects and defined lookup and master-detail relationships on the objects. Also create junction objects to establish connectivity among objects.
- Monitor system performance using Google Analytics to detect and resolve problems during deployment and Support change management.
- Use SOQL & SOSL with consideration of Salesforce Governor Limits for data manipulation needs of the Application using platform database objects.
- Configure various Custom Reports and Report Folders for different user profiles based on the need of the GovGrants user.
- Analyze complex data and draw business-relevant conclusions into meaningful report designs
- Configure/Create Profiles, Roles, and Permission Sets for the organization and setting up Field-level, Object-level security rules for Salesforce based GovGrants.

Project: Enhancement of an Existing Ecommerce Portal and Developing Various Applications That Helped Selling Rosetta Stone's Solutions Online	**Jan 2015 - Oct 2016**

Business Analyst

Function: Business Analyst

- Liaised with Business and Functional owners during risk engineering and high-level review sessions to derive and execute action plans, meeting deadlines and standards.
- Interfaced with business users to prepare and update Business Process Requirements (BPR) and Software System Requirements (SSR). Created test cases and test scripts.
- Ensured all artifacts complied with corporate SDLC Policies and guidelines.
- Prioritized outstanding defects and system problems, ensuring accuracy and deadlines were met.
- Performed GAP analysis of business rules, business and system process flows, user administration, and requirements.
- Developed use cases for new product functionality. Updated SOPs and WIs.
- Documented Software System Requirements (SSR) and BPR.
- Updated System Change Request (SCR) forms for Product Data Management (PDM).
- Traced test cases and functional specifications to SSRs and BPRs.
- Applied change requests, versions, and addendums.
- Developed process mapping of current and future business processes.

Specialist Level II

Employee Name:	Nambi Raghupathy	Years of Experience:	13+

Educational History

Education

- Master of Business Administration (MBA) – Sam M Walton College of Business, University of Arkansas
- Bachelor of Engineering – Electrical and Electronics, PSG College of Technology, India

Certifications/Specialized Training

- PMP Project Management Professional - PMI Institute
- Salesforce Certified Administrator
- Salesforce Certified App Developer

Professional Summary of Experience and Accomplishments

Nambi Raghupathy has more than 13 years of Experience in Salesforce.com Implementation, Cloud Transformation, Solution Design, Project Management and AppExchange Product Management. He has implemented various modules of Salesforce for 75+ clients in the last 10 years. Mr. Raghupathy has been a Salesforce and Cloud Evangelist enabling many organizations transform their BD, sales and support teams from legacy systems and processes to Salesforce.com. His key strengths include strong interpersonal and communication skills, following best practices, problem-solving ability and adherence to project schedules.

Description of positions in each project and their key functions

Project: Consulting with Clients on the Salesforce Platform	Ongoing

Function: Salesforce Solution Architect

Working with Stealth Solution clients in designing and building applications on the Salesforce platform. Advising clients on how to best transition to Salesforce platform and developing the roadmap for transforming legacy systems into best-in-class cloud applications on the Salesforce platform.

Project: Implementation of Disaster Center Management System on Salesforce Platform for the Small Business Administration (SBA.gov) Office of Disaster Assistance (ODA)	Mar 2020 - Present

Function: Salesforce Technical Analyst

Project involves transformation of multiple legacy systems in a single Salesforce application primarily involved in Disaster Management module of Salesforce implementation

- Identify pain points and design a solution for end-to-end Disaster management on Salesforce platform
- Prepare Business Requirements Documents, conduct review sessions with developers and ensure designed solution is delivered on time with highest quality.

Project: Applications Migration to Salesforce for the Maryland Health Benefit Exchange	Nov 2016 - Feb 2020

Function: Salesforce Solution Architect

Identified Legacy Applications to be migrated to Salesforce.com. Designed and developed various applications on Salesforce platform to support different verticals within the State Agency.

- Implemented Salesforce Service Cloud for MHBE Call center to support handling of over 5000 cases every day

Specialist Level II

- Modernized the legacy Learning Management System using Salesforce platform and customer communities.
- Implemented a time tracking and invoicing system for all consultants currently working with MHBE

Project: Salesforce Implementation	**Jul 2008 - Oct 2016**

Function: Salesforce Project Manager

Implemented Salesforce for more than 50 clients on the east coast. Conducted Business Process Review sessions for all of the clients to determine the “as is” and “to be” business processes and implemented the same in Salesforce. Designed solutions to address the client’s business problems and worked with the development team to implement the solution. Conducted end user training for all users and did a knowledge transfer for all the system administrators

- Developed and Managed products on Salesforce AppExchange Platform
- Implemented Salesforce for more than 50 clients in various verticals
- Designed solutions, performed data migrations and conducted end user trainings along with change management for all implementations.

Specialist Level III

Employee Name:	Deepika Vanamala	Years of Experience:	5+

Educational History

Education

- MBA from Osmania University, India
- Bachelor of Technology (B. Tech) from Jawaharlal Nehru Technological University, India

Certifications/Specialized Training

- Salesforce Certified Administrator
- Salesforce Certified Platform Developer 1
- SharePoint 2010 Application Development

Professional Summary of Experience and Accomplishments

Deepika Vanamala has more than 5 years' experience of business process analysis of various corporate functions. Understanding of business process flows was then augmented by Deepika to not only translate into technical functional specifications that could be used by various software platform development teams but also performing as part of the development teams. This led to cloud computing technologies, specifically on the Salesforce platform, where Deepika used the business process skills to support client reported issues, translating into technical based solutions that were then deployed on Salesforce.

Description of positions in each project and their key functions

Project: Behavior Driven Development and Support	Oct 2018 - Present

Function: Salesforce and Automation Engineer

- Develop test suites and test cases for Salesforce app developments
- Compiled Behavior Driven Development (BDD) automation testing framework, including translating test cases into BDD format, writing java base code for the automation framework written on Selenium, and executing test cases
- Perform manual testing including but not limited to functional, regression, integration, usability, cross-browser, and smoke Testing.
- Utilize SQL to create scripts and extract data to perform data validation
- Develop specifications for the GovGrants Salesforce Case Management module and codifying functional specifications.
- Implement security and sharing rules for different users at different levels of organization.
- Perform Data Migration using Salesforce Data Loader and Salesforce Data Import Wizard.
- Assist developers in responding to inquiries from users and technical support issues on Salesforce.

Project: Corporate Internet, Intranet, and Extranet Development	Oct 2013 - Nov 2014

Function: SharePoint Developer

- Developed corporate Internet, Intranet and Extranet sites using SharePoint 2013/ 2010.
- Involved in gathering the requirements, analysis, design, development, testing and deployment of the project.
- Evaluated SharePoint 2013 while installing and configuring SharePoint 2013 farms and upgrading from SharePoint 2010 farms.

Specialist Level III

- Architected, developed and implemented solutions in SharePoint 2013.
- Worked with Visual Studio 2012 with C# and SharePoint Object Model for addition & customization of Portal and had extensive experience in working with both farm and Sandbox environment solutions.
- Branding and customizing the site using SharePoint Designer 2013, master pages and CSS.
- Developed out of Box SharePoint Features, SharePoint Designer Applications, Custom Web Parts and Workflow to manage external user profiles.
- Designed InfoPath forms with different views using InfoPath 2013 designer.

Project: Global Consulting	**Dec 2009 - Sept 2012**

Function: Associate Project Consultant

- Configured HR Module modifications within SAP
- Customized Organization Structure, Enterprise Structure and Personnel Structure.
- Configuration of Personnel Administration – Configuration of Personnel Actions, Dynamic Actions, Infotype views, Header Modifications, Screen Modifications and configuration of Infotypes required for Maintaining Master Data of employees.
- Creation of Client Specific job details in Personnel Administration and enhancements of the reports.
- Configuration of Personnel Development Module – Creation of qualification catalogs.
- Expertise in configuration of Time Management Module – configuration of works schedules, Absence quotas and Attendance quotas.
- Supported user tickets from Portal users and HR role assignment checks.
- Assisted team members in the client custom reports analysis, Business object documentation and testing of processes after EHP5 installation.
- Job monitoring involving HR Security roles and data analysis jobs.
- Data Migration/Data Uploads using tools like LSMW.
- Extraction of daily ticket status report and coordinating with the team lead.
- Interacting with users to receive detailed information about the tickets.
- Understanding the Business process enhancements of the client and gathering the information about Business demands.
- Resolved all issues to remain within SLAs.

Specialist Level III			
Employee Name:	Devin Chavez	**Years of Experience:**	4+

Educational History

Education

- A.A.S in Graphic Design, Montgomery College - Takoma Park, MD

Certifications/Specialized Training

- Salesforce.com Certified Administrator

Professional Summary of Experience and Accomplishments

Devin Chavez has a focused career around the Salesforce platform and user interactions from communications in understanding the challenges of their business environment to recommendations of solutions. Configured solutions were overseen by Devin from a quality management, testing and deployment perspective. Solution changes and lessons learned are translated by Devin for development of user training materials.

Description of positions in each project and their key functions

Project: Grants Management System Application Support	**Apr 2017 - Present**

Function: Associate Consultant – Application Support Specialist

- Provide proficient client technical support.
- System configuration (maintenance, system enhancements/upgrades, etc.)
- Creation of reports and dashboards
- Develop and implement Training for end-users
- QA and regression testing
- Assisting with UAT
- Data quality and integrity
- Maintain user roles and profiles, security settings, access settings, etc.
- Build client relationships for strong trust in software use.
- Team-orientated environment, Sprint planning and Agile workflow experience.

Specialist Level III

Employee Name:	Rohith Katta	Years of Experience:	4+

Educational History

Education

- Master of Science in Civil Engineering from Clemson University, South Carolina
- Bachelor of Technology in Civil Engineering from Indian Institute of Technology, Kharagpur

Certifications/Specialized Training

- Salesforce Certified Administrator (ADM 201)
- Salesforce Certified Platform Developer - I (DEV 401)

Professional Summary of Experience and Accomplishments

Rohith Katta has transformed from a design engineer background perspective to becoming a certified Salesforce administrator paving the way into software development and configuration as a certified Salesforce Platform developer. Accomplishments in understanding Salesforce user perspectives has accorded Rohith the ability to effectively translate user requirements into developed Salesforce solutions.

Description of positions in each project and their key functions

Project: Salesforce Projects Contractor	Dec 2018 - Present

Function: Salesforce Admin/Developer

Responsibilities:

- Define business requirements for design on the Salesforce platform
- Preparing functional and technical design documents
- Designing the required entities like custom objects, creating the relationships/ junction objects like Master-Child, Lookups, and Entity relationship data model.
- Integrate AppExchange apps into client's environment
- Data Migration from other applications to Salesforce using Apex Data Loader.
- Participate in all stages of Software Development Life Cycle (SDFC) i.e., System Analysis, Design, Development and Testing.
- Provide expertise with Object Oriented Design (OOD), Analysis (OOA), based on Unified Modeling Language (UML) architecture
- Create Lightning pages and Lighting custom tabs from lightning app builder
- Proficient with all functionalities related to the Service cloud and Sales Cloud

Project: NTT Data	May 2017 - Nov 2018

Function: Salesforce Administrator

Responsibilities:

- Salesforce Application setup activities, customizing applications to match functional needs of the organization.

Specialist Level III

- Interacted with various business team members to gather and document the requirements.
- Implemented the requirements on the Salesforce platform and Force.com IDE Plug-in using Eclipse.
- Designed, implemented and deployed the Custom objects, Page layouts, Custom tabs, Components to suit to the needs of the Application.
- Used field level security along with page layouts in Lightning to manage access to certain fields
- Manage page layouts, fields, and system interface/capabilities, Lightning Component
- Created various profiles and configured the permissions based on the organizational hierarchy requirements.
- Created the workflows for Automated Lead Routing, Lead Escalation, Alerts and Custom Coaching Plans.
- Use of Data Loader and scheduling timely data backup operations using Apex Scheduler.
- Bulk data migration for the objects like Users, Accounts, Leads, Contacts, Campaigns, Campaign Members, Quotes
- Implemented escalation rules, automatic case generation and their escalation to call center representative, and generated email alerts for quick issue resolution.
- Used Salesforce Chatter to provide real time notifications of changes in Accounts, Leads and Opportunities to help sales and service teams to be more efficient.
- Role of Support Engineer for the internal users and helped them in getting used to the Application, generated reports and saved them for further access to the users.
- Customized the Dashboards to track usage for productivity and performance of business centers and their sales teams.